

Leadership for Co-teaching: A Distributed Perspective

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### (ABSTRACT)

Educational leadership is challenged with meeting the requirements of No Child Left Behind (NCLB) and the Individuals with Disabilities Education Act (IDEA) legislation which mandates an education for all students. The focus on accessibility and accountability has resulted in more students with disabilities being served in the general education setting. The co-teaching service delivery model is offered in the school environment to provide an education for all students and is intended to include instruction that is specially designed for students with disabilities. Instructional leadership is essential to a successful implementation and maintenance of inclusive practices.

This study sought to provide a better understanding of instructional leadership practices of the co-teaching service delivery model. The purpose of the study was to describe and explain how leaders support co-teaching. A distributed perspective based on the combination of activity and distributed cognition theories has been developed to study school leadership. This distributed perspective views leadership practice as an interaction between leaders, followers, and the situation (Spillane, Halverson, and Diamond 2004). This study examined instructional leadership practices of the co-teaching service delivery model at the elementary level.

Data were collected through a qualitative design, using interviews, observations, and review of documents. Interviews were conducted with administrators responsible for the direct supervision of the co-teaching model and with co-teachers, both general and special educators. Observations occurred in the school setting and related documents

were collected and analyzed. The distributed leadership perspective guided the data collection focusing on leadership tasks and functions, task-enactment, and social and situational distribution of leadership practice. The data revealed leadership tasks that included forming the team, scheduling, assigning instructional roles, allocating resources, and developing the co-teacher relationship. Leadership was shared between the administrators and teachers with both providing leadership. School environment, organizational arrangements with available resources, and participants' profile were identified as factors influencing the leadership practice of co-teaching. It is hoped by understanding the leadership roles and responsibilities of co-teaching, educators may better understand and nurture a co-teaching model that supports students in an inclusive environment.

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## CHAPTER ONE

### INTRODUCTION TO THE STUDY

Education in the 21<sup>st</sup> century is presented with new challenges. Public scrutiny which seeks accountability, the introduction of high stakes testing, and the possibility of opening up education to market forces put pressures on the educational system. The continuing mandates to provide an individual and specialized education program for students with disabilities adds to the responsibilities of educational leadership. At the same time fiscal and human resource limitations are a concern. In this climate superintendents and principals need to consider and develop innovative solutions that will help them be effective instructional leaders as they face these challenges.

Collaboration has been embraced as a vital method of problem solving. Business entrepreneurs, politicians, and some religious leaders are adopting the concept of collaboration as a tool for success and praising the results of this process. The education community, experiencing pressures of the 21<sup>st</sup> century with its commitment to inclusive education, testing and accountability, a diverse student population, and fears of diminishing resources has also turned to the collaborative approach. Many educational stakeholders believe that the expansion of collaboration as a technique holds promise for providing a quality learning environment for all children. The adoption of the concept of collaboration has led to the development of various co-teaching models.

Leadership is a complex process of thoughts and actions that solves problems, builds culture, nurtures leadership in others, communicates values and purpose, and institutes meaningful changes (Kelley & Peterson, 2000). Faced with present day demands and expectations, school principals must evaluate their approaches to the diverse and demanding roles of their profession (Fullan, 2002). It is no longer possible

for one person to manage effectively the changes and accountability demands now imposed on school leaders. The task must be divided, distributed, and developed among other individuals. Recognizing this need, educational administrators could consider nurturing and helping develop other leaders within the school setting in order to support the goal of providing a quality education for all students.

### Need for the Study

Co-teaching, as a special education service delivery model, provides promise as well as challenges to those who are committed to the education of students with disabilities. The Individuals with Disabilities Education Act (IDEA) requires educators in American schools to provide students with disabilities a free appropriate public education (FAPE) in the least restrictive environment (LRE). For most students with disabilities a general education classroom is considered to be the LRE. Many schools are using the co-teaching service delivery model as a way to educate students with disabilities in general education classes. Co-teaching which involves the cooperation of general and special educators is a service delivery model with the potential to meet both FAPE and LRE requirements because it allows for instruction that ensures the delivery of what students need to learn in an environment with their age appropriate peers.

Research regarding the implementation of collaborative co-teaching indicates that challenges inherent in this model might be best addressed from the instructional leadership perspective. From the standpoint of teachers and administrators in various studies, leadership concerns centered around the implementation of co-teaching such as (a) co-planning time, (b) student caseload, (c) student composition, (d) relationships among co-teachers, and (e) knowledge of content to be taught.

Common sense suggests that administrative leadership would be crucial to resolving these problems. Yet research is lacking regarding leadership practices as they relate to the co-teaching service delivery model. If studies indicate concerns related to the establishment, implementation, and support of co-teaching then it is necessary to investigate the instructional leadership practices related to this service delivery model.

### Purpose of the Study

The purpose of this study was to describe and explain the instructional leadership practices related to the collaborative strategy of co-teaching. Specifically, this inquiry sought to provide a better understanding of the instructional leadership practices used in implementing the co-teaching of special and general education teachers as a service delivery model.

This study used a distributive leadership perspective as a conceptual framework. Spillane, Halverson, and Diamond (2004) suggested that in order to understand how and why school leaders do what they do one must explore the interaction of leaders' thinking and behaviors within their situations. These authors developed the distributive perspective, based on a coalescence of activity theory and distributed cognition theory to study school leadership. This distributive perspective presents leadership practice as resulting from a system of interactions among leaders, followers, and the situation. In this study the distributive leadership perspective guides the examination of instructional leadership practices as they relate to tasks and functions; task-enactment; and the social and situational distribution of task-enactment related to co-teaching service delivery at the elementary level.



The overall research question that guided this study was: What are the leadership roles and practices related to providing instruction through the co-teaching service delivery model? Subordinate questions embody components of the distributive leadership perspective in addressing the following issues:

#### Research Questions

1. Who are the personnel responsible for providing instructional leadership for a co-teaching model?
2. What are the professional responsibilities and roles of these instructional leaders related to the co-teaching model?
3. How do instructional leaders carry out these responsibilities as it relates to co-teaching?
4. How do factors in the school environment support or inhibit them in providing leadership for co-teaching?

#### Overview of Methodology

The qualitative methodology used for this study was case study (Yin, 1994). One elementary school with four co-teaching teams was selected for the study. Data collection procedures consisted of conducting semi-structured interviews of three administrators and four co-teaching teams, observations, and review of documents. Interviews were conducted with building and central office administrators responsible for the direct supervision of the co-teaching model and interviews were also conducted with teams of co-teachers. Observations occurred in the school setting and documents related to the co-teaching service delivery model were collected and analyzed. The central ideas of the distributed leadership perspective guided the data collection: leadership tasks and

functions, enacting leadership tasks, social and situational distribution of leadership practice.

#### Conceptual Framework: Distributed Leadership Perspective

Leadership Theory provides a lens through which to study the leadership for co-teaching. Theory can deepen our understanding of a situation and thereby inform action. It can provide a framework that helps us interpret and understand the present practice. A useful theory can facilitate reflection and thus lead to insight and possible change. Conceptual frameworks set the boundaries for the study of phenomena within a qualitative study.

The distributed leadership perspective provides a frame for studying leadership practice in the area of co-teaching. Recognizing a lack of attention to the practice of school leadership, Spillane et al. (2004), initiated an in-depth analysis of the practice of school leaders. Spillane and his colleagues desired to understand how and why school leaders do what they do by suggesting an “integrative conceptual model that explores the interaction of leaders’ thinking, behavior, and their situation” (p.8). They formulated a distributed theory of leadership practice based on concepts from distributed cognition and activity theory, both of which have a strong foundation in the understanding of human action. These theories stress the importance of social context as a component of intelligent activity.

### *Activity Theory*

Activity theory is concerned with practice and the tools that mediate the activity. The tools/artifacts and language are seen as a means for accumulating and transmitting knowledge and therefore they influence the behavior and the thought processes of individuals. The object of activity theory is to understand the unity of consciousness and activity. This approach incorporates the concepts of intentionality, history, mediation, collaboration, and development in constructing consciousness. Activity theory enables researchers to study data on multiple individuals working together in their natural setting. Vygotsky formulated this theory in the 1920s as a way to understand the relationship between individuals and their social environment (Cole, 1985; Wertsch, 1985). Vygotsky believed that individuals learn and develop as they are acting toward a goal. He focused on the dynamic interaction between the individual, social others, the situation, and artifacts.

### *Distributed Cognition Theory*

Distributed cognition theories expand our knowledge of human activity by bringing our attention to social contexts as an integral component of intelligent activity. Emphasis is put on the situation where the activity is taking place and cognition is seen as distributed socially through other people working toward the same goal. The distributed cognition model claims that cognition does not have a single locus inside one individual but is spread over entire systems of interacting individuals (Salomon, 1993).

The basic principle of the theory of distributed cognition emphasizes interactions between people and their environment. Distributed cognition attempts to provide an explanation that goes beyond the individual and exists within the context in which the

activity occurs (Rogers & Ellis, 1994). The theory suggests a focus on the distribution of the cognitive processes across members of social groups, i.e. people think in conjunction with others and with the help of culturally provided tools. Therefore, cognition from a sociocultural perspective is viewed as being stretched across mind, body, activity, and culturally organized settings (Lave, 1988).

Building upon distributed cognition theory and activity theory, Spillane et al. (2004), moved beyond considering individual activity and behaviors of leaders in formulating a leadership theory. Theirs is an integrative theory that examines the interaction of the leaders' thinking and behavior with the situation and tools. Spillane et al. are concerned with the leaders thinking and action in the situation and focus on tasks around which school leaders organize their practice. The theory is based on three assumptions. First, school leadership is understood by considering the tasks of informal and formal leadership. Second, leadership is stretched over the acts of individuals within an organization. Third, leadership is distributed in and through an organization's situation or context. Spillane et al. define school leadership as the identification, acquisition, allocation, coordination, and use of the social, material, and cultural resources necessary to establish the conditions for the possibility for teaching and learning. They adopt a transformational perspective on leadership with its goal to bring about change in teaching and learning.

Spillane et al. (2004) developed their distributed theory of leadership based on leadership tasks and functions, task-enactment, social distribution of task-enactment, and situational distribution of task-enactment. A distributed perspective of leadership tasks assumes that human activity and knowledge is spread across people and situations

(distributed). Spillane et al. use the phrase “stretched over” to emphasize how tasks are co-enacted by two or more leaders. According to them leadership practice is socially distributed in a number of ways. First, it can be distributed between two or more leaders who are responsible for different aspects of one goal. Second, two or more leaders can be working separately on the same goal. Thirdly, two or more leaders can work together in tandem toward the same goal. Each leader is bringing different knowledge and skills to the task. In such a situation the leadership task would best be studied across the situation as opposed to just focusing on the individual leader. Social distribution of leadership practice involves a relationship between leaders and followers. Leaders not only influence followers but are also influenced by them.

The distributed perspective develops the significant aspects of the context of the situated practice. It stresses that the situation does not simply affect what leaders do but is fundamental to the leadership practice. Consequently the focus is on three dimensions of the situation that are fundamental to the leadership practice: designed artifacts, organizational arrangements, and language. Designed artifacts refer to tools the school system would use. This may include forms, memos, meeting agendas, schedules, and calendars. A study of leadership would involve reviewing and analyzing how such artifacts are implemented by leaders. The organizational arrangements, too, would hold significance for studying leadership since the environment is vital to the leadership practice. Although these structures can support or inhibit the goal of the organization it is important to note that they can be changed by the actions of the leaders.

The distributed leadership perspective is a grounded framework for studying leadership practice. It emphasizes that school leadership activity, the tasks and functions,

as opposed to an individual school leader, should be analyzed when studying such practice. The distributed perspective focuses on the situation and interaction of leaders and followers as a fundamental element in leadership practice. The tools and artifacts, too, are essential to understanding the practice of leadership and must also be studied.

A thorough review of the literature identifies many issues related to the leadership of co-teaching. These tasks and functions and their enactment present challenges to educators involved in this teaching model. Often the social and situational environment is presented as an important element in the implementation and maintenance of co-teaching. The leadership of co-teaching is rarely addressed as an interactive process. The distributive leadership perspective offers a framework in which to study the leadership involved in co-teaching. The present study investigated the co-teaching leadership in one elementary school and used this perspective as a framework. Figure 1 illustrates the conceptual framework that guided this study in an investigation of the leadership practice of co-teaching. The study, therefore, examined instructional leadership practices as they related to tasks and functions; task-enactment; social and situational distribution of task-enactment of co-teaching service delivery.



**Figure 1.** Conceptual framework displaying how leadership practice of co-teaching is an interaction between the tasks and functions; enacting the leadership tasks; and the social and situational distribution of task enactment.

## Definition of Terms

The following terms are used throughout this study. Listed below are the specific definitions for these terms as they apply to this particular study.

*Co-teaching* is a specific special education service delivery model in which a general education and a special education teacher share leadership responsibility for planning, delivering, and evaluating instruction to a diverse group of students in primarily a single classroom setting (Cook & Friend, 1996).

*FAPE* is ensured through special education and related services that are provided at no cost to the parent, that meet state standards, that are provided at an appropriate school, and that are provided in accordance with the student's IEP (20 U.S.C. § 1401(8)).

*IDEA* is a special education law with the purpose to “ensure that all children with disabilities have available to them a free appropriate public education that emphasizes special education and related services designed to meet their unique needs and prepare them for further education, employment, and independent living” (20 U.S.C. § 1400(d)(1)(A)). The IDEA ensures that the rights of students with disabilities and their parents are protected (20 U.S.C. § 1400(d)(1)(C)) and that parents and educators are provided the tools needed to meet the needs of students with disabilities (20 U.S.C. § 1400(d)(3)).

*IEPs* are “a written statement for each child with a disability that is developed, reviewed, and revised in accordance with this section” (20 U.S.C. § 1414(d)(1)(A)).

*Leadership practice* is defined as the interaction of two or more leaders, followers, and their situation (Spillane et al. 2004).



*LRE* refers to the level of services that is most appropriate for the student while providing integration with non-disabled students (Bos & Vaughn, 1998).

*Special education* is defined as “specifically designed instruction, at no cost to parents, to meet the unique needs of a child with a disability” (20 U.S.C. § 1401(25)).

*Student with a disability* is a pupil who requires special education due to one of the following handicapping conditions: specific learning disability, emotional disability, other health impairment, autism, traumatic brain injury, orthopedic impairment, visual impairment, speech and language impairment, deafness, and multiple disabilities.

*Service delivery model* is a method of providing special education services.

*Tasks and functions* are recognized essential elements of instructional leadership; and the particular segments and activities that are necessary to fulfill the function. (Spillane et al., 2004)

*Task-enactment* refers to the reality of the practice of what leaders actually do as opposed to the theory of what they say they do. Leadership practice is analyzed by understanding how school leaders define, present, and carry out their tasks. (Spillane et al., 2004)

*Social distribution of task-enactment* is how the leadership practice is distributed using particular tools and artifacts. (Spillane et al., 2004)

*Situational distribution of task-enactment* recognizes the environment as an essential element of leadership activity. The symbols, tools, and artifacts are necessary to studying the leadership activity. (Spillane et al., 2004)

#### Limitations/Assumptions

A qualitative approach is one in which the researcher makes claims based on constructivist perspectives (Creswell, 2003). Limitations of this study include research

developed solely from data collected in one elementary school in a large suburban school district. The reader should be aware that transferability may be influenced by difference in settings and contexts. Therefore, detailed descriptions that characterize the district and the school setting and that describe the participants engaging in leadership practices related to co-teaching are provided in Chapters 3 and 4. This is a study of the leadership practices of co-teaching and does not include observations of teacher instruction and students in the classroom.

### Significance of the Study

This study was designed to provide in-depth descriptions that allowed educational leaders to explore and to reflect on instructional leadership practices as they relate to co-teaching. Even the most ardent advocates of the co-teaching model do not believe it is the complete solution to the complexities of inclusive education. Many studies do indicate that there are various concerns and problems with this service delivery model. However, there are also indications that when structured correctly, carried out by knowledgeable educators, and supported by administrators it can be a viable service delivery option along the continuum of service options which public school systems are required to make available. To contribute to the positive outcome of such a model, researchers may wish to study policies and practices that help generate success. Scarce research is available to the educational community concerning the instructional leadership practices involved in implementing the co-teaching service delivery model.

Effective instructional leadership is at the heart of successfully including all students in the life and community of a school. Those in leadership positions are key agents in promoting excellence in schools, maintaining quality services and facilities for

students, and creating change within schools to ensure that the students are prepared for the future (Benninghof & Singer, 1995). This study explored and explained the instructional leadership practices related to providing instruction to students with disabilities through the use of co-teaching service delivery. Furthermore, the study served to identify the personnel responsible for providing instructional leadership, their responsibilities, how these responsibilities are carried out, and factors in the school environment that support or inhibit them in providing leadership for co-teaching.

### Organization of the Study

The first chapter of the dissertation includes an introduction to the topic, the problem, a statement of purpose, research questions, theoretical framework, limitations of the study, definitions of terms, and significance of the study. Chapter 2 presents a review of the related literature, describes the problem in its current context, discusses how other researchers studied the issue, and poses further research needed to be studied. Chapter 3 describes the methodology used in the present study, including an explanation of the study's design, the sampling procedures, the data collection, management procedures, and the data analysis procedures. Chapter 4 presents the results of the study and chapter 5 discusses conclusions, implications, and recommendations for practice, and possibilities for future research.

## CHAPTER TWO

### REVIEW OF RELATED LITERATURE AND RESEARCH STUDIES

This chapter provides a foundation for a study of the leadership practices related to the co-teaching model. It begins with an overview of the free appropriate public education (FAPE) and least restrictive environment (LRE) mandates of Individuals with Disabilities Education Act (IDEA) policies. The importance of leadership practices and their relevance to co-teaching are discussed. The findings of research studies related to co-teaching are critically analyzed and synthesized through the Spillane, Halverson, and Diamond (2004) distributed leadership perspective. Then an argument is made to support the need for future research describing and explaining the instructional leadership practices related to the collaborative strategy of co-teaching.

In order to accomplish this review of literature, computerized database searches of ERIC, PSYCHINFO, and dissertation papers were conducted. References located in texts, book chapters, journal articles, and dissertations related to co-teaching also led to the identification of additional sources. In reviewing literature on co-teaching in general, search terms including but not limited to collaborative teaching, team teaching, least restrictive environment, service delivery models, and inclusive education were used. In order to locate studies related to co-teaching, the same databases were used, with the above search terms being paired with terms such as administration, administrative support, implementation, and leadership. These searches were limited to the time period following the renaming of IDEA in 1990 to the present. Studies were included for this

review that specifically addressed the following: (a) co-teaching tasks and functions, (b) roles and responsibilities, and (c) social and situational context for co-teaching.

### *Background of the Issue*

Professionals and their students in public schools face challenges in an era of accountability which includes accessibility. The requirements of No Child Left Behind (NCLB) and IDEA legislation force school leaders to reflect, evaluate, and ensure a quality education for all students. Educational leadership is ranked as the number one key variable associated with highly effective schools (Algozzine, Ysseldyke, & Campbell, 1994). The co-teaching service delivery model is offered in the school environment to provide an education for all students with instruction that is specially designed for students with disabilities. Recognizing the fundamental importance of instructional leadership it is essential to examine how leaders support co-teaching as a service delivery model in response to the mandates of accountability and accessibility.

IDEA is the federal law that guarantees students with disabilities the right to a public education. It mandates an education that is free, appropriate, and public in a setting that is least restrictive. IDEA endorses the concept of children with disabilities learning with their age peers but does not define LRE, believing educators can best do that. LRE requires that, to the extent appropriate, students with disabilities are educated with nondisabled students. Special classes, separate schooling, or other removal of students with disabilities from the regular education environment occurs only when the nature or severity of the disability is such that education in the regular classes with the use of supplementary aids and services cannot be achieved satisfactorily (20 U.S.C. § 1412(a)(5)(A)).

*FAPE, LRE, and Effective Programming Mandates and Policies*

In 1975 Public Law 94-142 was enacted which specifically extended the anti-discrimination protections to public education. School districts in their effort to comply with IDEA may not restrict individual rights and liberties beyond that which is minimally and reasonably necessary to provide each child with a disability with a FAPE (Thomas & Rapport, 1998). Individualized education placement decisions emanate from this concept and have caused parents, educators, and legislators to debate the issue of placement in the least restrictive environment.

Adhering to the myriad obligations imposed by IDEA requires a sustained, coordinated, and comprehensive effort from school administrators, teachers, and support personnel. Under the best of conditions, the challenge of meeting the requirements of the law is a daunting one. Committed, pro-active leadership from the superintendent, central office staff, and school personnel involved in the delivery of exceptional education services is needed to maintain focus and determination in achieving a quality education for all students. Facilitating inclusive schools “requires a rich appreciation of multiple perspectives and a greater understanding of specialized instruction. Skilled practitioners at work in an array of flexible instructional settings, including separate classes and schools, can ensure educational benefits to students with disabilities” (Crockett & Kauffman, 1998, p. 77).

Schools must offer students with disabilities a continuum of alternative placements in order to ensure that students’ educational needs are met in the LRE. A student’s placement in the general education classroom with supportive special education services is the first option the individualized education program (IEP) team must

consider. Honoring this continuum should include monitoring the student's progress and consulting with the student's general education teachers. Various levels offered along the continuum would include the general education classroom, pullout resource rooms, self-contained special education classrooms, public or private day schools, residential schools, and other care facilities. At every level in this continuum, different supplementary aids and services may be required to enable the student with disabilities to receive educational benefit (20 U.S.C. § 1412(a)(5)(A)). In trying to provide a successful educational experience while honoring the law, public educators have been challenged to evaluate and develop various innovations to educate students with and without disabilities together effectively. According to the 24<sup>th</sup> Annual Report to Congress on the Implementation of IDEA during the ten year period between 1990 and 2000 the number of special education students served for less than 21% of the school day increased 87.1%. By the year 2000 47.3% of students are served outside of their classroom less than 21% of their day. This increase of 87.1% shows the trend toward serving students with disabilities in inclusive environments. One strategy to foster inclusive instruction is the service delivery concept of co-teaching. This model is also referred to as collaborative teaching and team teaching by the educational community.

### *Collaboration*

Embedded within the education mandate of the IDEA is an acknowledgement that educational personnel must collaborate with one another and with families to meet the educational and emotional needs of students with disabilities (Villa, Thousand, Nevin & Malgeri, 1996). Collaboration is an interactive process that enables people with diverse expertise to generate creative solutions to mutually defined problems (Idol, Nevin, &

Paolucci-Whitcomb, 1994). Thousand, Villa, Paolucci-Whitcomb, and Nevin (1996) described observed benefits of collaboration in schools. Collaboration enables school personnel to meet diverse student needs through shared expertise and ownership of problem definitions and solutions. Collaboration shifts the organizational paradigm from a professional bureaucracy to problem solving teams to meet the individual needs of students. Collaborative instructional teams increase the likelihood that team members' basic human needs of survival and empowerment, freedom and choice, sense of belonging, and fun are met. In addition educators who model collaboration and invite students to join in as co-instructors, advocate, and partner in decision making, communicate the value of collaboration, and offer practice in behaviors that will serve students well in a global, interdependent society (Thousand et al., 1996).

The expectation in IDEA concerning LRE and the presumption that the general education classroom is that environment for many students with disabilities leads to increased consideration of collaboration. Likewise, the law's provision for participation of parents in their children's education and of general education teachers explains the growing emphasis on collaboration in schools. Public schools are reorganizing their service delivery models so that the general education curriculum and classroom might be a viable option for students with disabilities. Consequently, general educators and special educators are collaborating to provide educational access and benefit for all students. Two forms of collaboration are collaborative consultation and co-teaching (Weiss & Lloyd, 2003). Collaborative consultation provides indirect special education services. Using this model, the expert special education teacher problem solves and gives



information to the general education teacher. This support occurs outside the classroom, whereas co-teaching provides the support in the general education classroom.

Instructional leaders play critical roles in facilitating collaborative consultation or co-teaching efforts among instructional personnel. In establishing such efforts in a school committed to collaboration the principal is the most important element (Brownell & Walther-Thomas, 2002). Principals set the tone for acceptance of co-teaching as a service delivery model in their schools. School administrators are responsible for developing a model of co-teaching that is supported by quality research and practice (Friend & Cook, 1996).

### *Co-teaching*

Co-teaching is a specific special education service delivery model in which a general education and a special education teacher work together in planning, delivering, and evaluating instruction to a diverse group of students in primarily a single classroom setting (Cook & Friend, 1996). In this model special education teachers provide instruction, discipline, and support for students in the general education classroom. Ideally co-teaching teams share responsibility for direct instruction, curriculum development and/or modification, communication with families, and student evaluation. This service delivery model has become a popular alternative to resource room and pull-out service delivery. Co-teaching can draw on the strength of the general education teacher who is the expert with curriculum and the special education teacher who is the expert in providing the intensive, specific, and remedial instruction. Co-teaching involves shared responsibility and joint ownership for collaborative teaching by educators with different fields of expertise.

Friend and Cook (1996) defined co-teaching as “two or more professionals delivering substantive instruction to a diverse or blended group of students in a single space” (p. 156). The authors asserted that the roles and responsibilities of the general education and special education teachers should vary. They identified four key components of their definition: (a) two educators, (b) delivery of meaningful instruction, (c) diverse groups of students, (d) and common settings. In addition, the authors discussed five variations of co-teaching that teachers may adopt throughout the year as a way to meet both the needs of students and the instructional objectives. These five variations include: (a) one teaching/one assisting, (b) station teaching, (c) parallel teaching, (d) alternative teaching, and (e) team teaching. *One teaching/one assisting* is a technique in which one teacher takes an instructional lead while the other teacher moves throughout the room assisting and observing student behavior. The second variation, *station teaching*, has each member of the team working on a segment of the content with students rotating among stations. The third variation is *parallel teaching*. Each teacher is responsible for instructing and evaluating a group that has been divided into two heterogeneous groups. The fourth alternative is *alternative teaching* which allows one teacher to provide remediation or enrichment to a small group of students while the other teacher works with a larger group. *Team teaching* is described as the two teachers working simultaneously as they instruct the whole class. Each component has its strengths and weaknesses. Different instructional goals within the general education curriculum should drive teachers to select different components at different times.

The educational community has seen a growing trend to create inclusive opportunities for students with disabilities. It has never been acceptable to place students

with disabilities into separate programs solely on the basis of the child having learning and/or behavioral disabilities. A large percentage of students with disabilities who might have been misplaced in special education settings in years past are now receiving their special education services in the general education classroom. Although current research is equivocal regarding the outcomes of inclusion for all students with disabilities, proponents of inclusive practices assert valuable academic and social learning opportunities for all students. Students with and without disabilities can succeed in general education when supportive teachers, peers, administrators, specialists, and others work as a team to ensure that every child receives a meaningful and appropriate learning experience. Students with disabilities may receive benefit from the additional human and material resources that inclusive environments can provide (Klingner & Vaughn, 2002; Walther-Thomas, 1997). Professionals, too, report that they have gained from working in inclusive classrooms by claiming to have grown professionally as they collaborated with colleagues to meet the needs of their learning communities (Austin, 2001; Klingner & Vaughn, 2002; Walther-Thomas, 1997; Walther-Thomas, Bryant, & Land, 1996).

### *Leadership Practices*

A school administrator as an agent in promoting excellence in schools, maintaining quality services, and creating change must ensure that students are receiving an appropriate education in the LRE. Beninghof and Singer (1995) identified leadership attributes essential to accomplishing inclusive educational environments and best practices. These attributes include leaders who are driven by principle, guided by a vision, committed to encouraging others through the management of personnel and financial resources, and dedication to leadership by example.

Goor, Schwenn, and Boyer (1997) described essential beliefs, knowledge, skills, and reflective behaviors needed for effective leadership of special education. These authors concluded that many school leaders have never examined their beliefs. The authors stressed the need for more accepting beliefs that reflect a commitment to change. These would include the viewpoint that all children are part of the school community and can learn. Competent leaders recognize their limitations and their responsibility for searching out new information and developments in the field. They need to be cognizant of the law and changing regulations, recognizing that placement decisions must be based on individual needs as opposed to program availability and on knowledge of particular disabilities and best instructional practices.

Essential tasks for effective leadership of special education involve collaborative planning and decision-making, providing staff development, and advocating for effective instructional programs and service delivery models. In a collaborative school setting, staff works together to provide the best learning environment possible for all students. In order for staff to work together Goor et al. (1997) suggested that principals be active participants in special education programs. Principals should be involved in teacher and program evaluation and coordinate efforts for innovative materials, techniques, and strategies.

Crockett (2002) emphasized the need to have prepared leaders who are knowledgeable and skillful in supervising and evaluating special education. In preparing responsive leaders the author developed a conceptual framework for special education leadership. The five core principles of administrative practices are grounded in the interrelatedness of FAPE, LRE, and best practices. Ethical practice ensures educational

access and accountability. Individual consideration requires leaders to be respectful of the unique learning, behavioral, and instructional needs of students with disabilities. Equity under law ensures that leaders are cognizant of public policies. The fourth principle is that of effective programming so that leaders are skilled in supervising and evaluating educational programs that support best practices and positive results for all students. Lastly, establishing productive partnerships is critical so that leaders can communicate and collaborate effectively.

Schools considered to be effective reveal that no one factor guarantees both student achievement and professional satisfaction (Walther-Thomas, et al 1996). But rather many influences combine to support students and professionals (McGregor & Vogelsberg, 1998). Influences include shared leadership and family involvement, a school vision, comprehensive program planning, ongoing evaluation, and adequate resources. Collaboration is also mentioned frequently in the success of schools (Darling-Hammond, 1997; Slavin, 1995; Walther-Thomas, 1997; Walther-Thomas, Korinek, McLaughlin, and Williams, 2000). Friend and Cook (1996) referred to collaboration as a style of direct interaction that characterizes many types of group processes and projects. Idol, West, and Lloyd (1988) defined collaboration as an interactive process that enables people to problem solve. Walther-Thomas et al. (2000) stated that the unique and dynamic differences between team members are what makes collaboration more effective than individual efforts. Sharing different vantage points, knowledge, and strategies facilitates development of more creative and comprehensive solutions to complex problems.

Vaughn and Schumm (1995) considered practices that contribute to effective inclusive programs that are student centered with placement and service based on each student's needs. Placement should be centered on the student and determined only after the needs of the individual are identified. Successful inclusion requires the provision of adequate human and material resources. Lack of such resources, they point out, has been identified as a barrier to successful inclusive practices. Vaughn and Schumm recognized the importance and value of maintaining a continuum of services so as to meet the academic and social needs of all students. In addition, teachers and administrators must continually evaluate the existing service delivery models in the school, as well as develop and refine curriculum and instructional techniques. Offering ongoing professional development is a necessity. School administrators and teachers should also discuss and develop an inclusive school philosophy that serves as an anchor for a flexible service delivery model.

Gerber and Popp (2000) generated a set of recommendations to improve leadership practices for co-teaching. Strategic scheduling that considers classroom composition and teacher caseload and sufficient planning time allowing special and general educators opportunities to collaborate were recognized as essential. The authors emphasize the need for a continuum of special education services at all grades so that services are not disjoined from one grade to the next. Staff development for all personnel, including administrators, was emphasized as well as annual evaluation of the programs' effectiveness with results shared with the entire school community. Effective evaluation systems demand leadership, stakeholder participation, staff development, and technical assistance to ensure that meaningful data are collected, analyzed, and used

appropriately in making decisions (Creasey & Walther-Thomas, 1996; Tapasak & Walther-Thomas, 1999).

Beninghof and Singer (1995) stressed the flexibility needed by administrators in order to ensure program effectiveness. Recognizing the need for established common planning time they offer practical suggestions in the areas of planning, assessment, and instruction for administrators to put in to place. The suggestion for using substitute teachers twice a month would allow co-teachers time to collaborate. This is an example of how creative thinking can help deal with the challenges inherent in establishing common planning time.

Today's principal must demonstrate leadership in all areas of the educational organization. The principal is responsible for the daily elements of school activity, such as: (a) curriculum and instruction, (b) planning and assessment, (c) discipline, (d) facilities management, (e) community relations, (f) safety and security, (g) finance, (h) personnel issues, and (i) special education. Special education in particular demands much expertise and time from an administrator. Special education mandates have added heavily to the already awesome responsibilities faced by administrators. Educational leaders are directly responsible for monitoring and assuring compliance with all special education laws, policies and regulations at the federal, state, and county levels. Leaders must be competent and confident with their ability to effectively administrate special education procedures and programs at schools. Their tasks include complying with and monitoring (a) referral, (b) evaluation, (c) eligibility, (d) individualized education programs, (e) instructional placement, and (f) procedural safeguards for special education.

Leadership with all its responsibilities and tasks is essential to providing a quality education for all students. A distributed perspective on leadership argues that school leadership is stretched over the interactions of school leaders, followers, and their situation. Leadership practice is not simply a function of what a leader knows or does. Yet leadership practice is constructed in the interactive web of these leaders, followers, and their situation. The notion of distributed leadership involves multiple leaders, both administrators and teachers. Organizational routines and structures, material artifacts, and tools are a critical part of the school leadership. School leaders work with tools, routines, and structures that shape leadership practice. The tools and organizational routines along with other aspects of the situation are not simply components that allow leaders to practice more effectively; but rather they contribute to understanding the practice of educational leadership (Spillane, Halverson, & Diamond, 2004). The literature reviewed thus far emphasizes the need for leadership of special education to move from single decision making to shared decision making, from closed communication to open communication, from managerial practices to instructional practices and a need to understand the practices and functions of leadership.



## Leadership Tasks and Responsibilities of Co-teaching

<u>Preplanning</u>	<u>Scheduling</u>	<u>Maintenance</u>	<u>Community</u>
<ol style="list-style-type: none"> <li>1. Creating common visions and shared goals</li> <li>2. Defining instructional roles with the co-taught classroom</li> <li>3. Establishing work space for the special education teacher in the co-taught classroom</li> <li>4. Providing training for all staff and clearly define co-teaching program for the school</li> </ol>	<ol style="list-style-type: none"> <li>1. Assigning students to co-teaching classes</li> <li>2. Consideration of teacher caseload and classroom composition</li> <li>3. Creating appropriate teacher work schedules and adequate time for special education teachers in the co-taught classroom</li> </ol>	<ol style="list-style-type: none"> <li>1. Establishing sufficient planning for teachers</li> <li>2. Communication between teachers, admin. and parents</li> <li>3. Ensuring a continuum of special education placements</li> <li>4. Evaluating program effectiveness</li> <li>5. Providing staff necessary resources and staff development opportunities</li> </ol>	<ol style="list-style-type: none"> <li>1. Communication and collaboration with parents</li> <li>2. Recruiting teachers who are collaborative</li> <li>3. Training for teachers at the university level</li> <li>4. Ensuring compliance with IDEA; specifically FAPE &amp; LRE</li> </ol>

### Research Studies Addressing Co-teaching

This section of the review will analyze how leadership of the co-teaching service delivery model is being implemented to provide students with disabilities with an appropriate education in the least restrictive environment. First, the rationale for including studies for review is discussed. Next, a brief synthesis of the studies' purposes, methodologies, and sample population is provided to give the reader an overview. Then, the 11 studies are presented and critically analyzed. The review addresses three general conceptual areas: (a) co-teaching tasks and functions (b) task-enactment and (c) social and situational context for co-teaching. These areas serve as the organizational structure for the analysis and synthesis of studies in this section.

## Research Studies Included for Review

Specific parameters for the selection of studies for the review were set prior to searching the literature. First, studies were to be conducted in public school settings that were implementing the co-teaching service delivery model in any of the grades kindergarten through grade 12 because public schools are required to follow regulations imposed upon by IDEA. Second, studies were to address the implementation of the co-teaching model and leadership issues that served as barriers or facilitators to its success. Several studies were found that discussed student achievement and/or instructional techniques solely, but are not included in this review. Third, studies were conducted after 1990 when the mainstreaming and inclusive schooling movement was sparked and students with disabilities were beginning to receive a majority of their instruction in the general education environment.

### *An Overview of Studies Included*

Descriptions of the 11 studies appear in table form in Appendix L. The tabled studies are arranged alphabetically by first authors' last names. This table summarizes the following categories: (a) author and year of publication; (b) title of the article; (c) purpose of the study; and (d) methodology and sample used.

### *Purposes*

Researchers have studied various aspects of co-teaching. Some looked at the roles and responsibilities of the co-teacher (Fennick & Liddy, 2001; Klingner & Vaughn, 2002; Weiss & Lloyd, 2002 & 2003). Others examined factors influencing the co-teaching model (Austin, 2001; Phillips, Sapona, & Lubic, 1995; Trent, 1998) or analyzed benefits and problems with co-teaching (Nowacek, 1992; Welch, 2000). Three studies went a step

further and studied the co-teaching model in the context of the school (Baker & Zigmond, 1995; Morocco & Mata Aguilar, 2002; Walther-Thomas, 1997).

### *Methodologies*

The predominant methodologies used in these studies were interviews, observations, and review of records (Klingner & Vaughn, 2002; Trent, 1998; Walther-Thomas, 1997; Weiss & Lloyd, 2002 & 2003) or a combination of those and student performance (Baker & Zigmond, 1995; Morocco & Meta Aguilar, 2002; Welch, 2000). One study used survey methodology (Fennick & Liddy, 2001) and another used a combination of survey and interviewing (Austin, 2001). Two studies used interviewing alone (Nowacek, 1992; Phillips, Sapona, & Lubic, 1995).

### *Samples*

Studies collected data from teachers (Austin, 2001; Fennick & Liddy, 2001; Nowacek, 1992; Phillips, Sapona, & Lubic, 1995; Trent, 1998; Welch, 2000); while others sampled a combination of teachers and administrators (Klingner & Vaughn, 2002; Morocco & Mata Aguilar, 2002; Walther-Thomas, 1997; Weiss & Lloyd, 2002 & 2003). One study sampled teachers, administrators, students, and parents (Baker & Zigmond, 1995).

### Co-teaching Tasks and Functions

Analyzing leadership practice involves understanding how school leaders define, present, and carry out their tasks. Tasks and functions exist that are critical to establishing and maintaining a co-teaching instructional model. Leadership tasks such as teacher assignment and caseload, and ensuring common planning time for co-teachers to discuss curriculum and instructional issues are essential. In addition, leadership tasks involve

collaborative planning and decision-making, providing staff development, and advocating for effective instructional programs and service delivery models. Leaders should be active participants in teacher and program evaluation and coordinate efforts for innovative materials, techniques, and strategies. These co-teaching tasks and functions can contribute to the overall goal of establishing a co-teaching program within the school community. The following studies illustrate these distributed co-teaching tasks and functions.

Trent (1998) conducted a case study to report factors that influenced co-teaching. Data were gathered over a three year period from a suburban school district in the Southeastern United States. The participants of the study included a high school general education teacher and two special education teachers. Prior to implementation of the co-teaching model, the school served the students with mental retardation and students with emotional disabilities in self contained settings and the students with learning disabilities were provided either services in the resource room or received services by checking in with the special education teacher for five minutes twice a week. As a result of this less than ideal service delivery model, the school personnel designed a co-teaching model to implement at the school.

Data were collected through interviews, observations, and review of co-teaching materials. Nine team interviews and four individual interviews were conducted in two phases using open-ended and semi-structured formats. Over a two year period 23 classroom observations were done using an emergent approach to further analyze the setting and contexts discussed during the interviews. Co-teaching documents such as instructional modifications, study guides, and administrative memos were reviewed. The

first co-teacher team shared compatible goals of meeting the needs of their students and was supportive of each other. The general educator brought her experience and knowledge of the curriculum, and the special educator contributed curricular adaptations and organizational skills. The students with and without disabilities benefited from a smaller student-teacher ratio, curricular adaptations, and organizational skills learned. Both teachers appreciated the differing expertise of the other and thought co-teaching added to their skills and benefited their students. They shared common planning time yet competing priorities such as the special education teacher providing consultative services to other students often interfered. Both teachers stressed the need for more planning time and the desire for administrative support.

Without prior consultation the co-teacher team was dismantled and a new team established. This administrative arrangement led to a different co-teaching situation. These educators had differing teaching styles and were unable to coordinate their skills as had been done previously. Although the two teachers shared the same planning period, the special education teacher was often unavailable but why this was the case was not reported by the researcher. Both teachers believed that a more supportive administration might have led to better results. The teachers thought they should have been consulted regarding the establishment of their co-teaching team. In addition they were unclear as to their roles and responsibilities and felt that administration could have facilitated their collaboration efforts.

From Trent's (1998) description of the incompatibility of these two teachers, it is clear leadership was lacking in support of this co-teaching team. Data from interviews recorded illustrated that the teachers were either unable or unwilling to discuss their

concerns with one another. Perhaps a more supportive administration could have provided the guidance necessary to address these issues. An interesting finding indicated that whether or not a set planning time was established for the co-teacher teams, teachers rarely, if at all, co-planned. Additional responsibilities such as requiring the special education teacher to serve other students at this time prevented such collaboration. The leadership practices of facilitating collaboration, setting goals, and assessing progress appear to be absent in this setting.

A second study, conducted in northern New Jersey, investigated factors affecting co-teaching in nine school districts. Austin (2001) selected districts that had been using the co-teaching model and teachers that had been co-teaching for at least one semester. The researcher surveyed 139 teachers working from kindergarten through twelfth grade, and followed up with semi-structured interviews of 12 of the participants. Teachers co-taught in a variety of content areas including the sciences, social studies, math, and language arts. The survey was developed by the researcher to gain information from one of four categories: (a) co-teacher perceptions of current experience, (b) recommended collaborative practices, (c) teacher preparation for collaborative teaching, and (d) school-based supports that facilitate co-teaching. The semi-structured interview was used so the researcher could gain deeper insight with regard to the four categories. Teachers generally agreed that co-teaching had been a valuable professional growth experience even though only 28% of general education teachers and 27% of special education teachers volunteered to participate in the co-teaching model.

General education teachers reported an improvement in their ability to manage classroom behavior and to make curriculum adaptation. Special education teachers, in

contrast reported they increased their knowledge of the content. Although teachers expressed that they generally worked well together, appreciated each other's feedback, and benefited from working together, a majority of both general and special educators believe that the general education teacher worked more in the inclusive classroom than their special education partners. The researcher does not elaborate what more is being done by these teachers.

A majority of both special and general educators agreed they should meet daily to plan lessons. However, those who actually met daily to plan found the practice ineffective. Again the researcher did not elaborate on why the teachers felt the co-planning was ineffective. Although teachers valued the sharing of classroom management and instructional duties, a majority reported that such sharing of duties did not happen. A greater percentage of special educators believed that specific areas of responsibility should be established and maintained but once again a majority of teachers did not actually implement this practice. Scheduled planning time, administrative support, adequate supplies, staff development were perceived to be important. The results suggested, however, that these tools were not provided sufficiently.

It might be construed from this study that teachers and administrators did not collaborate when developing and assessing the co-teaching program nor did they problem solve when difficulties arose. Although teachers believed that co-planning was important a majority found it to be ineffective. The study did not capture the details of how and why co-teaching was perceived as ineffective. A qualitative study is needed to explore and investigate such elements.

Phillips, Sapona, and Lubic (1995) explored factors that contributed to co-teachers' working relationships. The researchers reported on 10 general and special education teachers' reactions after a full school year of teacher collaboration. The school was located in a rural-suburban Kentucky school district and served 375 students in kindergarten through grade 5. Students were grouped in multi-age and multi-ability classes in grades 1 through 4; however, in kindergarten and first grade students were taught in single-age classes. The school district's special education director mandated each school to initiate some form of collaboration but allowed specific decisions to be developed by individual teachers and principals.

As a result of the directive, the teachers developed the school's collaborative teaching models. It was unclear from the study what role the principal had other than just being supportive of the decisions made by the teachers. The principal who had no specific experiences of co-teaching was supportive of the initiative and both general and special education teachers reported feeling supported by his general guidance. The principal and all the teachers except one had never received any training on inclusive schools or collaboration models. Even without guidelines the teachers learned to develop their own methods, partnerships, and logistics for co-teaching. The teacher team decided to pair each special education teacher with two general education teachers, with the exception of one special education teacher who co-taught in one classroom all day. A year after implementing this collaborative model, 6 general education teachers and 4 special education teachers were interviewed about their experiences. The interviews were taped and later analyzed for factors that contributed to the co-teachers' working relationships. After analyzing the data the authors identified progressive phases that all



the co-teachers experienced. The researchers categorized the phases as such: (a) experiencing anxiety, (b) working out the logistics, (c) determining classroom roles, (d) sharing planning and curriculum, (e) recognizing and articulating the benefits of collaboration, (f) utilizing the continuum of services, and (g) evaluating the overall effort. Although most of the teachers progressed gradually through these stages, two teachers were unable to resolve communication, interpersonal, and philosophical differences and were stuck in the beginning phases.

Initially teachers reported anxiety related to having another teacher in the classroom who might be judging their job performance. They also found it difficult to establish their roles in providing instruction to the students. Lack of communication was a factor that contributed to role ambiguity and anxiety with co-teaching. The logistics of implementing the co-teaching model presented difficulties. Scheduling classes, number of students, their level of needs, and teacher partnerships had to be reworked to facilitate the program. The lack of common planning also became an issue and some teachers reported that it just did not happen and they adapted to the situation by making do. In contrast, other co-teacher teams found benefit with common planning and made the necessary arrangements to meet.

The early phases also included a certain jockeying of roles. Was there a leader? Can both teachers teach all students or be responsible for IEP objectives? Teachers eventually solved these problems as they began to become accustomed to each other's styles and were able to share information about students and negotiate routines. They discovered that flexibility was most important as their partnerships evolved. As the collaboration developed teachers began sharing the class planning and curriculum

decisions. At first, the time necessary seemed overwhelming to the teachers but eventually most found that it was essential and even enjoyable to discuss students' progress and instructional ideas. Teachers came to believe that they learned from each other and grew professionally. They reported a benefit from working with a peer.

According to the teachers interviewed the students benefited in several ways. Students had more teacher time given the new smaller student/teacher ratio in the classroom. Special learners no longer felt ostracized by being pulled out of the classroom. Friendships developed among students who had previously received services in a special education setting. Student behavior was also improved. The study concluded that all teachers involved basically believed that including students in general education was beneficial to all. Teachers reported that even the reluctant parents eventually favored this new collaborative model.

Maintaining a continuum of services was thought to be a factor in the success of this collaborative model. There were times when the teachers agreed that a particular student needed a different learning environment or a different instructional model. The teachers provided the model appropriate to the individual student and did not allow the new co-teaching model to deter the importance of maintaining a continuum of special services which addressed the individual needs of students.

The authors noted four factors that contributed to the co-teaching model. A lack of a specific collaboration model was seen as being one such factor since this lack of guidance from administration allowed teachers to develop a model of co-teaching that worked for them. Flexibility was another factor that contributed to the collaboration. Shared beliefs about learners and an enjoyment in learning together were considered

contributing factors. Although the teachers stated they felt supported by the administration it was not reported in the findings how they felt supported or what the actions taken by administrators were. Further study is needed to further investigate the leadership role in the support of a co-teaching model.

#### *Discussion of Co-teaching Tasks and Functions*

From the studies reviewed it is evident that certain tasks and functions exist that are basic to establishing a co-teaching instructional model. In some studies, the administrative tasks related to co-teaching were placed in the background and not developed as fully as those tasks and functions required of the teachers. However, it can be said leadership tasks and functions such as scheduling, creating sufficient planning time, and consideration of teacher caseload are considered essential in establishing and supporting this model. Communication between educators and maintenance of the continuum of special education placements and services are deemed necessary. These tasks and functions are directly linked to the role of instructional leadership and thus highlight the need for leadership in a co-teaching model.

#### *Task-enactment*

The roles and responsibilities of those implementing and supporting co-teaching are important to defining and understanding leadership practices. The co-teaching model introduces roles that are expanding to include new and different responsibilities. Ideally, co-teaching teams share responsibility for instruction, curriculum development, communication with families, and student and program evaluation. Leaders must be cognizant of these teacher roles and responsibilities and participate in comprehensive program planning, ongoing evaluation, and providing training and resources to facilitate

the co-teachers' changing roles. The following studies provide a greater understanding of these distributed roles and responsibilities.

Morocco and Mata Aguilar (2002) conducted an investigation of a schoolwide co-teaching model in an urban middle school that had been well established at the time of the study. The study was conducted in a culturally diverse middle school of 540 students in the southern part of the United States that had been using co-teaching as a service delivery model. Of the 540 students attending the school, 20 percent were students receiving special education services. The goal of the study was to understand how teachers engage in co-teaching within and across their interdisciplinary teams. The researchers concentrated on 11 middle grade co-teachers, all of who were relatively new to the teaching profession. Eight of the eleven teachers were general educators and the remaining three were special educators. The principal, the assistant principal, and two teacher leaders were also included in the study since they played key roles in implementing the co-teaching model in the school.

First the researchers set out to ascertain the school's vision and model of co-teaching, how the school has put the model into practice, and factors and challenges that surfaced. In order to address these research questions, the researchers conducted interviews with those who were involved in decision making of the co-teaching model. Interviews and member checks were conducted with the principal, assistant principal, two former co-teachers who recently were promoted to deans of students. The co-teaching teams of teachers worked with the same students for two consecutive years. The teams consisted of special education teachers and the content area classroom teachers. The principal and teachers decided to group students with disabilities in heterogeneous

general education classrooms. Before the inception of the co-teaching model students with disabilities were educated in self-contained settings. The administrators at the school felt that encouraging these students to build relationships and to feel a sense of belonging was paramount in importance. Each co-teaching team was responsible for developing curriculum units, assessing student performance, and making the appropriate arrangements for interventions for students with specific needs.

During the first year of implementation the school administrators and teachers met with outside consultants to discuss and establish the school's vision. The principal felt that professional development was critical in building the co-teaching model and organized research based training workshops that focused on individual learning styles. Training sessions, selected by teachers and the principal, included integrated thematic learning; life skills curriculum; and classroom management techniques. Common planning time was built into everyone's schedule, as well as additional time for teachers to plan instruction and write curriculum in alignment with the state curriculum, develop assessment tools, and discuss instructional strategies for students. From the beginning of the establishment of the co-teaching model at the school, the principal and the teachers collaborated in its development. At first 10 co-taught classes were created and each was taught by a general education and special teacher. In the following year the model was changed primarily because there were no longer funds available from the grant to support this service delivery design.

Consequently the school had to cut many special education teachers so the principal asked teams to volunteer to work with students with disabilities. The special education teacher in this model traveled with students from class to class and was not a

member of the team. However when the teams began to realize how valuable the special education teacher was for all students they began to include the teacher as a member of the team. During the next year, the administrators began to institute a schoolwide co-teaching model by placing students with disabilities in heterogeneous classrooms in all the teams. Every team would include one special education teacher. The administrators and the teachers believed that it was the schoolwide model that allowed for true collaboration to occur where the content knowledge and content pedagogy connected with the strategies to make the content accessible to all students. The special education teacher was a member of the team and taught with each member throughout the week. In this model the special education teacher was expected to demonstrate a minimum of three roles. First be present in the general education classroom with the students with disabilities, second understand students' learning needs, and third model for the general education teacher strategies to make the content accessible for all students.

As the schoolwide co-teaching model was into its second year of implementation, it was clear that co-teaching was not isolated to individual classrooms but was a part of the school's philosophy. All special education teachers shared common planning time with the team and participated in the development of curriculum and assessment planning. One special education teacher became the elected team leader. All teachers participated in staff development together and were involved in the selection of such activities.

The leadership practices such as creating a vision, providing staff development, and ensuring planning time that was established at the inception of the model provided the support the co-teaching model needed throughout the following years. Despite

funding being cut and a decrease in special education teachers, the principal and teachers continued to collaborate and accommodate to the resources available. This study provides an example of interactive leadership practices in a schoolwide model. A further study of a schoolwide co-teaching model is needed to understand how these leadership practices are shared.

Klingner and Vaughn (2002) spent seven years studying and working with one elementary school in a large, diverse southeastern school district. The researchers conducted and published several studies relating to inclusive school practices in this elementary school. For this particular study the researchers investigated the changing roles and responsibilities of a special education teacher from one of resource room teacher to that of a co-teacher. Prior to becoming a co-teacher, this teacher provided special education services in a trailer behind the school where all students with disabilities were assigned. Then the service delivery model for selected grades changed.

The administration in the school decided to implement a co-teaching model at grades 2, 3, and 4. The teacher became responsible for co-planning and instructing students with disabilities in the general education setting. In the following year it was decided by the school administration to extend the model to grades kindergarten, 1, and 6. This left grade 5 to remain as a pull-out model of special education delivery. This new co-teaching model was implemented at the same time as the growing emphasis on high stakes testing but the researcher did not report further on this aspect. Prior to implementing the co-teaching model, district administrators had met with the special education teacher to advise her to meet and rewrite IEPs so they would be in compliance.

It appears that the administration focused on students with disabilities as a group and not as individuals.

Klingner and Vaughn (2002) in this study spent significant time observing and interviewing the co-teacher teams and conducting focus group interviews. In addition, they observed and took notes from meetings with administrators and teachers to clarify roles and responsibilities. From these data the researchers established four categories relevant to the implementation of co-teaching: (a) assessment, (b) teaching, (c) consultation, and (d) interpersonal skills. In the area of assessment the teacher began to utilize a wider range of techniques to evaluate student learning than she had as a resource room teacher. In her role as co-teacher she became more familiar with classroom based assessments and was better able to develop curriculum based and authentic assessments. This method of assessment coincided with the movement toward high stakes testing. In regard to teaching, the change in instructional delivery presented new challenges. She was now expected to co-teach with a general education teacher, develop and implement instructional adaptations, provide supplemental instruction, and assist students with homework. Providing instructional adaptations was this teacher's main responsibility. The teacher felt pressure from administration because of high stakes testing to teach the general education curriculum and make it fit with the IEP goals.

The teacher received no guidance from administration and no training on the co-teaching model and was left wondering what was she was supposed to do. Adding to the confusion, she received mixed messages from district level and school-based administrators as to her exact role as co-teacher. This teacher adjusted by changing her role depending on the personality and philosophy of the general education teacher. Her



role was that of lead teacher in one classroom, shared control in another, and she only assisted specific students in a third class. The teacher learned that it was important for her to either take the lead or follow depending on the wishes of the general education teacher. She learned to cope with the inadequate work space she had in the general education classroom for instruction, materials, and her personal belongings. Ironically this work space was where many of her students received direct instruction in their areas of need. In the role as co-teacher, she was not provided with a substitute teacher for her students when she was required to complete administrative duties or when she was absent. However she had received the assistance of a substitute teacher when she was previously assigned to a resource room.

The participant of the study felt planning was important to the co-teaching model. At first the administration scheduled a 60 minute co-planning block for teachers to plan, but within a few months it was reduced to 30 minutes. Following the first year of implementation, the co-teacher team was provided no shared planning time and the special education teacher was provided no planning time at all. Instead, the teachers were paid overtime if they wanted to plan after contract hours but this proved difficult given the various responsibilities the teachers had outside of school. By the fifth year of the program, funding for planning outside contract hours was no longer available so teachers never met to plan collaboratively other than to randomly discuss a student issue. Although administrators had made co-planning a priority in the beginning, they decided it was not of importance in subsequent years.

According to Klingner and Vaughn (2002) this teacher demonstrated high interpersonal skills and a sense of responsibility and advocacy for her students. She was

admired by her colleagues and adjusted to the different classrooms in which she was placed. The researchers noted that the teacher helped change some poor behaviors demonstrated by her general education colleagues. It appears that the administration chose this teacher to spearhead the new model because of her skills and her experience as a special education teacher. However, it does not appear as though this teacher received the supports necessary to implement the co-teaching model. The co-teaching model was implemented recklessly without a plan and the supports needed to sustain it. For example, the teacher enjoyed one hour of planning time but the following year she had none. Individual student consideration was not a factor in the development of the model instead it was an all or none approach with a few grade levels left to be served in the pullout model. The study of this co-teacher underlines the importance of administrative support necessary. A further study focusing on leadership practice would help the educational community understand the roles and responsibilities that are needed to support a co-teaching model.

Weiss and Lloyd (2003) studied the roles of secondary special education teachers. These researchers looked at variables that affected special education teachers' actions and roles in co-taught settings as compared to their actions and roles in the special education classrooms. They interviewed 6 teachers and an administrator at the middle and high school levels in a rural area in the mid-Atlantic region. The teacher participants had either received workshop training from other teachers in the district or had experience with co-teaching prior to the study. All had received literature about co-teaching from the district administration.

The research consisted of 31 observations lasting 30 minutes each. Semi-structured interviews were conducted of the special education teachers on three occasions and of one administrator who acted as the IEP coordinator. The researchers reviewed documents related to the special education policy on integration and job responsibilities in the school district's handbook, and teacher journal entries were analyzed. The researchers used the constant-comparative method to build a grounded theory about teachers' actions and roles in both co-taught and special education classrooms. A grounded theory is developed as the researchers interpret actions and events from the data collected. The teachers felt that scheduling pressures affected their teaching roles. Scheduling issues and time constraints set by administration influenced the roles of these teachers. Many of the teachers were scheduled to participate in co-teaching in two separate classrooms at the same time. Some felt unprepared to teach the curriculum in certain subjects and thus were influenced by this inadequacy. Further, discrepancy of student skills led to differing instructional roles.

Weiss and Lloyd (2003) concluded that the co-teaching model was poorly implemented in this school district. The IEP coordinator and principals pressured these teachers to utilize co-teaching and supported them with literature. Additional pressure came from the community concerning tensions between high stakes testing and the desire of some parents to continue the co-teaching model for their children. The participating teachers reported they were generally satisfied with the program but they stated that they needed more information, better support, and special training. Of the six teachers interviewed, only the middle school teachers were given co-planning time and teacher schedules were difficult as sometimes they were expected to cover two classes at the

same time. The researchers felt that the administrators and teachers focused on the goal of participation in and access to the general education curriculum without enough thought as to the implementation.

Leadership for these co-teaching models failed to involve all stakeholders in the decision, design, and evaluation of the co-teaching programs. Teachers were told to co-teach, were provided co-teaching literature only, and given teaching schedules that were impossible to meet. The teachers reported a lack of training, a lack of role definition, and pressure from the community and administration. This study illustrates a lack of supportive leadership and an unclear understanding of their roles and responsibilities. A study focusing on the leadership roles and responsibilities is needed.

Fennick and Liddy (2001) conducted survey methodology to examine co-teachers perceptions of their responsibilities and the extent of their teacher preparation. One hundred sixty-eight general education, special education, and speech and language co-teachers were surveyed from 17 diverse urban, rural, and suburban school districts. General education teachers comprised 56.5% of the respondents, and the remaining 43.5% were special education teachers. Of the general education teachers, 62.1% taught at the elementary level and 53% of the special education teachers taught at the secondary level. English/language arts, reading, and math were the subject areas most frequently indicated as a co-teaching class. English/language arts classes were co-taught by 83 respondents, 81 respondents co-taught reading classes, and 61 respondents co-taught math classes.

The participants were asked questions about their responsibilities, preparation, and opinions about co-teaching. Teachers were asked to indicate responsibility for

particular tasks. Planning the curriculum and arranging the physical classroom environment were clearly seen as general education task responsibilities. Both special education and general education teachers saw themselves as more responsible for instruction and behavior management than their teacher partner.

Although 90% of the general and special education teachers stated that release time for planning was useful and essential, 48% of the teachers reported they had no scheduled common planning time. Only 22% of the teachers had one hour or more of scheduled planning time during a week. Only 53% of special education teachers had planning time scheduled during the school day and 47% did not. Of the general education teachers, 51% had mutual planning time and 49% did not. Sixty percent of elementary co-teachers had scheduled planning time and only 40% of secondary co-teachers had scheduled planning time. Lack of mutual planning time combined with disagreements about responsibility for instruction and behavior management suggests that collaborative teaching was not a shared process.

This study emphasizes the importance of ensuring common planning time for co-teachers and establishing roles and responsibilities for those involved. The researchers report that these essentials were not sufficiently available to those co-teachers surveyed. A further study exploring the roles and responsibilities of administrators in ensuring common planning time and providing necessary preparation is warranted.

#### *Discussion of Task-enactment*

The review of co-teaching roles and responsibilities indicates some challenges inherent to the co-teaching model as teachers' roles changed. Roles expanded to include new and different responsibilities and some teachers were better able to adjust than

others. In some cases general education teachers assumed the dominate role and special educators struggled with accommodating their role to different teaching styles. At times special education co-teachers expressed feeling like instructional assistants to the general education teacher and at times general education teachers expressed dissatisfaction with what they perceived as more of a workload. Space and time in the classrooms as well as comfort with the curriculum also influenced co-teachers instructional role. Responsibility dramatically changed when co-teaching was thrust upon co-teachers by administrative and community pressures. Teachers at the elementary and secondary expressed their need for more and better support as they adjusted to new roles and responsibilities.

#### *Social and Situational Context of Co-teaching*

Leadership practice is distributed over leaders, followers, and their situation (Spillane et al. 2004). In order to understand leadership practice one must go beyond an analysis of individuals and consider what those in positional and informal leadership roles know and do together. The followers influence leadership activity and are a composing element of the leadership practice. The situation is not external to the leadership practice but rather is a constituting element. The situation, which includes organizational structure and tools, is part of the practice and influences leadership activity. The following studies illustrate the importance of the situation and why it is considered an essential element.

Walther-Thomas (1997) conducted a three-year study of school-based teams in 8 Virginia school districts and reported on emerging benefits and persistent problems in developing co-teaching models. The selected teams had been recommended by district level administration as having innovative special education programs. The teams

included a principal or assistant principal, at least one general education teacher, and a special education teacher.

Researchers conducted observations, interviewed all 143 participants, and reviewed school documents. Teachers were asked about their co-teaching experiences. Administrators were questioned about their facilitation of co-teaching with emphasis on scheduling, co-planning time, and support. All discussed benefits and problems they encountered and there was a consensus among participants from both the elementary and middle school level.

According to teacher observations of students' behaviors and a review of their classroom work, benefits for students with disabilities and their classmates included improvement in academic performance, self-esteem, and peer relationships. Special and general education teachers reported increased professional satisfaction and growth, and personal support in their efforts to implement co-teaching. Both teachers and administrators reported increased appreciation of collaboration among colleagues.

Persistent problems which grew more serious over the three year period were identified by this study. They included time for planning, student scheduling, caseload, administrative support, and staff development. These problems expanded with time as co-teaching extended to additional classes. There was a wide discrepancy allotted to teachers for planning. Some received no time while others received as much as six hours per week. The researcher noted that planning time in elementary school was divided into smaller segments which made in-depth planning difficult. Middle schools had less difficulty with planning time due to the structure of their schedules, which have traditionally accommodated the need to collaborate. They tended to have two types of

planning sessions. One type focused on the co-teaching team's coordination of instructional efforts and specific activities. The second type dealt with general issues involving upcoming events and grade level issues.

Student scheduling presented difficulties especially when computer programs were utilized. The balance of students with different needs was important to the success of the program according to the teacher teams and this could best be established by a more labor intensive process. Some administrators supported this manner of scheduling while others were inflexible about assignment of students. Teacher caseloads also presented problems. Some special education teachers had exaggerated numbers of students that defeated the model. In some cases students were scattered throughout general education classes causing challenges for special education teachers to actually co-teach with general educators. More specialists were needed according to participants but few personnel were added or caseloads reduced. Some school teams were successful in getting central office administrators to provide an additional staff member. The administration of two districts decided to implement the co-teaching model using resource room teachers and reduced their caseloads but did not do the same for the self-contained teachers. The reduction of student referrals because of the co-teaching model was at first appreciated but with this reduction also came the reduction of special education teachers staffed at the school. Although Virginia public schools are categorical with regard to eligibility labels, some schools addressed the issue of limited resources by assigning caseloads across category lines.

Walther-Thomas (1997) concluded that administrative input is vital to the success of a co-teaching model. Problems indicated a need for more supportive administrators in



addressing the planning time, scheduling, caseload difficulties, and staff development. Schools where the principals were directly involved were the most successful over time. These principals supported co-teaching in their building by being an advocate, a team leader, and an official spokesperson. Central administration provided literature and personnel to conduct staff development. Nonetheless most participants expressed the need for more support even though their districts referred to them as the experts. Other less supportive administrators were influenced by competing education initiatives, cuts in funding, and negative press.

Although the principals supported co-teaching by advocating and being official spokespersons, these actions clearly were not enough to support the co-teaching model at the building level. Trying to use computerized program tools to assign and cluster students together solely by disability category, and a lack of sufficient planning and staff development created issues that were difficult to resolve, if not impossible.

This study presents an interesting perspective of elementary and middle school teachers within eight Virginia school districts. A study might prove valuable that focuses on one school and examines all co-teaching teams within that school and the leadership practice of positional and informal leaders. Included in such a study would be an exploration of the leadership practices, tasks and responsibilities, and the social and situational context.

In what has come to be considered a classic case study, Baker and Zigmond (1995) examined five restructured schools in five states that used the co-teaching service delivery model. The researchers set out to determine the nature of special education services provided to elementary aged students in select schools in Virginia, Pennsylvania,

Minnesota, Kansas, and the state of Washington. Data were collected during a two day visit to each site through interviews with two special education students, his/her parents, general and special education teachers, the principal, and special education supervisor for the school. The researchers observed students and teachers, reviewed student records including IEPs, report cards, and achievement level documents. Other documents reviewed included parent/student handbooks and local descriptions of the inclusive model employed in each district. Target students were given the Basic Academic Skills Samples (BASS) so that individual scores for each class could be compared to each target student's reading level.

Data from observations, documents, and interviews were coded into four areas: (a) context for inclusion, (b) model of inclusion, (c) role of special education teachers, and (d) educational experiences of students with disabilities. Preliminary analyses of the cases, including patterns depicted, were shared with peers and participants for peer review and member checks respectively. Next a matrix was developed to display data for each of the sites in the four categories. Common themes and important distinctions among sites were found and reported. There were key differences between each site. The situation differed in each setting. In one school the principal was compelled to maintain a set number of special education students so as not to jeopardize the number of special education teachers on her staff. In another school district only the fifth grades at the elementary and the middle schools were implementing inclusive practices. This same district specified in the student/parent handbook that the introduction to co-teaching at the fifth grade was designed to provide students with a transition from the self-contained model. The middle school continued with the co-teaching model however this service

delivery model was not available at the high school level. Another school system established co-teaching at the high school and then expanded this service delivery model to the lower grades in subsequent years. A third school utilized the teachers from the hearing and vision program as co-teachers to provide more inclusive practices for students, regardless of disability label. This arrangement allowed for co-teaching to occur in a greater number of classrooms. Various situations are presented in this study with regards to the diverse school-based and county policies.

The models of inclusion varied as well. Some schools only practiced co-teaching at certain grade levels and with specified general and special education teachers. When determining which students would receive instruction in the general education setting versus a self-contained setting, one teacher remarked that it was determined by whether the child required 3 hours and 10 minutes or less of special education service. In this case the child would receive services in the general education setting but a student with more time would receive special education services in the self-contained setting. Planning time was established by some co-teachers on a continuous basis and others planned sporadically. Students were either clustered together in one classroom or dispersed amongst the classes. Even student progress reporting was handled differently. In one school the principal stated that no student would receive a letter grade of 'F' and the letter grade 'D' was only given with her approval.

All sites required the special education teacher to fill multiple, complex roles as part of the service delivery model employed in their district. In one school two special education teachers shared one full time position. The special education teachers in the study were sometimes pulled from co-teaching responsibilities to handle administrative

special education responsibilities. In one school special education teachers worked in every classroom regardless of whether there were students with disabilities in it. This meant that the 1.5 special education teachers worked 47 half-hour blocks in classrooms in one week. In addition to this complex teaching schedule, one special education teacher had six half-hour planning periods scheduled so that she could plan with every grade level. At this school the focus of the co-teaching was on providing students with accommodations and not delivery of instructional learning strategies since the teacher's schedule had her scattered throughout the school.

At another school the teachers had no planning time and were consequently completely unfamiliar with what was going on in the general education setting. In this school inclusive services were provided to select students by having a special education teacher pull a group of students to instruct them using an alternative reading program. These reading groups did not always contain students with disabilities so when the state disallowed the use of the special education alternative reading program teacher to instruct any group of students that did not include at least one student with an IEP, the principal accommodated by splitting all the special education students into every classroom in the school so her preferred practice could continue. Then if the students with disabilities required additional support they would receive services in a pullout setting by the second special education teacher. Neither the two special education teachers nor the general education and the special education teachers had any common planning time. The principal stated that some planning time may happen over lunch.

In this study the five sites presented various situations that resulted in different co-teaching arrangements. Schedules, grading policies, or a desire for alternative reading

programs for general education students were influential in the implementation of the models. The authors also identified a need for leaders to establish a schoolwide effort involving every member of the staff. Distribution of students, scheduling, and adaptations in instruction were identified as essential of a co-teaching program. The researchers did not focus on leadership in these situations, they reported that decisions were made but not how these decisions were reached. All sites developed strategies to cope with what they perceived they needed. It would be interesting to know more about these leadership practices involved in adopting a co-teaching model. The study illustrates the need for attention to be paid to the situational factors when studying leadership practice.

Welch (2000) studied two co-teaching situations with a close examination of the preplanning process and teachers' subsequent evaluation. The researcher conducted a descriptive analysis of two elementary co-teaching teams in a suburban area of the Rocky Mountain region of the United States. The two elementary co-teaching teams selected for the study were from different schools within one school division but the grade levels were not specified. One classroom had 17 students, 6 of whom were students with IEPs. The other classroom had 3 of the total 17 students with IEPs. Participating teachers had completed video-based staff development training during the prior year. Each school's administrator participated in this same staff development activity. The training was divided into two parts. The first part discussed three school-based partnerships that are possible within schools: (a) team teaching, (b) teacher assistance teams, and (c) resource-consultant teacher. The video training showed other school sites and had teachers sharing the development and implementation of their selected partnership model. Following each presentation, the teachers participated in activities to share and reflect on what they had

seen. The second component of the video-based staff development provided the participants with guidance on how to conduct needs assessment to identify which one of the three building partnerships best fit their situation. In addition, the training provided the participants with tools on implementing and evaluating the selected partnership model. This action plan delineates the responsibilities and specifics of the program. Both sets of teams selected co-teaching as the partnership that best met their school needs.

Upon selection of the co-teaching service delivery model, the teams viewed the video segment specific to co-teaching and participated in a total of three hours of additional training to discuss implementation issues with the assistance of an assigned facilitator. This training occurred in the year prior to the actual implementation of the model. The facilitator met monthly with each team to discuss procedures, issues, or problems. The teams set a goal of 20% increase in student performance using curriculum-based assessments in language arts. The first school targeted reading fluency and word recognition, and the second school targeted comprehension, vocabulary, and spelling as their areas of focus. Each team established one 30 to 45 minute period to co-teach each day. Each school arrived at this decision after considering academic subject areas to be co-taught and the additional responsibilities of the special education teacher as a resource room instructor. The schools both began the co-teaching model during the second week of December.

The researcher gathered and analyzed data from teacher focus groups, weekly logs, student performance and instructional outcomes, as well as teacher reflections on the model. Each team spent more time planning for lessons at the beginning of each quarter than they did throughout the quarter. The first team spent for an average of 76

minutes in planning instruction per week, whereas the second team spent an average of 38 minutes planning each week. The first team's longer planning time may have been due to the fact that they had more students with disabilities.

Both sets of teacher teams used the lead-support instructional approach method more frequently. The general education teacher introduced the lesson and the special education teacher provided support where needed. Both co-teacher teams frequently used large group instruction as a way to group students but only used station teaching and small groups half the time. Each team met their instructional objectives of 20% gain in student performance in the area of language arts.

Co-teacher teams consistently reported a concern with regard to the amount of time that was needed to plan co-teaching. They did not feel that enough common planning time was allotted. The teachers reported that being in a co-teaching situation made it easier to handle unexpected interruptions because the partner could take over. One special education teacher complained that she was not always afforded equal contribution in instructional decisions. The teachers stated that because they had learned from the co-teaching experience they planned on continuing the model in the following year. Interpersonal issues were evident in one team which thought initially that they knew each other well enough to forego the preplanning dialogue. On the other team one special education teacher felt she did not have enough input and that her instructional expertise was undervalued.

The two schools that were involved in this study initiated co-teaching by involving the staff in a needs assessment survey, the selection of the model, and the preplanning stages. The study focused on the preparation of teachers and staff. The staff

were empowered to make decisions regarding the model of co-teaching they would adopt and the amount of time they would co-teach. However it cannot be determined from the study who and how leadership was provided. Further study might examine the roles and responsibilities and how these leadership tasks are distributed.

Nowacek (1992) sought to understand how special and general education teachers using co-teaching collaborate and what benefits and concerns they experienced in a rural school district in Virginia. The researcher interviewed one co-teaching team at the elementary level, one co-teaching team at the middle school level, and one special education co-teacher at the high school level.

At the middle school level, it was the special educators who initiated the co-teaching model with no support from administration. The teachers studied the master schedule and their individual caseloads to establish a co-teaching opportunity. They created classes by individually selecting students, paying careful attention not to exceed their decided upon 50% maximum of students with disabilities and two or three students identified as at-risk in one class. The special education teachers sought out general education teachers whom they felt would make good co-teachers based on their own personal judgment. The co-teachers did not establish roles and responsibilities with one another, yet agreed that the general education teacher was the content expert and the special education teacher was the expert in learning strategies. These co-teachers did not share common planning periods but rather planned during lunch, after contract hours, and sometimes during the actual instructional period. These same planning deficiencies occurred at the elementary level as well. The two elementary teachers initiated their own staff development by attending training on cooperative learning. After two years of



collaboration they decided it was important to develop a tool in which to evaluate the co-teaching experience and to assist teachers in establishing roles and responsibilities.

Leadership was provided by the teachers.

The special education teacher at the middle school was considering extending the co-teaching to service all grades at the middle school not just the two grades selected based on incoming students IEPs and expanding interest of general education teachers. Following the research study, the special education teacher at the elementary level took a leave of absence, which ended the co-teaching between these two teachers. The general education teacher did not anticipate participating in co-teaching that next year.

The co-teaching situation was different at the high school level. It was the administrator with special education background who encouraged the special education teachers to implement the co-teaching model. The administrator arranged for them to visit with teachers at a middle school who had been implementing co-teaching. The high school teachers were enthusiastic about their visit and appreciated the opportunity to dialogue with colleagues. The high school special education teacher agreed to co-teach but stated that at times she accepted that in a few classrooms some might perceive her as of being an instructional assistant. In addition she also realized that her lack of content knowledge put her in this same position in other classrooms. She expressed that she felt it was perfectly acceptable for her to not be the curriculum expert and this would not interfere with her ability to collaborate. Two years after the implementation of co-teaching for two years, the high school teachers made a significant change in service delivery. They decided to go to a more consultative model because they found shortcomings with the co-teaching model. The special education teachers felt there was a

lot of down time by having to spend the whole period in the class and they felt they could make better use of their time elsewhere. It would appear that the school team did not fully comprehend what was involved in a co-teaching model. The special education teachers decided they would try to make themselves available as questions and problems surfaced.

Lack of planning time, difficulties in scheduling, and the desire to choose co-teaching partners were reported by the teachers. Co-teaching was deemed effective by the participants but they also expressed concerns that the co-teaching model might replace all other service delivery models that are also needed. The only leadership reported was provided by the teachers. Initially it was the teachers who designed the schedule, determined which classes would be co-taught, assigned students to the classes, and selected individual teachers to co-teach. However the administrative leadership was limited. The co-teaching programs collapsed at two schools in the absence of sustained leadership distributed across the key players. This study emphasizes the importance of leadership in maintaining a co-teaching model.

#### *Discussion of the Social and Situational Context of Co-teaching*

The above research studies examined co-teaching models as part of the school-wide environment. In some settings attention was paid to the preplanning efforts to create a vision and shared goal, which formed a foundation for a co-teaching model. Collaborative leadership practices were observed between administrators and staff. In other situations teachers instigated a co-teaching model with little administrative leadership. A team approach in developing curriculum, assessing outcomes, and shared responsibilities were observed in some schools while in other schools preplanning was at a minimum. Teachers in these studies volunteered, developed their own model, and

introduced co-teaching to the community. Differing pressures such as competing priorities, funding, and number of students forced the programs to change. Despite different practices all participants mentioned the desire for more support and planning time. Leadership, either by positional leaders or informal leaders, was an important element in designing and implementing a co-teaching model.

### Conclusions

The research studies reviewed in this chapter present a variety of approaches to studying the topic of co-teaching. A majority of the studies used qualitative research methods including interviewing, observation, and review of records to examine co-teaching models. Other studies gathered data via survey methodology. Teachers were involved in all studies and administrators were included half the time. A synthesis review reveals certain essential factors related to the actors involved in leadership, the actions they took, the tools they used, and the interactions among these factors. The core elements of leadership practice in these studies included co-teaching tasks and functions, task-enactment, and social and situational context for co-teaching. It is clear from the review of the studies that school leadership for co-teaching involves multiple leaders, both administrators and teacher leaders.

The logistics necessary in implementing and maintaining a co-teaching model are essential tasks and functions for leadership. Scheduling classes for teachers and students, deciding the number and needs of students assigned to each class, and including common planning time for co-teachers were identified by the studies as vital elements to the program implementation. Difficulties in establishing these supports were virtually universal.

Some of the studies reviewed suggested approaches that ignore the individual needs of students with decisions not consistent with the concepts of FAPE and LRE. It did not seem clear that a continuum of special education services was offered when a school implemented the co-teaching model. The studies reported an inconsistency with grade to grade changes in service delivery models. One grade level may have initiated co-teaching and in the next year these same students returned to the resource special education model with evidently no consideration to their individual needs.

There were wide discrepancies in the preplanning stages. Some schools developed a common belief, educated their staffs as to what was involved, and offered training. Other schools mandated the co-teaching model without preparing staff or developing collaborative skills needed. The lack of preplanning led to problems in sustaining the program and providing a smooth transition for staff, students, and community. With funding changing from year to year long range planning was needed to ensure the resources for program continuance.

Essential to the co-teaching model are roles and responsibilities that are assigned or assumed by the administrators and co-teachers. The roles and responsibilities change dramatically when schools adopt a new service delivery model. Research indicates that these changes have not been anticipated or addressed sufficiently. The resultant confusion leads to dissatisfaction or controversy between special and general educators regarding workload. In some instances teachers reached accommodation by assuming the leadership role and taking on the tasks of implementation. Often administrative support was reported as being passive and limited to a remote role. Preplanning was cursory, scheduling presented conflicts, and sufficient common planning time was not available.

Leadership, though not a primary focus in most studies, remains a constant and important presence in each co-teaching model discussed.

### Needed Research

The research reviewed in this chapter reveals that the co-teaching instructional service delivery model has been studied primarily through qualitative research using mainly observation and interviews of teachers and administrators. These studies, most of which were published in the instructional research literature, have focused on co-teaching practices while offering some information on leadership roles and shared responsibilities between administrators and teachers. There was no study that focused primarily on leadership practice related to co-teaching, though the general importance of leadership was indicated often. To address the void, the present study had been designed to describe in detail, the distributed leadership practice related to the co-teaching service delivery model (Spillane et al. 2004) as described in chapter 1. This framework, based on a five year research project of instructional leadership in Chicago schools, analyzes leadership practice as distributed in the interactions of school leaders, followers, and their situation. It is the interaction of these core elements that was studied in order to understand leadership practice in a co-teaching model.

Recognition that the co-teaching model will continue to be adopted to fulfill the IDEA's requirements for FAPE in the LRE justified the need for a deeper understanding of its leadership practice. Literature presented roles and functions of leadership and described some tools used. However research was lacking in an examination of the distributive aspect of leadership and how it functions in a school situation. Consequently

more research was needed to determine the dynamic role leadership plays in the co-teaching model.

The present study set out to examine the leadership practice of the co-teaching service delivery model. An exploration of the practice of leadership beyond the roles, strategies, and traits of individuals was conducted. A qualitative research study investigating the how and the why of leadership activity based on the situation and the artifacts used gave an integrative understanding of such leadership practice.

## CHAPTER THREE THE METHODOLOGY

This chapter begins with an overview of the methodology of this study. It then addresses the assumptions and rationale for a qualitative design. Following this section is a detailed description of the overall procedures used for this study, focusing specifically on data collection and data analysis procedures.

### Overview of the Methods

The implementation of the co-teaching service delivery model is providing challenges to those who are committed to the education of students with disabilities. Many schools are using co-teaching as a way to provide students with disabilities an education in the general education setting. Co-teaching, involving the cooperation of general and special educators, seems to be a service delivery model that has the potential to meet both FAPE and LRE requirements with the practical solutions. A review of studies indicates that challenges inherent in this model need to be addressed. Although the potential benefits of an educational environment where two professionals collaborate and co-teach may appear ideal for many students with disabilities, the literature suggests concerns that cannot be ignored by those who supervise and evaluate instructional programs.

Both teachers and administrators reported difficulties and concerns surrounding the implementation of co-teaching. Issues such as co-planning time, scheduling, teacher caseload, classroom composition, teacher and administrative attitude and knowledge of inclusive education, and administrative support can have an impact on inclusive

education. If these concerns are not addressed by teachers and administrators the educational community may witness a greater number of students with disabilities isolated from their age peers (Kauffman & Hallahan, 1995).

Teachers involved in co-teaching often report increased feelings of worth, renewal, partnership, and creativity (Friend & Cook, 1992). Yet teachers also voice dissatisfaction with the process, indicating poorly defined role descriptions, lack of clear expectations and assignments without consultation, IEP developments and factors that influence the placement of services, and difficulties with implementation issues. Common sense would indicate that instructional leadership would be crucial to resolving these problems. Yet research is lacking on the topic of instructional leadership practices of co-teaching.

Spillane et al. (2004) distributive perspective presents leadership practice as an interaction between leaders, followers, and the situation. The tools and artifacts are essential to understanding the practice and must also be studied. But as described in chapter 2, the literature reviewed in this study considered, in isolation, the traits of individual leaders, the situation, and what they did to implement and support co-teaching. None of these studies addressed/viewed leadership practices as it relates to tasks and functions, task-enactment, and social and situational distribution of task-enactment. Therefore, the purpose of this study was to examine instructional leadership practices related to effective instruction through co-teaching service delivery around the central ideas: leadership task; task-enactment; and social and situational distribution of task-enactment. The distributive perspective framework was a guide in making sense of the instructional leadership practices related to providing instruction through co-teaching



service delivery. Data collected through interviews, observations, and documents provided insight into the instructional leadership practices related to co-teaching.

The overall research question guiding this study was: What are the leadership roles and practices related to providing instruction through the co-teaching service delivery model? Subordinate questions embody components of the distributive leadership perspective in addressing the following issues:

#### Research Questions

5. Who are the personnel responsible for providing instructional leadership for a co-teaching model?
6. What are the professional responsibilities and roles of these instructional leaders related to the co-teaching model?
7. How do instructional leaders carry out these responsibilities as it relates to co-teaching?
8. How do factors in the school environment support or inhibit them in providing leadership for co-teaching?

The research literature in the leadership of co-teaching is sparse, yet; co-teaching is considered an acceptable service delivery model and studies indicate important issues related to establishment, implementation, and support. Therefore it was important to investigate the leadership practices as they relate to co-teaching. This study is intended to contribute to a deeper understanding of the instructional leadership practices related to providing instruction through co-teaching. It is expected to be useful to school personnel in instructional leadership positions who are implementing co-teaching so that better decisions can be made with regards to its support and success.

## Procedures

This section begins by describing the assumptions and rationale for a qualitative design. It then describes the procedures for obtaining permission from the school district and the university, the setting selection, and the participant selection. It also provides an explanation of the data collection and analysis procedures that were used to conduct this study.

### *Assumptions and Rationale for a Qualitative Design*

Qualitative research allows the researcher to make knowledge claims based on constructivist perspectives or participatory perspectives (Creswell, 2003). The significance of qualitative research is unified by the researcher's fundamental research question-why? In comparison, the researcher carrying out quantitative research will ask how many or how widespread? The qualitative researcher isolates and defines categories in order to comprehend and learn, whereas the quantitative researcher determines the relationship between categories already isolated and defined prior to the research. Strategies such as phenomenology, grounded theory, ethnography, and case study have been identified in the field of qualitative research (Creswell, 1998, Tesch, 1990; Denzin & Lincoln, 2000; and Merriam & Associates, 2002).

Recognizing that the co-teaching practice can fulfill the law's requirement of providing an appropriate education in the LRE, and how widespread it is as a practice, warranted a deeper look at how it was being developed and nurtured by educational leadership. The existing research revealed some of the issues surrounding the implementation of co-teaching and focused on the perspective of teachers. Concerns that were raised indicate the fundamental influence of the leadership role and the need to

understand leadership practice that envelops the co-teaching service delivery model. The studies however did not directly focus on the leadership practices. Consequently more research was needed to determine the leadership practices as they relate the co-teaching model.

A qualitative research study was conducted to explore the practices of leadership in co-teaching. The present study set out to examine the leadership practices of the co-teaching service delivery model by investigating the how and the why of leadership activity based on the situation and the artifacts used. Co-teaching from the perspective of those who evaluate and supervise, and those who implement it necessitates an exploratory and explanatory inquiry so an empirical inquiry was necessary. This study was most suitable using qualitative research. The research design for this study was a cross-case analysis within an elementary school. Each co-teaching team was considered a single case with similarities and differences explored across other cases. Multiple case designs have clear advantages and are considered more compelling (Yin, 1994). Case study is best suited when investigating the process, context, and making discoveries which allowed this methodology to answer the research questions.

#### *Type of Design*

The focus of this study was to examine instructional leadership practices related to instruction through the co-teaching service delivery around Spillane et al. (2004) central ideas. The analysis focused the observations and responses of administrators and teachers related to the leadership practices of the co-teaching service delivery at the elementary level.

The methodology for this study was a case study of the leadership practices related to co-teaching. Case study is an exploration of a case or multiple cases over time through a detailed, in-depth data collection using multiple sources of information (Creswell, 1998). One elementary school with two co-teaching teams at the lower grades (K-4) and two co-teaching teams at the upper grades (4-6) was selected for the study.

An explanatory case study was conducted and data were collected in the following ways: (a) face-to-face interviews with district and building level administrators and the co-teacher teams from the school; (b) observations and field notes from on-site meetings and visits; and (c) review of documents (county's policies and regulations related to service delivery, 'principal policies', staff development materials, school and county memos, teacher and parent handbooks, school website, data collected from school profile, and meeting agenda minutes).

### *The Researcher's Role*

The researcher using qualitative research may argue that another human being is the only instrument that is sufficiently complex to understand and learn about human existence (Lave & Kvale, 1995). Being the primary research instrument, it was important for the researcher to understand the perspectives of those involved, uncover the complexity of human behavior in context, and present a holistic interpretation of what was happening. The implication is that the educational leadership community will benefit from qualitative research being performed as field research based on interaction between the researcher and the individuals studied.

This researcher is a former special education teacher of 10 years who has provided service delivery for students in both separate special education settings and in

co-teaching settings in various elementary schools in Virginia; served as the department chair at three elementary schools; and currently an assistant principal responsible for organizing and implementing staff development for the school to be better able to serve students in the general education setting and, responsible for supervising and evaluating numerous special education services, including autism, emotional disabilities, speech and language, and learning disabilities. These vast experiences and insights afforded the researcher the opportunity to study this topic from a qualified perspective.

As an employee in the school district in which the study was conducted, anonymity was maintained for all participants and information was not disclosed as to the school site in the study. This point was emphasized to the participants so that they could feel at ease to share and discuss. There were sensitive issues that surfaced related to teacher and administrator performance, student accountability, and legal issues related to placement and programming. The use of a researcher's log was employed to describe emotions and reactions experienced while on site visits.

The importance of making use of multiple strategies of validity is recognized (Creswell, 2003). The issues of triangulation, member checking, and peer review are addressed later in the quality section of this chapter.

### *Gaining Access and Entry*

Prior to conducting research in the selected school district, a research proposal was submitted to the Department of Educational Accountability. The proposal included a brief summary, background and introduction, methodology, instruments, participants, data collection, data analysis, and time lines. Permission from the school district will

remain on file with the researcher. Additionally, approval was obtained from the university's Institutional Review Board (IRB).

Following permission from the school district and IRB, contact was initiated with the special education resource specialist who oversees the special education programs in the school site that was selected. A letter describing the purpose of the study and the data collection procedures necessary to complete the study was sent to the school's administrators and co-teachers of the selected site (Appendices A & B).

### *Setting Selection*

The setting for this study was a large suburban school district of 163,534 students located in a Mid-Atlantic state. The district consists of 136 elementary, 22 middle, and 25 high schools, as well as 45 alternative schools and programs. Providing students with disabilities an appropriate education in the least restrictive environment is one of ten strategic district targets which include building a schools capacity to serve a greater number of students with disabilities. Therefore each school in this district maintains this goal as a focus and consequently participates in county and school staff development to build on their capacity to serve students with disabilities.

Of the schools in the district, one school at the elementary level was identified for the purpose of the study. The school system is organized into eight regional areas. The school shares the same special education resources, including personnel and professional development opportunities as the other elementary schools in this region. Each school in the region is implementing co-teaching as a service delivery model for students with disabilities. Teachers in this school system have been implementing the co-teaching

method of service delivery for several years. The school division has not adopted any one method of co-teaching.

### *Participant Selection*

Participants in the study included one district office administrator, the building level administrators, and the co-teaching teams from the school. Purposeful sampling was employed in order to study an information-rich case in depth. The purposeful sampling targeted school leaders responsible for implementing the co-teaching instructional model and co-teaching teams who provide instruction through the co-teaching model. The focus was exclusively on co-teaching leadership practices at the elementary level to allow for easier comparability within the case analysis.

Criteria for the selection of the case included all of the following:

1. Co-teaching, as defined in the literature review, was a method of service delivery in the school with at least two co-teaching team at the lower grades (K-3) and two co-teaching at the upper grades (4-6).
2. The school's co-teaching program was a recommended model by the school district's Teacher Collaboration Services Program for county teachers to observe.
3. At least one administrator had been a leader in the school for at least four years.
4. Co-teachers have taught together using the co-teaching service delivery model for one or more years.

In addition, administrators and co-teacher teams exhibited a willingness to participate in the study.

Initial contact was made with the selected school by meeting with the school's principal to discuss the study. A follow-up letter was sent (Appendices A & B).

#### *Assurances of Confidentiality*

Each participant received a letter inviting their participation in the study and signed giving permission for their involvement. Participants were assured total confidentiality and the opportunity to change their minds at any time during the process. An ethics protocol and participant release agreement is contained in Appendix E.

#### *Issues of Entry, Reciprocity, and Ethics*

Respect was demonstrated to the participants of the study. Informed consent forms were obtained from all participants, outlining their right to withdraw at any time, the right to ask questions, and the purpose of the study. Respect for the site visited and a low profile was maintained while minimizing interruptions during the site visits.

#### Data Collection Procedures

Data were collected through interview, observation, review of documents, maintenance of a field work journal, and a researcher's log. Participants were interviewed separately.

#### *Means of Collecting Data*

A variety of data collection instruments were used to ensure better understanding and greater credibility of the findings (Merriam, 1998). The variety of instruments used allowed a comprehensive perspective and crosscheck of information. Data were collected at each site by way of interviews, observations, review of documents, demographics survey, and journal notes. Initially a demographics survey was sent to the three



administrators and eight teachers to complete. Analysis of data began with the initial collection of data.

*Interviews.* Semi-structured face-to-face interviews were conducted at the site with the administrators and the co-teachers. According to Merriam (1998) interviews are the best technique to use when conducting an intensive case study of a selected few individuals. Interviews were conducted separately with each administrator and with each co-teacher. Interviews lasted an hour and were scheduled at the convenience of the individuals. The questionnaire guide was open-ended to allow for emergence of topics. Each interview was taped and transcribed for data analysis by the researcher. A review of the literature, my own knowledge, and the distributed leadership perspective guided the development of the interview questions. An administrator's questionnaire guide is contained in Appendix F and the co-teacher questionnaire is contained in Appendix G. A district level administrator questionnaire guide is contained in Appendix H.

*Observations.* Observations are a valuable data gathering tool in case study as they occur in the natural field and provide a first hand encounter with the phenomenon of interest (Merriam, 1998). An observation was conducted in the beginning of the study by taking a tour of the school building. This allowed me to explore issues around classroom and space design, and location of special education classrooms. Additionally observations were conducted of planning and scheduling meetings. An observation guide is included is contained in Appendix I.

*Review of documents.* Documents should be reviewed when it appears they will provide even more data that may not be yielded from other sources (Merriam, 1998). County's policies and regulations related to service delivery and a review of 'principal

policies' that existed, staff development materials, teacher schedules, school and county memos, teacher and parent handbooks, school website, data collected from school profile, and meeting agenda minutes were reviewed.

Administrators and teachers were asked to maintain notes for a couple of weeks so that they may record issues that developed and their response to them.

*Administrator and teacher demographic survey.* A demographic survey was designed and was electronically mailed to participants for their completion. Careful consideration went into the design of the survey so as not to ask information that could be obtained elsewhere. The survey is contained in Appendices C & D.

*Fieldwork journal.* Field notes were maintained and reviewed at the end of each site visit that contained things seen and heard. The journal contained insights, questions, ideas, and decisions made during the study.

*Field testing.* Selected teachers and administrators responsible for ensuring and providing an appropriate education through a co-teaching model served as consultants. They were provided with the purpose of the study and data collection procedures. Each consultant was provided proposed questions to be used during the interviews. Suggestions were provided to help clarify the questions to be asked of the participants. During the exchange, I practiced listening unobtrusively, not active listening, taking notes as necessary, and using planned prompts as necessary.

#### *Data Analysis Procedures*

Consistent with qualitative research, data collection and analysis were conducted simultaneously. Merriam (1998) affirmed the interactive nature of data collection, analysis, and reporting. A qualitative design is emergent. The researcher usually does not

know ahead of time every person who might be interviewed, all questions that might be asked, or where to look next unless data are analyzed as they are being collected (Merriam, 1998).

Data were analyzed working inductively from the particulars to more general perspectives to derive themes or categories (Creswell, 1998). One way to conduct an inductive analysis of qualitative data is the constant comparative method (Glaser & Strauss, 1967; Lincoln & Guba, 1985). In the constant comparative method each new category of meaning selected for analysis is compared to all other categories of meaning and grouped (Maykut & Morehouse, 1994). Because it is a continual evolving process, the constant comparative method was chosen as the process for refining categories and deriving themes for this study.

#### *Addressing Quality*

A case study is a singularity that is chosen for its interest to the researcher and readers of the project, and not because it is a typical example. Therefore, issues of external validity are not relevant. Lincoln and Guba (1985) provide the concept of “trustworthiness” as the measure of a case study’s truth. Trustworthiness defines the extent to which the conclusions make sense and are an accurate representation of the research. Professionals want to be assured that the results are trustworthy and that the transferability, dependability, and credibility have been addressed throughout the study. The next section will describe the procedures used in the study to establish the trustworthiness of the results.

*Transferability.* Traditional concepts of reliability and validity do not apply to case study research (Bassegy & Guba, 1985). Validity in research ensures that a study is

measuring what it purports. Reliability ensures that the research methodology could be replicated and that it is consistent throughout the study (Merriam, 1998). However transferability is critical in a qualitative study since it is the reader who determines whether the results can be applied to their situation by reflecting on the setting, participants, procedures, and analysis strategies. Readers of this study will be able to determine the extent to which findings can be applied to their context through detailed descriptions.

*Dependability.* Lincoln and Guba (1985) provide the term, trustworthiness, to address the issue that the researcher's conclusions make sense and are an accurate representation of the research. Multiple sources of data collection allowed for continual opportunities to verify the data from one source to another. For example data from interviews with administrators were verified with data from interviews with teachers. Data from interviews were corroborated with data from observation and vice versa.

*Credibility.* The interview questions were field tested with individuals similar to those in the study. Lincoln and Guba (1985) and Creswell (2003) speak of peer review as a strategy to maintain quality. Peer review in the data analysis process helped with testing emerging themes and conclusions. Additionally, participants of the study were allowed to view the data and make corrections. Member checking was a critical technique for maintaining credibility (Creswell, 2003). Participants were asked to comment on their interpretation of the data. This ensured accuracy of findings by allowing participants to review the accuracy.

### *Data Management*

This research study produced a tremendous amount of data. It was through analysis of the data that meaningful themes and understandings developed. This study sought to describe and explain the leadership support of the co-teaching service deliver model. This phenomenon can only be addressed by looking discretely at all the parts within the context of the whole. Analyzing the data demanded a thorough and comprehensive approach.

Data were analyzed using a multi-case, cross-case method (Yin, 1994). For this cross-case study there were two categories of analysis: (a) within case and (b) cross case. Data were separated and analyzed first by case and then across the co-teaching cases. Using this method, themes are examined across cases to discern themes that are common to all the sites (Creswell, 1998). Categories were refined and themes derived using data from interviews, observations, and document analysis created a detailed description of each case.

## CHAPTER FOUR PRESENTATION AND ANALYSIS OF RESULTS

The research conducted in this study provides a description of the leadership roles and practices related to providing instruction through the co-teaching service delivery model in one elementary school. This chapter summarizes the overall findings from the administrators, special educators, and general educators.

This chapter begins with a description of the school site selected and the demographic information collected from all participants. The description specifically provides information about the school site and the educational background and experiences of the administrators and teachers.

Immersion in the data to determine leadership roles and responsibilities of co-teaching guided the data analysis. The chapter begins with a summary of each case looking at the key elements of tasks and functions, task enactment, and the social and situational context for co-teaching. A cross-case analysis, comparing and contrasting themes that emerged from each case in relation to the research questions is presented. The chapter will conclude with factors that influence leadership of co-teaching.

As the findings of this study are reported throughout the chapter, codes have been established so that quotes can be attributed to the groups. Data sources are referenced in the report using codes that identify the types of source (T – interview transcript; O – observation; D – document) and participants (SE – special educator; GE – general educator; Admin1: principal; Admin2: assistant principal; Admin3: pyramid resource

specialist); followed by the numerals that identify the case and line number of the transcripts or field notes.

### The School

Eleanor Roosevelt Elementary School, built in 1952, is located in a suburb of a major metropolitan area. It is situated in an area of mini strip malls and highway construction. Eleanor Roosevelt is a Title 1 school that is proud of its diversity and low teacher turn-over rate. The staff functions as a school-wide professional learning community (PLC). The school uses a responsive social curriculum which enhances the academic curriculum. Of the approximate 400 students over one-third receives English Speakers of Other Languages (ESOL) services. The students represent 35 nationalities and 26 different languages. Eleanor Roosevelt has changed over the years from a predominantly middle class population to one with 48% of its students receiving free and/or reduced lunch, a federal measure of poverty in the public schools. Despite its diversity and poverty rate, Eleanor Roosevelt has continued to raise test scores during the last three years. The school is fully accredited by the state and has met the guidelines of the No Child Left Behind legislation in every subgroup.

In addition to having learning disabilities and speech and language services, the school offers non-categorical (NCE) services for students of the surrounding area. Seventeen students receive learning disabilities services while twenty-one students are served in the NCE program. Of the students with disabilities who participated in the state and federal assessment program all successfully passed for reading and math. Six special education teachers serve students in the NCE and learning disabilities programs.

## Profile of the Participants

Demographic information was collected from participants including educational background and experience. Table 1 provides this information.

Table 1 – Demographic Chart

Participants	Current School Assignment	Years at Current School	Years of Experience in Education	Degree
Case 1 GE	Gen Ed Gr. 5	4	10	MA
Case 1 SE	LD Gr. 5	7	7.5	MA
Case 2 GE	Gen Ed Gr. 2-3	8	11	MA
Case 2 SE	NCE Gr. 2-3	10	10	MA
Case 3 GE	Gen Ed Gr. 4	3	3	MA
Case 3 SE	LD Gr. 2-4	19	31	BA
Case 4 GE	Gen Ed Gr. 1	2	13	MA
Case 4 SE	NCE Gr. 1	17	42	MA
Admin 1	Principal	5	13	BA – General Ed Special Ed MA – Reading Ed.D.- Ed. Leadership
Admin 2	Assistant Principal	2	11	M.Ed.- School Admin BA- General Ed Special Ed
Admin 3	Special Ed Admin	6	20	M.Ed.- School Admin BA- General Ed Special Ed

### Case 1: Ann and Stacy

#### *Tasks and Functions*

Ann, a special educator, and Stacy, a general educator, have been a co-teaching team for the past three years. They feel they have developed an effective co-teaching partnership over time. “It has taken us three years to feel we have got it down. Stacy and I



can read each other well. I used to call them my kids, my seven kids in the room. Now they are all our kids.” (T/SE/1/6-8) “Last year it was much better but this year has been just the best year.” (T/GE/1/19-20) Ann has been teaching at the school for several years prior to Stacy’s arrival. When the general education teacher that Ann was initially partnered with resigned a new teacher was needed. At that time Ann was afforded a leadership position in the interview process that resulted in the selection of Stacy.

We have a lot of high standards and our interview questions get down to the nitty-gritty of it. One of the interview questions that I developed was a question about collaboration and teaming because it is really important to me. How do you know you are on a team and not in a group? It is really important. We didn’t just want to hire anyone. It wasn’t just to find a match for me but also a match for our school. (T/SE/1/17-20)

At the beginning of their co-teaching relationship, Ann was unwilling to relinquish control of the planning, instruction, and assessment components. “Stacy in her first year melded into my style because I had to set up the room. I set the classroom rules. I made the expectations and set the bar for what I was doing. And actually I was doing most of the teaching and Stacy was watching for awhile.” (T/SE/1/13-16) Ann’s history at Eleanor Roosevelt Elementary School determined Stacy’s role to be subservient. Stacy accepted Ann’s role of expert but felt squeezed out of all decisions relating to instructional planning and behavior management. “Ann knew the ropes plus she’s sort of a jack of all trades, an expert in just about everything in school. Ann was good to work with that first year as I was finding my way around but at the same time we did clash a little bit.” (T/GE/1/13-16)

Stacy was left to observe from the side lines for most of their first year together. “The first year was a little rocky. We didn’t know our roles. I’d never worked in any kind of team thing before.” (T/GE/1/9-11) Although Stacy felt uneasy and inadequate in this role she did not feel she should go to administration for guidance. Ann on the other hand was thrilled with the situation since her previous co-teaching experiences had afforded her neither input nor decision-making authority. These experiences in which Ann felt powerless led her to exert as much control as possible. “Co-teaching is not just your show and it’s hard. A lot of people want their own classroom and they want their own things. Part of me wants that too since otherwise it’s not your show and it’s hard. I have very definite ideas of how I think behavior ought to be handled. I have definite ideas on structure and homework and study policies”. (T/SE/1/80-84) This experience of feeling like an instructional assistant led Ann to take control and dominate the co-teaching classroom.

I always felt like an assistant in my previous teaching experiences. The kids would even say to me, “Are you a teacher?” Parents would question me, too. Now it’s funny, more parents will call me than my teammate because I am the more assertive of the two of us as far as our personalities go. And Stacy will hang back and is more soft spoken. (T/SE/1/47-51)

Administration considered breaking up the team. After their first year together administration was concerned about this team and whether it was truly collaborative. Administration approached Stacy and Ann separately to assess the situation. Stacy remembered:

I think administration thought we didn't necessarily want to be together. I don't know why. The principal thought Ann might be a little over bearing. The principal may have felt a little like she was trying to help me out a bit because she was saying, "You know if you don't want to be with Ann next year...?"

(T/GE/1/72-76)

Ann reported: "Administration kept trying to break us up. I kept feeling pressure. They would say things like, "Ann, don't you want to use your expertise with someone else?" And I responded, "No, my teammate and I haven't had time to work out these kinks yet." (T/SE/1/146-149)

This implied threat caused both teachers to reflect and examine their roles and responsibilities. Through this analysis, the team redefined their relationship and agreed to collaborate and share in decision-making. Stacy recalls: "You build that system and it's like an art. I'm already looking forward to next year. We have all these great ideas about what is definitely working and things that need to be improved." (T/GE/1/120-122)

Administration recognizes the need to continually evaluate existing co-teaching teams to ensure each educator is assuming their responsibilities while also supporting each other. The principal expressed a concern about the differing roles:

Definitely there should be an equal amount of responsibility although they have different things they are responsible for. And in general we have that happen. This co-teaching team is unique. I almost think the special educator views herself as the general educator. The special education teacher does a bigger share of the presentation, the lecture, and engaging part of the lesson than the general education teacher. (T/Admin1/1/82-87)

After three years of co-teaching, Ann and Stacy describe their roles and responsibilities as evolving. They discuss the curriculum and redistribute their teaching roles so that each feels empowered as teachers. They feel their relationship is one with an equal distribution of leadership. Both teachers feel competent and take pride in what they view as a successful co-teaching situation. Ann shared:

You take responsibility for failing together and winning together. Stacy and I went over and reviewed our SOL scores and took personal responsibility for the whole fifth grade class...we got eighty something percent. But last year we got one hundred percent. My teammate didn't look at me and say 'oh those are your kids'. My teammate and I want to be the model class that parents want for their kids. (T/SE/1/285-291)

Ann and Stacy identify trust as crucial to the development of their collaboration. "It took Stacy and me a long time to get to that trust place. For example, I trust that when I have a behavior plan for one of my students and if I were not present to implement it, I trust that it will be followed by my teammate." (T/SE/1/102-105) Ann and Stacy have their own styles yet share similar educational and classroom management philosophies. This basic commitment leads them to give more time to developing a blend of styles.

Stacy reflected:

So I had some ideas, and Ann already had a lot of good things in place, and just figuring out who wants to do what is essential. Do we take turns teaching language arts, do I teach math one day you teach math the next day? Do I teach it all and you walk around? Ann is such a good teacher and she is so good with the kids it would be, in my opinion, a crime if all she did was just support and quietly

help because they all benefit from her. Ann's very entertaining and very knowledgeable. She identifies well with the kids and so she's great with them. So what we've done is ironed it out and made it such that we can both share all roles. (T/GE/1/36-44)

They liken their partnership to that of a marriage with their level of trust allowing for greater collaboration and honesty.

It becomes a marriage. I don't know if Ann mentioned that. It's not just words. It kind of has to be, in the sense that you give a little and you take a little. You have to try. You responsibilities and you can't just get mad...I don't know. It's like a marriage. (T/GE/1/83-86)

Similar feelings are shared by Ann: "Stacy jokes around that her boyfriend and I make the perfect husband. He is there for all the fun stuff and I'm her emotional rock. Stacy can count on me." (T/SE/1/313-315)

#### *Task Enactment*

Ann credits planning activities as essential to laying down the foundation for a successful co-teaching model. She attends and participates in decision making at the student grouping meetings where the composition for next year is decided. "You have to really think about class placement...our school spends a huge amount of time on it. We do class placement the last couple of weeks and I am not kidding there were nine people in the room with us." (T/SE/1/29-32) Ann also attends IEP meetings at the end of the year for students moving up to her and Stacy's class so that the service delivery model best reflects their co-teaching arrangement.

A lot of the times I go to their IEPs at the end of fourth grade so the parents meet me. I explain the difference from our model and the other co-teacher's model. A lot of those kids had the same co-teaching in second and third grade. It is the fourth grade model that is hard to explain; that in order to service them you are pulling them out. I think our school is moving away from that pullout model.

(T/SE/1/232-236)

Both Ann and Stacy value and schedule common planning time. "Stacy and I will literally get up on Saturdays and go to the gym and then spend four hours doing report cards or our assessments. We also spend a lot of time outside of the classroom just trying to get it together." (T/SE/1/156-159) They meet as a professional learning community (PLC) with their grade level teammates. Ann and Stacy also have established common planning times that they built into their weekly schedules. They feel they need this extra time assessing both the students and their own teaching. Ann reports:

We have a PLC time which is a planning time. We assess the students and that could take the whole time. It depends on the student, but we assess together and look where we are going. Tuesday is math, Wednesday is language arts, and Thursday is PLC as a whole team. Also, my teammate and I plan outside of school and in the mornings. (T/SE/1/130-139)

During their second year together Ann and Stacy were assigned a combination fifth and sixth grade class. They stated that planning with both sets of grade level teammates from fifth and sixth grades was challenging if not impossible. They felt excluded and were not involved in the decision making with either grade level. "Last year Stacy and I were between two grades and we didn't really feel a part of fifth grade, and

we didn't feel a part of sixth grade." (T/SE/1/67-69) Although both acknowledge how difficult it was to teach a combination class, they recognize some benefits.

If there is a bubble at a grade level and we don't have enough special education students and because we like to do inclusion you have to make sacrifices. It kind of works really nicely for those special education kids who are immature. For instance my sixth graders who were immature did really well with the fifth graders who were more mature. (T/SE/1/25-29)

The combination class allowed for the less mature special education students in sixth grade to be with the more mature fifth grade students. In addition it allowed for smaller class size and also allowed Ann to co-teach with only one general education teacher.

Administration recognized this team's dissatisfaction and discontinued the combination class the following year. "Planning and teaming was a challenge for them and we had to look at another way to schedule the groupings for those two grade levels." (T/Admin1/1/95-97)

In Ann and Stacy's classroom every effort is made to service the special education students in the general education setting. Ann's level of commitment to the co-teaching model meant that she resists the pullout model but recognizes that it is needed occasionally.

I can still do pullout in my room. I take a small group in the hallway or I take a small group to another room. I pulled out for math; half my group went and half stayed with the general education teacher. I pulled for SOL prompt writing...and after we were done with the SOL we transitioned right back into the room. The students wouldn't question why they were leaving. We were just going to go to a

quieter place. But I was their teacher. It wasn't like 'oh here comes that special teacher to get you'. The students just went because a quieter room sounded good to them...it wasn't weird to them. (T/SE/1/213-222)

### *Social and Situational Context for Co-teaching*

The situation and organizational structure strengthened Ann and Stacy's co-teaching practices and allowed them to build a solid relationship. Their concern each year that administration will separate them compels them to reevaluate their roles and tasks. The roles that were already established by Ann at the inception of their partnership have evolved into a trusting, collaborative working arrangement.

Common planning time and a schedule allowing Ann to spend a majority of her day in the general education setting resulted in greater teaming. Administration took advantage of this arrangement and freed Ann's instructional assistant to work with the general education students in another classroom.

In some instances we pulled the special education IA from the co-teaching classroom, as she was sitting watching instruction, and put her in another general education classroom even though there were no special education students in that room. So that way the IA would be more active with instruction. This did not sit well with many people...but in the long run this had a huge benefit to instruction. (T/Admin1/210-215)

Ann acknowledges the benefit of sharing her IA with another teacher but is concerned that it impacts her instruction in the co-teaching setting.

When my teammate and I were doing science my instructional assistant went over to the other general education classroom because the other fifth grade teacher had



all the ESOL kids with no support. I am not going to have three adults in our classroom so I would rather know that the other general education teacher is over there making use of the IA. It makes it hard on me and Stacy sometimes since I can't do writing with twelve special education students by myself. There is no way. Some of my kids can't get started by themselves. But other times when Stacy and I are doing science interactive notebooks I can handle it. So we worked it for this year but I don't know what the scenario will be for next year with the child who has health needs. (T/SE/1/270-279)

The combination class Ann and Stacy had in their second year allowed Ann to be totally available to her students. This alleviated student behavior problems that she had experienced in past years when she was not available due to scheduling conflicts. Additionally, Ann's skill and talent in working with behaviorally challenged students allows her to support those students in the classroom who were not identified. "There are other kids who don't have an IEP that have behavior plans. Stacy and I somehow got the ADD class that needs a lot of focus." (T/SE/1/224-226) In their second year together Ann and Stacy felt excluded from both grade level teams. However this same organizational arrangement actually worked to unite the co-teachers. Ann and Stacy learned to adapt as a team.

Stacy and I needed all fifth and sixth grade teams to have the same behavior plan because we were right in between with the combo. No matter which room we walk in, whether the team uses stars or checks, we don't care just decide which one. It was kind of radical planning to have two grade levels doing the same thing. It worked and now they still use the same system. When you are at team

meetings more often you get to be a part more and know what is going on. For me I hate feeling like I am out of the loop. One of our teachers got there at 6:45 a.m. and the other stayed after school so it's like...maybe if I stay after school a few days I'll find out what they are doing because they were meeting and planning. Another group stayed late and ordered pizza but I have a life and I am not staying. (T/SE/1/379-389)

The physical environment and human resources available are factors in Ann and Stacy's creation of a co-teaching environment. Their classroom allows both teachers individual desks and space for groupings. (O/1/12) A pullout classroom that is shared with another special educator is available and is located near the general education classroom. (O/1/15) Ann had worked with the same instructional assistant for five years. They worked well together and Ann was able to rely on this instructional assistant's support and experience. However this year Ann is assigned another instructional assistant with whom she struggles.

I have an instructional assistant which is a whole other form of collaboration which works nicely sometimes and not nicely other times. My instructional assistant last year, we went to training together...if I suggested something she was on it. The IA I have this year is like 'I show up to the room at 9:00 and leave at 3:35 and that's my contract' mentality. She took the last week off because she is getting ready to go away...who takes the whole last week of school to get ready to go away? That does affect the team. She doesn't understand that you don't get into a power struggle with an emotional disabled student. Every day I had to

intervene. I had to have that conversation six to seven times before I realized she doesn't get it. (T/SE/1/397-406)

## Case 2: Casey and Lee

### *Tasks and Functions*

Casey and Lee have been a co-teaching team for five years. Previous to co-teaching together both taught special education in a self contained setting and were dissatisfied and frustrated in this role. Lee recalls:

We both taught self-contained classrooms and we were both frustrated. Everyday where you teach in a self contained classroom at the end of the day you walk out emotionally and physically exhausted. And you think 'how am I going to do this tomorrow'. Casey had the same situation. (T/GE/2/14-18)

As they took classes outside of school and began to get to know one another they brainstormed the idea of co-teaching together and presented this vision to the principal and the pyramid resource specialist.

One year Casey and I became friends and we started thinking about stuff and we just got together and realized that the kids coming up would be the perfect group of kids to try it with. And we went to the principal and our pyramid person and they said go for it. Casey and I have been doing it ever since. (T/GE/2/18-21)

As a result of this co-teaching initiative, alternating positions were introduced. With both teachers holding professional teaching licenses in general and special education, one teacher serves as the general educator while the other acts as the special educator. They agreed that these two roles would alternate every two years.

My teammate and I are both dual certified. We usually go on a two year cycle. I have been a special education teacher for the past two years and before that I was the general education teacher. Lee and I have been doing this for five years so next year will be our sixth year. We flip back and forth. (T/SE/2/1-4)

Although their roles and responsibilities change on paper, Casey and Lee often find themselves assuming many of the same responsibilities they had under the alternate title. They both take active roles in the planning, teaching, and assessment of the students. Both co-teachers share in the development of the IEP, provide services to all students regardless of role, and attend trainings together.

Special education always has more paperwork. My teammate is great about helping out and she helps with the progress reports and she is so familiar with it. At my last IEP she was like, let me run this one. At the IEP table Lee just ran the IEP. Another time we got an out of state IEP and we just wrote it together. We did the great beginnings coaching program and that has helped our relationship, team, and partnership because we do everything together. (T/SE/2/186-192)

At the start of each school year Casey and Lee establish their roles and responsibilities. "Lee teaches second grade math and I teach third grade math. I do all the science and she does all the social studies." (T/SE/2/184-186) They divide the responsibilities evenly amongst one another and assess at the end of the year to determine its effectiveness. Throughout the years they vary their responsibilities for the instruction based on their teaching needs.

Casey and I assess the students in the beginning of the year and we split into groups. Because Casey is the special educator she took the lower end and tried to

meet with them every single day. I, on the other hand, had seven groups and I was lucky if I could meet with them once a week or twice at most. But that is what we agreed upon this year because we thought these kids need to be met with more often. In some years we split them in half but this year we decided that wasn't the best since we had kids that needed it every single day. Casey met with kids individually but I met with kids in groups. (T/GE/2/119-127)

The team functions by learning from one another. Casey observes improvement in their teaching and learning that she attributed to their strong relationship. Lee is the more organized yet controlling individual. Whereas Casey is the more laid back one who was not as organized as she would have liked. As the relationship developed they also grew and began to function cohesively and adopted one another's positive characteristics.

My teammate said in the beginning that it was big for her to give up control. I said 'Ok' and that I would be mindful of that since I know this is hard for Lee. We shared our fears. And I am much more laid back. I said to Lee I'm fearful of not living up to your expectations or not being as tidy and organized because she was the label queen and had baskets for everything. I was organized but not to the extent Lee was. Now that we have been together for five years Lee is a little bit more laid back and I think I am a little bit more organized. We help each other with our area of need and balance it out. (T/SE/2/73-81)

They compare their relationship to that of a marriage expressing that you have to trust and be willing to give up control. "Lee and I just got really lucky finding each other. It is much like a marriage. It is the relationship. You have to trust each other and grow comfortable with each other." (T/SE/2/72-75) Casey even took it a step further to say it

would be like an arranged marriage if the co-teachers did not have a choice with whom they worked.

We had a co-teaching situation in our school that bombed and I could have told you it would bomb. The personalities were so mismatched! There are so many principals that say you are going to co-teach with this person and it doesn't work. It is like an arranged marriage. When teachers get to pick their co-teacher it is meaningful to them because it's their idea and their initiative. (T/SE/2/147-151)

### *Task Enactment*

Active participation in student placement meetings is an important task for these teachers. Casey and Lee believe it is essential that they have input in the student classroom composition to ensure their continued co-teaching success.

Since we started doing co-teaching Casey and I requested that we be able to participate in these meetings to protect our class. Because every single teacher in this school says, 'Oh, he's coming to you...you got to get him.' Because they think since there are three people in our room we can get every low kid in this school. We can't. If we do that we are defeating the purpose of an inclusion room.

Casey and I feel strongly that we have to protect our class. (T/GE/2/89-93)

Otherwise Casey and Lee believe all challenging students would be placed in their class making the classroom composition unbalanced. Other co-teacher teams are not privileged to participate in classroom composition meetings as was this team. Casey and Lee recognize their good fortune.

We always go to the meetings that are in place to form our class next year and most teachers don't go to those. And that makes us feel a little privileged. But

otherwise if we don't go and protect our class everybody puts their kids that are needy in our class. (T/SE/2/87-90)

The development of the IEP is another task deemed critical by this co-teaching team. Casey and Lee generally provide no special education services in a special education setting.

This year with the kids we have, we have none of them with special education hours in a special education setting. None of them have I pulled into the fishbowl [the name they have given their other classroom], until recently because it is the end of the year, because of their needs or they needed a smaller environment.

With the two educators and the assistant in the room we are always in small groups. They don't really need that accommodation because it is already in place.

The kids would go to the fishbowl but it was with general education kids. That is a non-IEP kid in that room and that makes it a non-special education setting.

(T/SE/2/31-39)

Consequently, that arrangement has to be reflected in each student's IEP document. The special education students new to the class most often require this addendum to the IEP to fit the co-teaching model taught by Casey and Lee. These same students have to have their IEP altered again when they move into the fourth grade co-teaching team who make use of the pullout service delivery model. Lee states that if one of her students moved to another school she would addend the IEP knowing their co-teaching situation was unique.

That's why it is kind of tricky. If those kids left our school I would addend the IEP for some of them. We would have to change some of those hours. Even for

the kids staying at our school next year, IEPs might need to be changed but we are trying to do a similar co-teaching situation with another team. (T/SE/2/40-43)

Casey and Lee schedule planning time with both the second grade and the third grade teams. In addition they plan weekly during specials (art, music, and physical education) but also consult throughout the day. They credit the amount of planning time as a factor in their success.

Our kids go to one special, even though we are a combination class. So we have a common planning time every single day. That's key. Now I think it could still work if co-teachers did not have a common planning time every single day if they had at least an hour or two a week. Common planning time cannot be PLC meeting time with other teammates. It has to be with just the two of you.

(T/GE/2/155-163)

Administration compliments this team's planning, "I would say that the two/three combination truly sit down together and look at the SOL they need to cover and go through what they have done before and is there anything new out there. I would say this just because of the way the instruction comes out...so amazingly polished and ready that they must plan that way." (T/Admin2/2/124-127)

Casey and Lee view themselves as a cohesive team based on trust and respect for each other. "My teammate and I connect and bounce off of each other and we can teach at the same time. We kind of finish each others sentences." (T/SE/2/164-166) Decisions are reached collaboratively concerning the division of teaching responsibilities. For example, in order to manage their combination class, Casey and Lee divide the social studies and science curriculum. Previously it had been overwhelming for both to teach



science and social studies for two grade levels. Never does one teacher feel the other is not doing their fair share of the caseload. Decisions are made to best support each other. “We have always presented ourselves as the two teachers in this room and whatever one says the other will support.” (T/GE/2/68-69)

### *Social and Situational Context for Co-teaching*

The social and situational context work to support this co-teaching team. Casey and Lee are the pioneers who brought their ideas to administration and then introduced this model to staff and parents. Their confidence in co-teaching allows them to successfully introduce this educational model to parents. They are provided two classrooms so that students can be moved between groups with greater ease.

Administrative support and shared decision making allows the team to make leadership decisions in the planning, scheduling, and maintenance of their co-teaching situation. They loop each year in their combination classes so that they could service the same students for two years. Casey and Lee maintain that having a combination class allows them to be successful in their roles as co-teachers since they could serve more special education students in this co-teaching environment. They also recognize it has the added benefit of creating smaller class sizes for two grade levels. Casey shared:

When we have the combination classes it makes smaller classes at second grade and smaller classes at third grade. When one year we didn't take kids from second grade because we had enough students from third, second grade was then awful...it was hell that year for those kids so we kind of learned from that mistake. (T/SE/2/180-183)

Casey and Lee spearheaded the co-teaching efforts in the school. It was these two teachers who approached administration and requested the opportunity to do a co-teaching model.

We are trying to set co-teaching up at every grade level. Since Lee and I started our co-teaching situation it seems each year we are getting closer to people doing it at every grade level which is cool and exciting. The fifth grade team started it two years ago and they have some of the kids Lee and I had and that team is doing quite well with that. (T/SE/2/118-121)

They laid a strong foundation within their own co-teaching team but are not willing to venture out to work with other individuals. They desire to stay together as a team and are not ready to establish new co-teaching partners.

It would be very hard to change co-teachers. We have been asked to. People have said, "Since you are so good why don't you split up and spread the wealthy." My response to that is if it ain't broke don't fix it. We are so happy doing what we are doing and we know the chance of finding someone else that we mesh with is not likely. (T/GE/2/59-63)

The administration has great confidence in this team. As a result of this trust, Casey and Lee are given greater independence to make their own decisions. Casey and Lee feel strongly that co-teaching is best for teachers and students and gently encourage their less enthusiastic colleagues of the benefits.

We talk about co-teaching all the time ...how Lee and I think it is better for us as teachers and better for the kids. We sell it all the time. I have had a couple of conversations with the first grade self contained teacher about doing co-teaching

saying you and X [general education teacher] work so well together. I think she would be an amazing co-teacher. I mentioned it to the special education teacher and that's all I can do is plant a seed. (T/SE/2/207-219)

### Case 3: Ellen and Katie

#### *Tasks and Functions*

Ellen and Katie are new to the co-teaching model and are into their second year working together. Katie is a second year general education teacher while Ellen is a veteran special education teacher. Both say they share the same educational philosophy. Katie reported:

We both philosophically come from the same background where worksheet is kind of a four letter word. You know, it's much more hands on activities, and experience of learning and all those kinds of things so we come from a very similar background. So I am really lucky. (T/GE/3/185-193)

However Ellen, comfortable with the traditional service delivery model of providing resource services and pullout-support for her students has a hard time changing her role to co-teaching. She is wedded to providing service delivery in a separate small group setting. Ellen defended her service delivery model.

Our school has had the pullout for years and nobody has ever said not to but there's definitely been in the last two to three years that push towards let's not do pullout anymore. And I really resisted it because I've always felt like there are some kids that need that pullout. There are smart kids and their self-esteem is in the toilet because they sit there and they look at their classmates and they know there's no way they're anywhere near what they should be doing and they feel

stupid. So when you pull them into that small setting it's very much everybody is doing what they need to work on kind of attitude. The special education students don't see what the other kids in the general education are doing. They only know what they're doing and are not comparing themselves to the other students.

(T/SE/3/212-226)

Teachers and administrators did not fully realize the importance of scheduling and planning until a majority of the year had expired. "In reality we did a poor job of setting up Ellen's schedule. She was pulled in too many directions and could not put her total energy on the co-teaching situation. We have changes in store for next year."

(T/Admin1/3/224-226) This resulted in disjointed teaching with many pullout situations.

Planning for this co-teaching team did not take into account Ellen's many other responsibilities. Because of this, Ellen defines her role as a balancing act.

You can't be in four places at once. When you're helping one group the other group in the other grade is diving and falling apart. So basically that's why I've been doing the pullouts because ok if I'm doing an inclusion class who's going to cover these kids in the third grade that couldn't get into the combination co-teaching class because there's too many kids in there. (T/SE/3/23-27)

Ellen serves two separate general education classes and is also responsible for any kindergarten, first, second, or third grade student who become eligible throughout the year or do not fit into existing co-teaching arrangements. Ellen also serves as the local screening chairperson for the school. This responsibility interferes with her scheduled science co-teaching. "Ellen has about 100 too many things on her plate already."

(T/GE/3/206) Ellen feels an enormous responsibility to ensure that the students make

academic progress and also improve their self esteem. To meet this responsibility she feels compelled to service students in a small pullout setting to achieve these goals since she is not convinced this can occur in the general education setting.

Katie acknowledges that she and Ellen are still in the beginning stage of forming a cohesive co-teaching team. “We’re so at the beginning stages.” (T/GE/3/39) Katie expresses that her role as a co-teacher can be developed if both teachers share the same philosophical beliefs about children. Ellen is relatively optimistic for her future co-teaching with Katie since she gets along with her. “I find myself being more open to going and trying that inclusive thing because I am comfortable with Katie.” (T/SE/3/282-283) The assistant principal reflects on Ellen’s professional growth after the special education team attended a retreat together: “Ellen really got a lot out of that retreat. She has said to me the retreat was interesting and that she needs to explore more about co-teaching. So I think she got the message.” (T/Admin2/3/79-82)

The relationship Ellen and Katie have with the instructional assistant worked to the team’s advantage. Katie enjoys a positive relationship with the special education instructional assistant. Katie views it her responsibility to ensure that the instructional assistant be viewed in the role of teacher. She also holds the role of disseminator of information. Materials and instructional strategies are shared with Ellen during planning meetings.

### *Task Enactment*

Grouping students is a key focus for the team. The two general education fourth grade teachers and Ellen divide the students into three groups for language arts and math. What the team perceives to be flexible grouping in reality is a high, medium, and low

grouping based on an assessment in the beginning of the year. “Our grade level team has this kind of flexible grouping in math. Ellen took a math group so that we could meet the needs of the kids who were able to do fourth grade math but at a much slower pace. As a result Ellen ended up with a group of 12 to 13 kids in the learning lab five days a week with two teachers which really is probably one of the smartest things we could do.”(T/GE/3/73-78) Who Katie referred to as the second teacher was actually the instructional assistant. “In our school we call instructional assistants teachers. The term IA is somewhere on a piece of paper.” (T/GE/3/90-91) The students are assigned into hierarchical groups and stay in those same groups for the remainder of the year. And because Ellen has the lower group with as many as 13 students, both special education and general education, she requires her instructional assistant to support her in the special education classroom.

We move any kids from both of the classrooms that need extra help because the kids didn’t move quite as fast as the other two groups. There were two adults in our group so we could split them into smaller groups. My IA and I took the kids that took longer to learn and some of them were general education kids who just struggled with math. (T/SE/3/74-78)

Ellen cannot function without her instructional assistant in the pullout setting. This group in the pullout setting is the lowest performing group. Students never move out of that group but rather students are added whenever the team feels a student is not progressing in the medium or high groups. The team perceives a benefit from grouping students but in reality organizes students into permanent tiered groups that allow no flexibility.

Although common planning time is seen as an important component of co-teaching, Ellen was not always available to attend due to her additional responsibilities. “Ellen didn’t come to the planning meeting on Thursday mornings but did as frequently as she could. The other general education teacher and I passed on the information to her at the 3:00-4:00 meeting.” (T/GE/3/219-221) Consequently planning was not collaborative and information was delivered. The fourth grade team did meet for an hour each week to discuss language arts, math, and students. Katie and the other general education teacher updated Ellen, the ESOL teacher, and the reading teacher with curricular plans. Katie and the other general education teacher would set the instructional pace and assigned struggling students to Ellen.

The other general education teacher and I met a lot with Ellen and Peggy for math to share any math materials that we had. We also shared any math ideas that we had. What ended up happening probably after about the first month is our two groups started to pull ahead of Ellen’s group. So the other fourth grade teacher and I were able to say we did this with decimals and it was great or we did this with decimals and it bombed horribly so don’t try it. So that was kind of a benefit that we were a bit ahead of them to be able to share the use of materials or manipulatives and then give it to them to use as well. (T/GE/3/112-119)

The special education instructional assistant was a vital member of this team. She has served in this role with Ellen for ten years. Katie was dependent upon the IA and viewed her as another teacher in the classroom. “Now last year was my first year teaching. I didn’t know the magic of Peggy [IA] because I didn’t work with her that closely last year. I had no idea, but this year I have said it to Peggy everyday that I

couldn't have done this year without Peggy.” (T/GE/3/252-255) The schedule for the IA was designed so that she would be in the classroom for social studies. Ellen assigned the instructional assistant to work with her in the pullout setting for language arts and math. Ellen reported that with so many needy students she could not assign her instructional assistant into the general education classroom for language arts or math. That meant special education students who could have actually stayed in the general education classroom were pulled. “I have a couple of kids who do not need pullout for reading but we had so many needy kids that we pulled them out. I couldn't spare myself or my instructional assistant to go into the general education classroom.” (T/SE/3/71-73)

#### *Social and Situational Context for Co-teaching*

The school's overall philosophy to provide co-teaching situations for all students was not realized for this team. “Looking at the fourth grade co-teaching situation I can see we have some improvements to make.” (T/Admin1/3/245-246) Several obstacles impeded this co-teaching situation. Ellen's philosophical conflict with the administration and some of her special education colleagues caused her angst.

It would be hard to do inclusion at three different levels. I had a friend that left special education because when this inclusion started she like me was working in four different classes so when she was in one class the other three teachers were like ‘where were you...where have you been...I need your help...I can't handle these kids.’ And that one year drove her so crazy she just went into teaching general education. I like having my own classroom so I understand why that made her crazy. (T/SE/3/1)



Ellen feels passionate that students identified as having a disability are entitled to small group remediation and expressed reservations about whether her students' needs could be met in a co-teaching environment.

When a student comes into the smaller setting he does get more done because there's less distraction. You put him in an inclusive setting and leave him in there all day long when you know if you take him out sometimes maybe for writing he's going to get more done and more accomplished and feel better about himself. So I'm not sure how we're going to do this next year. (T/SE/3/10)

Ellen's additional responsibility to service students in kindergarten through third grade created a fragmented schedule. Ellen was the local screening chair and this additional role prevented her from co-teaching during science instruction. She also had the added responsibility of conducting any educational testing required for local screening and IEP reevaluations.

This year the instructional assistant is in the general education class for social studies because I am working with third graders then. Some of the days I go in for science if I am not in third grade or doing local screening which is scheduled during science. (T/SE/3/3)

Ellen and Katie acknowledged that their co-teaching situation was challenged but were hopeful that changes set in place for the following year would allow their co-teaching situation to blossom.

It was just really hard to do because all at once I have third and fourth graders and here is this second grader that you have to somehow make time to service her. Next year will be different because each special education teacher will be totally

responsible for the kids at their grade level. Anybody that gets referred for testing and gets found eligible will be their job. I'll just have the fourth graders which is going to make my job easier. (T/SE/3/11)

Ellen shared that every special education teacher would be responsible for testing required for newly eligible or reevaluation cases at their assigned grade level; and each special education teacher would be responsible for serving those students should they become eligible in the middle of the year at their assigned grade level. The expectation for the following year was for Ellen to only be responsible for fourth grade. Because the co-teaching arrangement was not preplanned, scheduled haphazardly, and not maintained made it that much easier for Ellen's skepticism to grow and Katie's experience jaded.

#### Case 4: Joan and Susan

##### *Tasks and Functions*

Joan, retired and now back as a special education teacher, has been working with Susan for one year. Susan, although new to the school as a general educator, is an experienced teacher with teaching licenses in both general and special education. Although both teachers were matched together by administration they feel fortunate to be working with one another. They credit their positive working relationship to sharing similar philosophical beliefs and respecting one another as teachers.

It's like a marriage and you have to be compatible and you have to know each other. I don't think you can just be put in a situation and it happens. I think you need to know about each other and the philosophies. I think you have to understand where each other is coming from. You have to figure out each other's styles and see if they are compatible. Both people have to be willing to share the

power. You don't realize how powerful you are as a teacher. You have a lot of power in the classroom. And when one person comes in then you have to have some kind of working agreement so that you have a unified front for the kids.

(T/SE/4/47-57)

Susan echos Joan's sentiment.

I feel like our personalities gel really well and if she's stressed I can be the rock and if I'm stressed she can be the rock. I feel like we've taken good emotional care of each other. And the other thing too is I think we like each other as human beings. I like to know about her family and her granddaughters and she likes to hear about my finance. (T/GE/4/45-48)

Administration advised the team at the start of the school year that they would be co-teaching with one another for science and social studies but gave them latitude on how it would look. "The management style I see going on here is they set the stage. I know they have an agenda but they don't put the agenda out and say you've got to follow it. And I think that is key to the success." (T/SE/4/63-65) At the beginning stages of their co-teaching Joan and Susan chose the model where one teacher leads and the other assists. After assessing this model they thought it best to divide the students into two groups and rotate the groups every eight weeks.

I think one of my difficulties is my default is just to run things so that I end up doing more leading not because Joan's not fantastic, just kind of because I was in my room and would just get all excited about what I was teaching. But as that went on we thought, wait a minute, there are two teachers and one instructional assistant in the room right now and we aren't necessarily using our best resources.

So we thought we would try dividing our groups in half. So mix all of our kids and then make two groups of about ten and do science since that is what we focused on. After about eight weeks of something we'd mix the kids and the kids would be in new groups again. (T/GE/4/9-20)

The team reflects continuously. They view this year's co-teaching as a way to prepare their students for the co-teaching model they will have next year with Casey and Lee.

My special education kids head to another co-teaching situation. So they will go into that class with the two teachers and instructional assistant. A little higher mix of special education but regular education and a second/third grade combination. I think they are going to have the best of all worlds. Being exposed to several teachers this year is going to help my students as opposed to having just one teacher in one classroom the whole time. They develop that flexibility of going back and forth with the larger group going and coming...and listening to someone else and deciding how their behavior may impact and also the behavior of other people. (T/SE/4/82-89)

The team acknowledges that their co-teaching model is at the preliminary stages but expect changes for next year. "At this point we are doing a kind of unusual model that seemed to work for us this year. We don't do co-teaching in the pure sense of the word." (T/SE/4/11-13)

#### *Task Enactment*

Planning was a challenge for this team. Although the team was allotted their weekly one hour of planning time as a whole grade level team, it was clear that this was

not sufficient. The first grade team was a new team and just getting to know one another and learning school policies and procedures.

So the harder thing about co-teaching is finding the time to plan. Our PLC [Professional Learning Community] time this year was really caught up in the fact that we were a very new first grade team. The two of us general education teachers were also new to the school and almost all of us were new to the first grade curriculum so it was a lot like, 'what are we going to do?' at our PLC meetings. Joan and I feel that we didn't do as well with our planning or as much as we should. And I think that probably for next year we'll set every other Tuesday to plan for two weeks. (T/GE/4/28-35)

Consequently their weekly planning focused primarily on administrative procedures. (D/4/2) And Joan and Susan did not opt to meet separately as a co-teaching team to discuss planning and instruction. This planning and sharing of ideas was often conducted while passing in the hall or during a lesson.

We are very creative. My teammate and I meet with the first grade team but we plan on the run...or I found this or look at this. We do try to plan when we are doing science. Our whole team meets Monday when we have back to back specials so that gives us an hour. And then throughout the year each quarter we are designated a day of planning that is free from children to do our planning. (T/SE/4/145-151)

Both teachers express confidence and competence that what they have done is laid a solid foundation upon which to build.

It is not a true co-teaching model. At best we co-planned and we have great expectations for next year because we have had a brand new first grade team. So we are off to a flying start to really unify the first grade team to know all of our students and all be able to work with each other's kids. (T/SE/4/23-27)

Individual student consideration was not a priority when determining the co-teaching arrangement for this team. But rather administration advised this team that co-teaching would occur for science and social studies. The team attempted to meet this expectation by at first both teaching simultaneously to the whole group but then later realized that it would be best to divide students into two groups based on the learning needs of the students. "The small group works for them better since the large group is much more difficult so it's been a learning experience for the kids." (T/SE/4/19-20)

Joan and Susan view it their responsibility to prepare their students for future experiences with co-teaching. Their co-teaching model prepares the students with disabilities for the transition they will experience in the following year. The expectation for their students next year is to be in the co-teaching model with Casey and Lee. "I think as far as this year that my very needy kids are as well prepared as they could be for next year." (T/SE/4/89-90) Administration expressed reservations about how students transition:

One of the first IEPs where I challenged the number of hours of special education involved a student transitioning from first to second grade. The teacher was assuming the student must fit into next year's program. But actually we don't know what next year will look like. The IEP document is supposed to be addressing the student's need. The program was driving the way the IEP was

going. The parent was excited since she really wants her daughter in a lot more inclusion which I thought was great. But I thought that was interesting and wondered why the teacher didn't push for more inclusion this year. I think our programs drive our needs. (T/Admin2/4/68-74)

Administration was concerned with this situation and needed to address this lack of compliance. They scheduled meetings with the special education teachers and focused discussions on a needs driven IEP verses a program driven IEP. (D, 4)

### *Social and Situational Context for Co-teaching*

Joan and Susan are a newly established co-teaching team. Administration arranged for Joan and Susan to be a team prior to the teachers meeting one another.

I was confident that Susan would be an excellent collaborator with Joan. Susan has some experience in co-teaching and is such an amazingly pleasant person that I can't think of any general education teacher who would better fit the bill.

Besides we expected that Joan might be resistant to co-teaching so what better match than Susan. (T/Admin1/4/184-193)

Joan, whose previous experiences were in a self-contained, understood administrations' intent that she embrace co-teaching and get more comfortable with this service delivery model. She accepted administration's intent and is pleased that she and Susan have latitude in how it will look in the classroom.

The co-teaching is to integrate my special education students with Susan's regular students and for me to have both experiences. Administration encourages it and they want it. From my observations I think they feel it is best for the kids. But they also realize all the pitfalls. So they let us choose and I think that is one reason

why Susan and I were able to go about it the way we did this year because that is just what worked for this group of kids. (T/SE/4/1-7)

Administration determined that Joan and Susan co-teach science and social studies but provided no other guidelines. Although this was a newly formed team, administration did not assess their co-teaching arrangement.

Although the administrators did not assess our co-teaching situation, I think had I requested that I know either of them would have. There was one time when one of them was in my room during science but it was when we were split so in some ways it was sort of seeing the co-teaching model because you're seeing half of it but not necessarily seeing the planning that goes on in the front of it or the lack of planning because 'oh my God, it's Tuesday and we haven't planned yet'.

(T/GE/4/69-74)

#### Cross Case Analysis: Roles and Responsibilities for a Co-teaching Model

Several themes have emerged from the data that describe co-teaching leadership roles and responsibilities. Results of this study are discussed in terms of the research questions of who, what, how, and why leadership roles and responsibilities are enacted. Five themes emerged from the data: (a) forming the team (b) scheduling (c) assigning instructional roles (d) allocating resources and (e) developing the co-teacher relationship. Factors that support or inhibit leaders will also be addressed.

#### Forming the Co-teacher Team

Forming the co-teacher team was a paramount leadership role and responsibility that emerged from the data. In the majority of instances it was the teachers who took on the leadership role and responsibility of establishing their co-teaching teams. Three teams



initiated their own formation and one team was formed by administration. Casey and Lee, in case two, approached administration with a proposal to start a co-teaching model. They both were committed to the concept and believed they could establish and maintain a successful program. In case one Ann was given leadership roles that enabled her to interview and then select Stacy as her co-teacher. In case three, Ellen and Katie formed a co-teaching team after working together on the same grade level in the previous year. Joan and Susan in case four were initially partnered together by administration. Administration considered Susan's background in special education when selecting her to be the general education teacher for this newly formed team. Eventually this team became enthusiastic and committed to continuing co-teaching with one another.

The leadership task of team formation is a continuous role and responsibility that was stretched over teachers and administrators. At the end of the year each team reflected on their present situation and hopes for the following year. Administration too evaluated and made decisions regarding next year's formations. Some teams expressed anxiety at the possibility they could be paired differently and were thrilled to learn that no changes were made. Each case was vested in the success and continuance of the team.

### Scheduling

Scheduling the academic day and designing teacher schedules was a critical component that emerged from the data. Scheduling was a major element and one that demanded a great deal of time and energy. Leadership was shared between administration and teachers. Classroom composition meetings for co-teaching were attended by teachers and administrators. These meetings allowed for teachers to actively create the co-teaching class. In all four cases teachers felt it was important to assume leadership in ensuring a

well-balanced grouping. The special educators took a major leadership role in this endeavor. In three of the four cases the special education students were placed in one general education class of that grade level. Placement of the general education students into the class required strategic planning. Selection would include students who were potential candidates for the special education program while also separating ESOL students to another general education class. In case three, the special education students were divided among two classes and this added an extra burden to Ellen's already hectic schedule. Another schedule glitch for case three was Ellen's responsibilities as local screening chair and special educator for additional kindergarten through grade three special education students. The special education team and administration exercised leadership by recognizing these scheduling conflicts and setting in place changes for next year by having Ellen's additional duties shared among the special education teachers.

Scheduling common planning time was important as evidenced by these four cases. Although administration established a one hour Professional Learning Community planning time weekly for the entire grade level, they did not schedule any common planning time for the co-teacher teams. It was the co-teachers themselves who were left to arrange planning time with one another. In case one, Ann and Stacy created weekly common planning. In addition they met and planned during their free time and even on the weekends. In case two, Casey and Lee knew from the beginning that common planning time was paramount to their success. They met daily together while the students were at specials. Yet in case three, Ellen and Katie did not schedule common planning time. They had their PLC grade level meeting but did not see a need to create an additional time to plan with just each other. In case four, Joan and Susan as a new team,

had not built into the schedule a common planning time but rather planned informally in the hallway or during class. They realized the shortcomings of this type of planning and were determined to set a formal time in their next year as a team.

The scheduling tasks are a major leadership role and responsibility of the co-teaching model. In all cases scheduling included student groupings, teacher assignments, and creating planning time. These tasks were ongoing leadership practices that were continually modified throughout the school year as the situation demanded. The responsibility for these tasks was shared among teachers and administrators.

### Assigning Instructional Roles

Assigning instructional roles and determining how the instruction would look in the classroom was a theme that emerged from the data. Leadership was stretched across teachers and administrators. In case one, Ann originally determined her role as primary teacher not allowing Stacy much opportunity to instruct. Leadership role was assumed by administration as they intervened when they saw this inequity. Administration met individually with Ann and Stacy to reevaluate their situation. The team reacted to this challenge positively and partnered in designing an improved co-teaching model. Casey and Lee, in case two, had an equal partnership and collaboratively determined the teaching assignments. Since both were dually certified they determined a schedule which allowed them to alternate their roles as special and general educator. In case three, Ellen's philosophical ambiguity led her to accept Katie's leadership in regard to their instructional roles. Katie designed the groups assigning the weaker students to Ellen and also provided Ellen with instructional lessons and materials. Ellen's frantic schedule, which prevented a common planning time, only perpetuated this situation. Administration

intervened toward the end of the year and began the process of restructuring Ellen's schedule. Due to this restructuring, Ellen viewed co-teaching more positively and recognized its potential in serving her students. In case four, the administration told the team at the inception of their co-teaching arrangement that they would co-teach for science and social studies but left the actual implementation for Joan and Susan to determine. Initially, Susan led instruction and Joan assisted. Then the team decided that to better utilize their skills they would divide the students into two groups and change the composition of the groups every eight weeks. The team assumed leadership by designing and then redesigning a new instructional model.

This important leadership task of assigning instructional roles was stretched across administrators and co-teachers. Although administration intervened in three of the four cases, the teachers remained prominently involved in decision making. In each of the four cases, general and special educators collaborated in assigning and assuming instructional roles.

### Allocating Resources

The allocation of resources, both human and material, was a role and responsibility present in all cases. Instructional assistants were considered a valuable resource by all. Although the school system's staffing formula determines the number of instructional assistants per school, their exact assignment is determined by the school's administration. Administration originally assigned IA's to special education teachers. Then each team would establish the role of the IA.

A recent school initiative to have at least two adults in every classroom during language arts and math has led to a redistribution of instructional assistants. For example

in case one, Ann's IA was assigned to another general education classroom for part of the day. This change impacted this team's co-teaching arrangement. However, the team learned to adjust to such a change. In case two, the IA provided support with instruction and creation of instructional materials. The instructional assistant supported students so that Casey and Lee could work with students in small groups. In case three, both Ellen and Katie relied heavily on the instructional assistant and assigned her teacher roles. Their way of grouping students necessitated the presence of an instructional assistant. In case four, Joan and Susan valued the instructional assistant and viewed her as a third teacher. In all four cases the instructional assistants were instrumental in supporting a co-teaching service delivery model.

Administration assumed leadership in assigning the classrooms and auxiliary spaces. In all cases administration ensured that special educators were afforded additional space of their own. This allocation allowed co-teachers freedom in delivering instruction. All four cases utilized the additional work space for small group instruction. Case one and three shared an additional room. Ann began to make use of the hallway as an alternative space when Ellen began utilizing their shared space more often and as her group grew. When it became obvious this arrangement was not working Ann advocated use of trailer space. Administration honored this request. Case two had a small classroom adjacent to their main room. They used this space for all students and consequently it was not viewed as a pullout location. For case four the location of the special educator's space was an issue. The long hallway that separated them complicated smooth transitions. The role and responsibility of allocating resources involves compromise with what is

reasonably available. Leadership was exercised by weighing the pros and cons and choosing what seemed to be best in the situation.

### Developing the Co-teacher Relationship

The theme of building relationships emerged from the data as a salient leadership role and responsibility. The participants all expressed the value they placed on the relationship. The data revealed that trust and confidence in their co-teacher's competence and dedication was essential in maintaining a co-teaching service delivery model.

In three of the four cases teacher teams established strong relationships and likened their relationship to that of a marriage. It was the social relationship that was as important as the working relationship in the three cases. In case one, Ann and Stacy worked to establish a solid relationship both as teachers and as friends. Building trust was critical to the team so that neither felt the other was being judged. They would spend time outside of school to further enhance their relationship. Ann originally was overpowering in her need to control the situation. As their relationship developed an atmosphere of trust was created and the dynamics between the two changed. Ann felt more confident and was able to relinquish some control. As Stacy's self-confidence improved she was able to express her ideas and assume more responsibility for the team. In case two, the team also exhibited a strong relationship and trust in one another. Casey and Lee were colleagues who initiated the formation of their team. They place a great deal of importance on the trust that has developed in their relationship. Casey and Lee were confident in their reliance they have on each other's ability. Roles and responsibilities were distributed fairly with neither one feeling they were sharing a majority of the workload. They admired one another's teaching practices and shared the same educational philosophy.

This commonality was the basis of their solid working and personal relationship. In case four, Joan and Susan were not acquainted when they began working together. As the year progressed they developed their relationship as they began to appreciate each other's contributions to the team. Joan and Susan became more comfortable and familiar with each other's strengths and style and were open to the one other's suggestions. Eventually they felt secure enough to make changes in their co-teaching arrangement. As their trust and reliance grew their relationship became stronger. The team spent their first year together laying a foundation of respect and which they proceeded to build on.

While co-teachers in cases one, two, and four demonstrated strong relationships and trust in one another, this was not as evident in case three for Ellen and Katie. Ellen's splintered schedule and their tiered student grouping for math created obstacles to their working relationship. Since Ellen was unavailable to attend many planning meetings it prevented her from becoming a committed member. The permanent grouping of students further isolated Ellen and divided the team even more. Both teachers recognized this difficulty and desired changes for next year. It was the administration, concerned about this team after reviewing SOL student test data, changed Ellen's schedule and guided the development of a more flexible student grouping.

Relationship was a strong theme in all four cases. Teachers and administrators expressed that a solid co-teacher relationship was central to the development of a successful co-teaching model. Leadership was stretched across all members. Although it was the teachers who worked at developing relationships, administrators intervened when challenges arose.

A matrix of citations from the interview transcripts for all themes presented in this section is contained in Appendix K.

### Factors that Influence Leadership of Co-teaching

Influential factors that support or inhibit the leadership practice of co-teaching were grouped into three categories: (a) school environment, (b) organizational arrangements with available resources, and (c) participants' profile. The *school environment* was built around the concept of collaboration and learning. Time for common planning amongst co-teachers was recognized as essential by all participants of the study. Schedules were created that allowed for weekly planning among teachers in three of the four cases. A special education retreat was arranged in order that special educators and administrators could reflect on their practices and make necessary changes for the subsequent year. The vision of Eleanor Roosevelt Elementary School, as proclaimed in the school's mission statement, is a commitment to provide a quality education for all students. The administrators in this study all had knowledge and classroom experience with special education students. They attended IEPs regularly and demonstrated knowledge of specific students. As a PLC school the administrators and teachers fostered a practice of collaboration. In cases one and two, the teachers worked with administration to create and plan their co-teaching arrangements. Administration created an environment that was receptive to teachers assuming roles and responsibilities for their co-teaching classrooms. Special educators attended class composition meetings to assist with the student groupings for subsequent years. In all four cases, teachers were aware and interested in one another's co-teaching arrangements. The culture allowed for



a community of learners where both administrators and teachers reflected on and evaluated the program.

The *organizational arrangements with available resources* were a practical influence on the implementation of the co-teaching model. In all four cases, additional space in a separate classroom was made available for the special educator. In case two, the teachers utilized an adjacent classroom to allow flexibility within the co-teaching model. However, in case four, the special educators' additional classroom was inconveniently located at a distance from the shared classroom. This presented a challenge to their co-teaching situation. In cases one and three, the special educators shared one classroom as their alternative work environment. Towards the end of the year this presented a challenge that they brought to administration's attention. Administration realized this space location issue needed to be corrected and they collectively brainstormed an alternative option for the following year.

The staffing model of this school was organized to facilitate an inclusive learning environment. The school was afforded additional staff to accommodate their area's noncategorical disability program. This additional resource allowed the administrators and teachers greater flexibility in assigning teachers and students. Special education teachers, regardless of their certification, instructed students at a select grade level. Instead of being grouped according to their disability, students were organized into clusters within a grade level. This allowed for the co-teaching model to be implemented at more grade levels than traditionally possible.

The *participants' profiles* influenced how leadership was practiced in this study. All three administrators had teaching experience that included working with students

with disabilities. The principal had co-teaching experience and recognized the practicality of co-teaching as a model to serve students in the least restrictive environment. The assistant principal was supportive and initiated conversations with several teachers to further the co-teaching initiative. In case one, Ann, the special educator, had experienced being treated as an IA while co-teaching in years past. She was determined to change this situation. Ann assumed leadership in the hiring of her co-teacher and assigned their instructional roles. As time went by, Stacy, the general educator, took on more responsibility thus their partnership became more equal. In case two, Casey and Lee, had been special educators teaching in a self contained setting and were dissatisfied with that model. Their dissatisfaction in this previous role led them to assume leadership in initiating and sustaining their co-teaching model. It was a sharing of leadership between both teachers that led to their growing confidence. Casey and Lee have become role models and leaders sharing their passion and reflections with colleagues.

In cases three and four, the administration provided the leadership to form the co-teaching team assuming that these two teams would further support the roles and responsibilities needed. However, Ellen and Joan's background and belief in the efficacy of the self-contained special education model hindered their full acceptance of the co-teaching model. This skepticism impeded their ability to assume leadership tasks such as scheduling, planning, and assigning instructional roles. Administration recognized the need to broaden these teachers' experience and fostered the development of their philosophy. It was exposure to cases one and two and the influence of the special education retreat that facilitated Ellen and Joan's ability to provide leadership in their own co-teaching models.

## CHAPTER FIVE

### DISCUSSION, CONCLUSIONS, AND IMPLICATIONS

The purpose of this study was to describe the leadership roles and practices related to providing instruction through the co-teaching service delivery model. Four cases at the elementary level were studied in depth. The study involved the collection of data through interviews with special and general education teachers and administrators, through observations and review of documents. Data analysis began with the collection of the first piece of data and continued throughout the study until the final report was completed. In this chapter, I summarize the findings and discuss my interpretations of them. Then, I describe conclusions drawn from the study and implications of this study for practitioners and for researchers. Finally, I provide personal reflection on the research process.

#### Summary of the Study

Co-teaching, as a special education service delivery model, provides promise as well as challenges to those who are committed to the education of students with disabilities. The Individuals with Disabilities Education Act (IDEA) requires educators in American schools to provide students with disabilities a free appropriate public education (FAPE) in the least restrictive environment (LRE). For most students with disabilities a general education classroom is considered to be the LRE. Many schools are using the co-teaching service delivery model as a way to educate students with disabilities in general education classes. Co-teaching which involves the cooperation of general and special educators is a service delivery model with the potential to meet both FAPE and LRE

requirements because it allows for instruction that ensures the delivery of what students need to learn in an environment with their age appropriate peers.

The purpose of this study was to describe and explain the instructional leadership practices related to the collaborative strategy of co-teaching. Specifically, this inquiry sought to provide a better understanding of the leadership used in implementing the co-teaching model.

This study used a distributive leadership perspective as a conceptual framework. Spillane, Halverson, and Diamond (2004) suggested that in order to understand how and why school leaders do what they do, one must explore the interaction of leaders' thinking and behaviors within their situations. These authors developed the distributive perspective, based on a coalescence of activity theory and distributed cognition theory to study school leadership. This perspective presents leadership practice as resulting from a system of interactions among leaders, followers, and the situation. In this study, the distributive leadership perspective guides the examination of instructional leadership practices as they relate to tasks and functions; task-enactment; and the social and situational distribution.

### Summary Discussion

Results of this study are discussed in terms of the research questions of who, what, how, and why leadership roles and responsibilities are enacted. Five roles and responsibilities were identified as essential in developing a co-teaching model: (a) forming the team; (b) scheduling; (c) assigning instructional roles; (d) allocating resources; and (e) developing the co-teacher relationship. Influential factors that support or inhibit the leadership practice of co-teaching will be also considered.

This study revealed that leadership of co-teaching is shared between the teachers and administrators. Essentially all responsibilities and roles were stretched between these positional and non-positional leaders. In three of the cases in this study, the co-teachers were responsible for forming their team and in just one case the team was formed by administration. Consideration of the individuals to be paired, whether self-selected or appointed by administration, provides a foundation for the co-teaching model and is an important leadership task (Nowacek, 1992).

Scheduling, which encompasses teacher schedules and class composition, was identified as vital to the co-teaching model in all cases and demanded a great deal of time and energy. These tasks were ongoing leadership practices that were continually modified throughout the school year as the situation demanded by both administrators and teachers. Lack of common planning time was identified as a major obstacle to successful co-teaching in most studies (Baker & Zigmond, 1995; Fennick & Liddy, 2001; Klingner & Vaughn, 2002; Walther-Thomas, 1997; Weiss & Lloyd, 2003; Welch, 2000). This study confirmed this finding yet also revealed that when co-teaching teams valued common planning and were committed to the model, they made the time and built it into their schedules.

In three cases, general and special educators collaborated in assigning instructional roles. Administration set some general parameters yet left the co-teachers to determine how their instructional model would be structured and the responsibilities involved. Previous studies reported teacher dissatisfaction when roles and responsibilities were perceived to be unclear and unequal (Fennick & Liddy 2001; Phillips, Sapona, & Lubic 1995; Trent, 1998). The teams in this study with more experience were able to

resolve issues by collaborating and assuming leadership. In case three, the special education teacher's hectic schedule and her skepticism influenced how co-teaching roles and responsibilities were enacted.

The allocation of resources, both human and material, was a role and responsibility identified in this study. This leadership task was initiated by administration who assigned instructional space and support personnel to the team. It was the teachers who determined the function of the additional classroom space and instructional assistants. In this study, each case was provided an additional classroom space that allowed for provision of services along the continuum (Phillips, Sapona, & Lubic, 1995). Such services in this study worked to support the legal requirement of LRE.

By far the strongest theme emerging from the data was the development of the co-teacher relationship. Other researchers referred to relationship as a factor in the success of co-teaching (Phillips, Sapona, & Lubic 1995; Nowacek, 1992). However participants in the present study placed a much greater emphasis on their co-teaching relationship. The data revealed that trust and confidence in their co-teacher's competence were essential to maintaining the co-teaching service delivery model. The co-teachers continually expressed their belief that a relationship grounded in a similar educational philosophy was necessary. The teams reported that this common ground enabled them to learn from one another and collaborate in creating a positive learning environment.

Influential factors that support or inhibit the leadership practice of co-teaching were grouped into three categories: (a) school environment, (b) organizational arrangements with available resources, and (c) participants' profile. The literature identified the importance of the principal as influencing the co-teaching model

(Beninghof & Singer, 1995; Brownell & Walther-Thomas, 2002; Goor, Schwenn, & Boyer, 1997). The current study confirms this finding but it also reveals the total school environment as an influential factor. The school in this study operated as a professional learning community where decisions were reached through discussion, commitment to inclusive practices, and continuous reflection. The school's collaborative atmosphere was supportive of the co-teaching model.

The organizational arrangements with available resources were a practical influence on the implementation of the co-teaching model. The availability of additional classroom space for special education teachers and allocation of support staff determined how the co-teaching model was arranged. The leadership practice called for flexibility when serving a vast array of students with varying disabilities. In order to serve students in a co-teaching model, special education teachers, regardless of their certification and training, instructed students across disability categories. Baker & Zigmond (1995) reported, too, on this cross-categorical service delivery arrangement. Although this arrangement allowed for greater flexibility when assigning students and teachers, it did result in some students receiving service from a teacher not trained in their specific disability.

Central to the co-teaching model in this study was the participants' profile. The administrators had previous experiences working with students with disabilities and were supportive of co-teaching. They were cognizant of special education policy and the interrelatedness of FAPE, LRE, and best practices (Crockett, 2002; Goor, Schwenn, & Boyer, 1997). Teachers' background, including dissatisfaction with past teaching experiences, inspired them to take on leadership in the roles and responsibilities of the

co-teaching model. Those who had been committed to the more traditional pullout model found it difficult to adjust to the new model. Administration recognized the need to broaden these teachers' experiences through collaboration, reflection, and education.

### Implications for Practice

Leadership is a complex process of thoughts and actions that solves problems, builds culture, nurtures leadership in others, communicates values and purpose, and institutes meaningful changes (Kelley & Peterson, 2000). Co-teaching is recognized as a viable model to provide all students a FAPE in the LRE. For most students with disabilities a general education classroom is considered to be the LRE. Many schools are using the co-teaching service delivery model as a way to educate students with disabilities in general education classes. This study sought to understand the leadership practice of co-teaching and identify practices useful so that better decisions can be made with regards to its support and success.

#### *Shared Leadership*

This current study revealed that leadership of co-teaching is indeed shared and distributed among teachers and administrators. Both teachers and administrators assumed leadership roles and responsibilities including forming the team, scheduling, assigning roles, allocating resources, and developing the co-teacher relationship. The educational community must recognize this sharing of leadership and in fact should promote an atmosphere that encourages it. Administrators should not impose their directives but rather should share decision making and collaborate with teachers. This study found that co-teaching classrooms can operate differently within one school. Principals should embrace this diversity so that co-teaching arrangements can be designed to fit each



individual situation. It is no longer possible for one person to manage effectively the changes and accountability demands now imposed on school leaders. The task must be divided, distributed, and developed among other individuals. Recognizing this need, educational administrators could consider nurturing and helping develop other leaders within the school setting in order to support the goal of providing a quality education for all students.

An imbalance of leadership was evident in this case study. Some teams needed more oversight than others. Administration was slow to recognize this discrepancy between the teams and failed to provide further leadership in a timely fashion. A more present leadership could have avoided these pitfalls.

#### *School Culture*

The school environment in the current study was one of collaboration and shared decision making. Administration was responsive and the atmosphere was conducive to a co-teaching model. As challenges arose with scheduling or allocation of resources, participants were able to work together toward resolving these difficulties. Scheduling and common planning problems are inherent in many co-teaching models. Leaders must focus on designing a plausible co-teaching schedule that allows co-teachers sufficient time to plan together.

#### *Co-teaching Relationships*

The relationship between co-teachers was identified as a major component of the co-teaching model. Participants related their belief that a strong relationship based on trust and mutual respect was essential. They worked hard at developing the relationship and referred to their interest in and knowledge of one another. Teachers even expressed

anxiety at the possibility of having their team disbanded. Leaders need to collaborate with co-teaching teams to determine their future as a team. Administration should consider letting teams stay together for more than one year so that a strong relationship can be developed. School leaders need to be aware of the significance of relationship and devote more time in team formation and encourage teachers to initiate their own teams.

### *Training*

One surprising finding in this study was the lack of school-based training for co-teaching teams. Although the district afforded school teams the opportunity for training these participants did not take full advantage of this option. The school itself afforded no formal training but rather participants developed their own model and learned from one another. The concept of job embedded staff development should be a consideration for leaders so that co-teachers can continue along their journey and teachers new to the model can build their foundation.

As noted by Baker and Zigmond, 1995, teachers in this study also were assigned a caseload without regard to their certification. This cross categorical arrangement placed students according to grade level rather than by their disability. This allowed for a greater number of co-teaching arrangements within a school but meant that teachers were servicing students with a vast array of disabilities. Consequently it is imperative that leaders ensure that co-teachers have training and knowledge in varying disabilities.

### Further Research

The research for this study focused on four cases at the elementary level in order to understand the leadership of co-teaching. It is hoped that research on more cases will verify the findings. This study found that leadership is stretched across all participants.

Future researchers are encouraged to replicate this study to further understand the distribution of leadership. Similar studies could be conducted at the middle and high school levels.

Future research is also needed to determine how schools evaluate the efficacy of their co-teaching models in regard to their leadership practice. Such studies might focus not solely on the leadership problems inherent in the model but how these issues are acknowledged and resolved. This study identified school environment as an influence in the co-teaching. Further studies might compare school environments to determine the depth of this influence.

Case studies of individual schools may be able to explain more specifically how the co-teaching relationship is developed. A longitudinal study might focus on co-teacher teams that have been together over time. An investigation of such a relationship may help leaders nurture new and existing co-teacher team relationships.

Future researchers might choose to examine staff development for co-teaching. A review of training offered at the university, district, and school levels would provide insight for leaders. Job-embedded training might be compared with traditional staff development opportunities. Such a study may stimulate innovative thinking and planning for educating those involved in the co-teaching service delivery model.

#### Reflections of the Researcher

This study was dependent on the participants' generosity. I was fortunate to have participants so willing to give their time and share their experiences and reflections. Each participant was enthusiastic in the desire to contribute to this study. Their enthusiasm was both inspiring and very rewarding.

Reflecting on the process involved in this study, I can identify some aspects that I would recommend some fine tuning for future researchers who seek to conduct a similar study. First, I would adjust the pace with which I conducted interviews. Because I chose to complete the transcriptions myself, I found that there were times that I needed to slow down so that I would have time to complete open coding of the transcripts and identify emerging categories. Second, the pace and excitement of collecting data and transcribing can easily become overwhelming. I had to adjust the pace of data collection to allow more time on analysis. Third, I would change the names of the participants immediately upon collection and analysis. I did not provide pseudo names until the end of data analysis which made it difficult to adjust to their new names. All in all, these process recommendations are relatively minor adjustments but may facilitate future research efforts.

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Appendix A  
Electronic Submission  
Administrator Interview Reminder Note

Lauren Sheehy  
7230 Lensfield Ct.  
Alexandria, Va 22315

Dear \_\_\_\_\_:

Thank you for agreeing to assist me in my studies. I know your time is valuable but you may be assured that the time I spend with you is very important to me. I believe that the time I spend with you and your teachers, and viewing your various documents will provide important information.

On \_\_\_\_\_, I plan on visiting your school building for an interview with you at \_\_\_\_\_. Our conversation will focus on the instructional leadership practices in the co-teaching of special and general education teachers as a service delivery model. Following our conversation, I would be grateful for the opportunity to review documents such as teacher handbooks, administrative and school memos, meeting agendas, and anything else you deem appropriate would assist me in understanding the leadership function for providing co-teaching in your building.

I plan to meet and interview each co-teaching team. The interviews with you and your teams will take approximately one hour. They will be audiotaped with each party's approval, and I will transcribe them for use in my dissertation. All information will be kept strictly confidential and any identifying information will be kept in locked storage and disposed of after completion of the study.

Please find enclosed a demographics survey for you to fill out.

Thank you for agreeing to give of your time. If you have any questions or need to contact me, I can be reached at 703-508-5245 or by email at [lsheehy@vt.edu](mailto:lsheehy@vt.edu).

Sincerely,

Lauren Sheehy

Encl.  
Demographics survey  
Co-teacher team reminder letter

## Appendix B

Electronic Submission  
Co-teacher Team Interview Reminder

Lauren Sheehy  
7230 Lensfield Ct.  
Alexandria, Va 22315

Dear \_\_\_\_\_:

Thank you for agreeing to assist me in my studies. I know your time is valuable but you may be assured that the time I spend with you is very important to me. I believe that the time I spend with you and viewing your various documents will provide important information.

On \_\_\_\_\_, I plan on visiting for an interview with you at \_\_\_\_\_. Our conversation will focus on the instructional leadership practices in the co-teaching of special and general education teachers as a service delivery model. Following our conversation, I would be grateful for the opportunity to review documents such as teacher handbooks, administrative and school memos, meeting agendas, and anything else you deem appropriate would assist me in understanding the leadership function for providing co-teaching in your classroom.

The interviews with you and your teammate will take approximately one hour. They will be audiotaped with each party's approval, and I will transcribe them for use in my dissertation. All information will be kept strictly confidential and any identifying information will be kept in locked storage and disposed of after completion of the study.

Please find enclosed a demographics survey for you to fill out.

Thank you for agreeing to give of your time. If you have any questions or need to contact me, I can be reached at 703-508-5245 or by email at [lsheehy@vt.edu](mailto:lsheehy@vt.edu).

Sincerely,

Lauren Sheehy

## Appendix C

### Electronic Submission Administrator's Demographic Survey

#### Administrator's Demographics Survey

Please indicate your response for each item.

1. How many years have you been administrator?
2. How many years have you been assigned to your current school?
3. Prior to being an administrator what position in a school did you hold?
4. How many years were you in that position?
5. If you were a teacher, how many years?
6. Please list the degree you hold and any additional endorsements?
7. As a teacher, what experience have you had working with students with disabilities and special education teachers?
8. How many special education teachers do you have on your staff?
9. How many general education teachers do you have on your staff?
10. How many classrooms are designated for the special education team?

## Appendix D

Electronic Submission

### Teacher's Demographic Survey

#### Teacher's Demographics Survey

Please indicate your response for each item.

1. How many years have you been a teacher?
2. How many years have you been a teacher at your current school?
3. What is your current school assignment?
4. What previous experience, if any, have you had working with students with disabilities?
5. Please describe school leadership positions you have held.
6. Please list the degree you hold and any additional endorsements?

Appendix E

## Ethics Protocol / Participant Release Agreement

(To be read by interviewer before the beginning of the interview. One copy will be left with the respondent, and one signed copy will be kept by the interviewer.)

I am the researcher in the project entitled: Leadership Practices of Co-teaching. This project is part of my doctoral work through the Department of Educational Leadership and Policy Studies at Virginia Tech. I may be contacted at 703-508-5245 or [lsheehy@vt.edu](mailto:lsheehy@vt.edu) if you should have any questions.

Thank you for your willingness to participate in this research project. Your participation is important to my doctoral studies and is very much appreciated. Before we start the interview, I would like to reassure you that as a participant in this project you have several rights:

First your participation in this interview is entirely voluntary.

You are free to refuse to answer any question at any time.

You are free to withdraw from the interview at any time.

This interview will be kept strictly confidential and will be available only to members of the research team, which includes my professors and myself.

Excerpts of this interview may be made part of the final research report, but under no circumstance will your name or identifying characteristics be included in this report.

I would be grateful if you would sign this form to show that I have read you its contents.

\_\_\_\_\_ signed

\_\_\_\_\_ printed

\_\_\_\_\_ dated

## Appendix F

### Administrator Questionnaire

The central ideas of the distributed leadership perspective, tasks and functions; task-enactment; social and situational distribution of task enactment guided the formation the interview questions.

1) Tell me about your special education programs within your building.

Prompts:

How are these programs different within the last few years?

How do you structure the teachers within the programs (ED, Aut, LD certified)?

Do your autism/ED/MR/LD teachers have the skills necessary to work with students outside of their specialty area?

What do you expect from your special education teachers?

What do you expect from your general education teachers working with students with disabilities?

How do you ensure individual programming for each student with a disability?

When are decisions made regarding placement of services and who is involved in the decision making?

How do you organize space for special education teachers and students?

How might you keep yourself current in the field of special education—teachers?

Resources? Central office administrators?

2) Tell me about the co-teaching situations within your building.

Prompts:

How are these teams determined?



How do students get assigned to these settings—are they in the classroom all day?

What about the other students assigned to the co-taught classroom?

Tell me about the instruction in these co-taught classrooms—do they look different?

How then do you assess the co-teaching situation?

Have the co-teacher teams received training in the co-teaching method?

Do teachers have shared planning times and what happens during this time?

3) What barriers do you encounter with the co-teaching method?

Prompts:

Which grade levels offer co-teaching?

Are there certain teacher characteristics that you look for in a co-teacher—do you think about this when determining teams or interviewing for special and general education teachers?

Do any students with disabilities receive services outside the general education classroom---have you ever had to remove a student serviced in the co-teaching situation so that instruction could be delivered in a special education classroom?

4) What aspects of special education do you find most challenging?

5) How does the community respond and react to co-teaching?

6) Is there anything else you would like to share before concluding the interview?

## Co-teacher Questionnaire

The central ideas of the distributed leadership perspective, tasks and functions; task-enactment; social and situational distribution of task enactment guided the formation the interview questions.

1) Tell me about your co-teaching situation.

Prompts:

Have you been trained as a co-teacher?

What does instruction look like in your classroom? How is instruction individualized?

What is your student caseload?

How many other teachers and classrooms does the special educator serve?

How is support provided in the absence of the special educator?

How is the decision reached about whether a student is taught in a co-taught setting?

Do you expect these students to be in co-taught settings for the remainder of elementary school?

How are parents involved in the decision making about co-teaching? How do they come to know/understand the co-teaching method?

How are the general education students determined to be in the co-taught classroom?

How do other teachers within the building feel about co-teaching?

2) How and in what ways does your principal understand and support co-teaching?

Prompts:

Are you assessed as a co-teaching team?

How do you determine the effectiveness of the co-teaching method?

Are there additional supports you feel are needed that are not addressed?

Do you have a shared planning time? How is this time spent?

3) Discuss leadership positions you have had in this school.

Prompts:

Were you involved in the beginning stages of implementing co-teaching?

Discuss how the program was implemented and who was involved. (teacher caseload, classroom composition, co-teaching model selection, co-teacher teams, program evaluation).

How was the co-teaching model shared with the school community (parents and staff)?

Were you involved in staff development for the school on co-teaching?

4) Is there anything else you would like to share before concluding the interview?

## Appendix H

### District Level Special Education Administrator Questionnaire

- 1) What is your role in serving the schools?
- 2) What do you see is the function of co-teaching and what tasks do you participate in to support it?
- 3) Discuss the staff development opportunities available for co-teacher teams. How is your general education counterparts involved in this training?

## Appendix I

### Facilities Profile

#### Space

- General education design and work space availability
- Special education resource classrooms
- Location of general education classroom to the special education resource room

#### Resources

- Number of teacher desks in general education classroom
- Availability and number of teacher manuals and materials

## Appendix J

# Observation Guide

Date

Location

Participants and their participation level

Purpose of the meeting (function and situation)

Tools and artifacts referenced and/or used

Tasks assigned

## Appendix K

Citations from the interview transcripts for themes

<b>Themes</b>	<b>Case 1</b>	<b>Case 2</b>	<b>Case 3</b>	<b>Case 4</b>	<b>Admin</b>
<b>Forming the Team</b>					
	SE (lines) 1-25, 45-59, 79-85, 375- 396	SE (lines) 1-7, 54-57, 216-222	SE (lines) 261-283	SE (lines) 1-13, 21-30, 58-65, 136- 139, 152- 162	Admin1 (lines) 25- 36, 91-106
	GE (lines) 5-11, 13-20, 60-75, 116- 126	GE (lines) 1-7, 18-21	GE (lines) 39-40, 60- 63, 176- 193, 296- 315, 383- 395, 424- 426, 435- 444	GE	Admin2 (lines) 1-7, 18-43, 75- 82, 247- 263
					Admin3 (lines) 66- 68
<b>Scheduling</b>					
	SE (lines) 26-41, 129- 131, 135- 139, 223- 231, 233- 256	SE (lines) 18-21, 25- 30, 36-43, 58-63, 86- 104, 111- 113, 118- 125	SE (lines) 1-15, 23-53, 100-117, 127-131, 156-160, 233-240, 290-334	SE (lines) 14-20, 31- 37, 40-42, 82-97, 103- 105, 145- 151	Admin1 (lines) 17- 24, 46-57, 118-119, 158-159
	GE (lines) 46-58, 89- 96, 98-103	GE (lines) 57-58, 71- 99, 151-172	GE (lines) 8-10, 32-33, 41-43, 50- 59, 64-70, 92-103, 143-146, 152-158, 195-202,	GE (lines) 1-8, 28-38, 90-111, 125-131, 162-166	Admin2 (lines) 83- 84, 89-92, 96-105, 180-184, 205-212

			216-230, 320-321		
					Admin3 143-148, 184-195
<b>Assigning Instructional Roles</b>					
	SE (lines) 66-78, 91- 94, 114- 128, 131- 134, 140- 150, 205- 218, 297- 306, 319- 328	SE (lines) 11-16, 64- 69, 157- 163, 184- 192	SE (lines) 68-72, 74- 89	SE	Admin1 (lines) 59- 74, 107- 112, 190- 201, 216- 221
	GE (lines) 28-45	GE (lines) 68-70, 114- 127, 140- 150	GE (lines) 74-89, 105- 131, 159- 171, 203- 215	GE (lines) 9-27, 77-89	Admin2 (lines) 106-123, 156-160, 165-171
					Admin3
<b>Allocating Resources</b>					
	SE (lines) 42-44, 257- 279, 307- 311, 397- 406	SE (lines) 8-10, 22-24, 32-35, 114- 117, 180- 183	SE (lines) 65-66, 73, 119-123, 137-144, 149-155, 170-179	SE (lines) 100-102, 119-127, 163-166	Admin1 (lines) 2-4, 8-13, 43- 45, 75-90, 113-117, 120-131, 136-142, 161-169, 176-182, 203-215



	GE (lines) 25-27, 104-114, 157-163	GE (lines) 26-31, 59-63, 100-107, 128-139, 180-184	GE (lines) 25-31, 44-49, 90-91, 132-142, 316-319	GE (lines) 39-42	Admin2 (lines) 50-56, 60-64, 85-88, 132-155, 172-179, 185-201, 264-277
					Admin3 (lines) 12-33, 96-98, 171-177
<b>Developing the Co-teacher Relationship</b>					
	SE (lines) 60-65, 95-113, 150-167, 178-185, 280-296, 312-315, 330-332, 337-340, 359-374	SE (lines) 44-53, 69-85, 147-156, 164-171, 203-205	SE (lines) 180-186	SE (lines) 47-57, 66-81	Admin1 (lines) 170-175, 186-189
	GE (lines) 76-86, 127-134, 138-142	GE (lines) 8-15, 64-67, 176-179	GE (lines) 34-38, 147-151, 235-294, 396-413	GE (lines) 43-67, 178-181, 192-197	Admin2 (lines) 44-49, 57-59, 223-240
					Admin3 (lines) 52-62

Appendix L

Author/Year	Title	Purpose of the Study	Methodology/ Sample	
Austin, V.L., 2001	Teachers' Beliefs About Co- Teaching	To ascertain the factors affecting the co-teaching service delivery model.	Methodology: Survey and interview Sample: 139 special and general education teachers were surveyed and 12 co-teachers were interviewed	
Baker, J.M. & Zigmond, N., 1995	The Meaning and Practice of Inclusion for Students with Learning Disabilities: Themes and Implications from the Five Cases	To determine the nature of special education services in co-teaching classrooms.	Methodology: Interview, observation, and review of documents Sample: Teachers, administrators, students, and parents	
Fennick, E. & Liddy, D., 2001	Responsibilities and Preparation for Collaborative Teaching: Co- Teachers' Perspectives	To assess co- teachers' perceptions of co- teaching.	Methodology: Survey Sample: 168 general and special education teachers	
Klinger, J.K. & Vaughn, S., 2002	The Changing Roles and Responsibilities of an LD Specialist	To understand the changing roles and responsibilities of a special education teacher from resource room to that of co-teacher.	Methodology: Interview, observation, and review of documents Sample: The general and special education teachers and administrators at one elementary school.	

Morocco, C.C. & Mata Aguilar, C., 2002	Co-teaching for Content Understanding: A Schoolwide Model	To investigate a schoolwide co-teaching model and ascertain the school's vision and model of co-teaching.	Methodology: Interview, observation, Sample: Three special education teachers, eight general educators, and four administrators	
Nowacek, J. E., 1992	Professionals Talk About Teaching Together: Interviews with Five Collaborating Teachers	To understand how co-teachers collaborate and what benefits and concerns they encounter.	Methodology: Interview Sample: Three special education teachers and two general education teachers	
Phillips, L., Sapona, R. H., & Lubic, B. L., 1995	Developing Partnerships in Inclusive Education: One School's Approach	To explore factors that contributed to the teachers' working together in a co-teaching environment.	Methodology: Interview Sample: Six general education teachers and four special education teachers.	
Trent, S. C., 1998	False Starts and Other Dilemmas of a Secondary General Education Collaborative Teacher: A Case Study	To report factors that influenced co-teaching roles, responsibilities, and relationships.	Methodology: Interview, observation, and review of documents Sample: Two special education teachers and one general education teacher.	
Walther-Thomas, C. S., 1997	Co-teaching Experiences: The Benefits and Problems that Teachers and Principals Report Over Time	To report on emerging benefits and persistent problems in developing co-teaching models.	Methodology: Interview, observation, and review of documents Sample: 119 teachers and 24 administrators	
Weiss, M. P., & Lloyd, J. W., 2003	Conditions for Co-teaching: Lessons from a	To document the roles and responsibilities	Methodology: Interview, observation, and	

	Case Study	and factors that influenced these roles.	review of documents Sample: Six special education teachers	
Weiss, M. P., & Lloyd, J. W., 2002	Congruence Between Roles and Actions of Secondary Special Educators in Co-Taught and Special Education Settings	To examine and describe the roles and instructional actions of co-teachers in the general education setting and the special education setting.	Methodology: Interview, observation, and review of documents Sample: Six special education teachers	
Welch, M., 2000	Descriptive Analysis of Team Teaching in Two Elementary Classrooms: A Formative Experimental Approach	To assess student outcomes, teaching procedures, and teacher impressions of the co-teaching model.	Methodology: Focus group, review of documents, and student outcomes on pre and posttest Sample: Two general education and two special education teachers. One class of 28 fourth grade students and one class of 17 fifth grade students.	