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# THE CHANGING ROLES AND RESPONSIBILITIES OF AN LD SPECIALIST

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**Abstract.** This article chronicles a single teacher's journey from expert resource teacher for students with learning disabilities (LD) to novice inclusion teacher and then expert inclusion specialist over a seven-year period. Through case study methodology, our purpose was to clarify the emerging role of the inclusion teacher by (a) describing her activities, (b) relating her perceptions of her role, and (c) explaining how her role differed in resource and inclusion settings over the years. Four broad categories emerged during our data analysis: assessment practices, teaching, consultation, and interpersonal skills. We concluded that the role of the inclusion teacher is complex and multifaceted and depends largely on the teacher's interpersonal and communication skills. The inclusion teacher must be knowledgeable about the general education (GE) curriculum, skillful at anticipating student difficulties with learning tasks, and adept at providing ongoing adaptations and accommodations. As increasing numbers of students with disabilities are educated in GE classrooms, preservice and inservice teacher education programs must address how best to prepare both GE and special education teachers for their roles.

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Joyce teaches students with learning disabilities (LD). When she began her teaching career over 20 years ago, and for several years, she only taught students with LD in pull-out or resource settings. In the spring of 1993 her assistant principal asked if she would be interested in helping to start an inclusion program at her school. Joyce readily agreed. This article describes the changes in her role and responsibilities as she gained expertise as a co-teacher and inclusion specialist.

Inclusion programs that involve collaborative planning and teaching between general and special education teachers are increasingly used as the service delivery model for students with LD in schools across the nation (Council for Exceptional Children, 1994; McLeskey,

Henry, & Axelrod, 1999). Yet the extent to which students with LD benefit from full-time placement in general education (GE) classrooms continues to be questioned (Fuchs & Fuchs, 1994; McLeskey et al., 1999; Klingner, Vaughn, Hughes, Schumm, & Elbaum, 1998). Although a few advocates of the full inclusion movement would like to abolish special education and eliminate the need for "special educators" (Lipsky & Gartner, 1989, 1991; Stainback & Stainback, 1992; Thousand & Villa, 1990), the predominant approach to inclusion appears to be less radical — one that augments rather than replaces the continuum of services for students with special needs (Council for Exceptional Children, 1993; National Association of State Boards of Education, 1992).

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Most seem to agree that nearly all students with LD should spend the majority of each school day in a general education (GE) classroom, and that most of their needs can and should be met in an inclusive environment (Klingner et al., 1998; Marston, 1997; McLesky & Waldron, 1995; Vaughn & Schumm, 1995). Inclusion in this latter sense calls for general and special educators to form partnerships that involve working together and learning from each other. These partnerships require a new role for special educators who previously were able to provide instruction for students with LD using materials and instructional approaches they alone felt were appropriate and in a setting outside of the GE classroom. As articulated by Ferguson and Ralph (1996), "this shift in role represents movement toward merging the parallel systems of general and special education into a single unified system ..." (p. 49). Furthermore, for some resource teachers, "this shift in role threatens a loss of tradition, status, influence, and the very core of what makes special education *special*" (p. 49).

For the purposes of this article, we define inclusion as the placement of students with disabilities in the GE classroom full time with special education support services provided within the GE classroom setting (Idol, 1997). As general and special education teachers establish procedures for co-planning and instructing students with LD in inclusion classrooms, few precedents are available to guide them as they enter their new partnerships. We know a great deal about the role of the resource teacher (Gickling, Murphy, & Malloy, 1979; McNamara, 1989; Speece & Mandell, 1980; Wiederholt, Hammill, & Brown, 1978), but the role of the LD inclusion teacher has been less clearly defined and continues to emerge (Ferguson & Ralph, 1996; Idol, 1997; Pugach & Johnson, 1995). Those who have investigated general and special education teachers' views of and experiences with team teaching and collaborative consultation models have written about the challenges of such arrangements (Idol & West, 1988; Johnson, Pugach, & Hammitte, 1988; Myles & Simpson, 1989; Pugach & Johnson, 1995; Voltz, Elliott, & Cobb, 1994; Walther-Thomas, 1997; Wood, 1998). These challenges include (a) finding mutual planning time, (b) scheduling students and teachers, (c) large caseloads, (d) changes in administrative support, (e) personality conflicts, (d) inadequate consultation skills, and (e) less than clearly defined roles.

It is our position that by clarifying the role of the inclusion teacher, preservice and inservice teacher education efforts might be better directed. As noted by Kauffman (1994), the training special education teachers receive must distinguish their role from that of general education teachers (GE teachers). The skills needed to provide individualized, intensive, remedial

instruction to a few individuals are different from those required to teach a whole class of students (Baker & Zigmond, 1995). Furthermore, teacher education programs continue to prepare prospective special education teachers for resource teacher but not necessarily inclusion teacher roles (Bos & Vaughn, 1994). A description of the role of inclusion teachers should assist in identifying the skills teachers need to perform effectively.

The purpose of this article is to clarify the emerging role of the LD inclusion teacher by focusing on the changes experienced by one LD specialist over a seven-year period. A few researchers such as Idol and Pugach have interviewed inclusion teachers and/or offered their expert opinions; however, no case studies could be located in the literature that chronicle a single teacher's journey from expert resource teacher to novice inclusion teacher and then expert inclusion specialist.

## METHODS

### Setting and Participants

For the past seven years we have worked cooperatively with an urban elementary school, Blue Heron, during its initiation of an inclusion program in 1993/1994 and as the inclusion model has expanded and changed over the years. This study complements other research we have conducted with the teachers and students in this school. (For a description of the academic outcomes of the students in inclusion classrooms, see Klingner, Vaughn, Hughes, Schumm, & Elbaum [1998]. See Vaughn, Elbaum, & Schumm [1996] for a report of students' social skills, Klingner, Vaughn, Schumm, Cohen, & Forgan [1998] for a summary of students' perceptions of inclusion, and Vaughn et al. [1998] for a description of the professional development provided to teachers.)

**Overview of the school.** Blue Heron is a K-6 school located in a large, diverse southeastern school district. Over the years the school's demographics have remained fairly consistent, with approximately 1,000 students a year (94% Hispanic), of whom about 77% were on free or reduced-cost lunch. In 1993, when there were 40 students with LD, the school employed two full-time special education teachers. In 1994, another full-time special education teacher was added when the number of students with LD increased to 64. The school continues to employ three full-time special education teachers.

**Overview of the resource model prior to 1993/1994.** Joyce and one other LD teacher shared responsibility for providing pull-out services to the school's students with LD and other high-incidence disabilities. Students with low-incidence disabilities had been transferred to other schools in the district. Joyce worked with K to 4th-grade students, while the other LD teacher provided services to

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4th- to 6th-grade students. The resource program was housed in a portable classroom located at some distance from the school's GE classrooms, in a field adjacent to the school. Half of the portable was allocated to Joyce, the other half to the second teacher, with a partition in the middle. Joyce worked with groups of students that ranged in size from two to eight, for one half to two hours a day. Her total caseload ranged from about 23 to 28 students. Through a "homework club" she provided additional assistance before school hours.

**Overview of the inclusion program during its first year.** Joyce provided in-class instruction for 19 students with LD during inclusion's first year. She worked all day in three GE teachers' classrooms (second, third, and fourth grades), for 30-90 minutes in each class. All teachers volunteered to participate in the inclusion program. The number of students with disabilities placed in each of the three GE teachers' classes ranged from two to nine. The second special education teacher continued to provide pull-out special education services in a resource room, for approximately 22 5th- and 6th-grade students.

**Overview of the inclusion program during subsequent years.** During the second year of inclusion, the school qualified for a third special education teacher and was able to expand its model. Inclusion classrooms were added at the kindergarten, first-, and sixth-grade levels. Joyce continued over the next four years to work in three or four classrooms on any given day. In the fall of 1998, the special education teacher who had been providing pull-out services in the resource room transferred to another school (unhappy with the inclusion model and how it had impacted her resource program — she felt that she had been left with all of the "hardest to teach" students). The special education teacher who replaced her was a new teacher, anxious to teach in inclusion classrooms rather than the resource room. At this point, Joyce began teaching in the resource room each afternoon and in inclusion classrooms every morning. She continued in this fashion throughout the 1998/1999 school year and until she retired in the fall of 1999.

**Background information about the teacher.** Joyce taught as a resource teacher for 15 years and then as an inclusion specialist for six years. She holds a master's degree in special education. Prior to the first year of this study, she had never taught in a GE classroom. As a resource teacher, she had gained a great deal of experience assessing and teaching a range of students with special needs, including students identified as having cognitive disabilities, behavior disorders, emotional handicaps, and vision and hearing impairments; however, the majority had LD. Joyce was very well respected and liked by her colleagues and administrators as being an effective, competent teacher.

**Researchers' role in the school.** Over the seven-year period from 1993 to 1999, the first author spent a day at Blue Heron every week (for over 200 visits) (with the exception of a six-month period in which the second author regularly visited the school to provide assistance and collect data). The first author began working at the school as a researcher, but in 1994 when Blue Heron became a Professional Development School, she became the school's Professor in Residence. She regularly observed in inclusion classrooms and provided demonstration lessons. She kept a log of these visits. She also spoke with Joyce on a regular basis over the years, conducting tape-recorded interviews with her as well as numerous informal conversations. In addition, she met regularly with the GE teachers with whom Joyce co-taught. During the first three months of the 1993/1994 school year, when the inclusion model was first getting started, she met weekly with the entire inclusion team (general education and inclusion teachers) for approximately 30 minutes to discuss implementation practices. Over the years, she also met regularly with Blue Heron's administrators.

#### **Sources of Information**

We gathered data from several sources for this research: (a) individual interviews, (b) focus group interviews, (c) classroom observations, (d) notes from meetings with general and special education teachers and administrators, (e) Joyce's journal and other written records and plans, and (f) a "think-aloud" procedure with Joyce. It is our position that the role of the inclusion teacher can best be understood within the school context and the sociocultural setting in which the role is performed. Roles are fluid rather than static, continually evolving based on the actions and perceptions of those involved (Biddle & Thomas, 1966; McLoughlin & Kass, 1978). Therefore, the same data sources were not used every year but were adjusted to provide additional information as needed to complete the portrait of Joyce's role as a resource room teacher (see Table 1).

**Individual interviews.** During the first year of this study we conducted three interviews with each participant using the format recommended by Seidman (1991) and Weade (1993). The purpose of the first interview was to develop a context for understanding participants' views regarding inclusion and to set the stage for further questioning. We asked teachers and administrators to tell about their *past* experiences related to students with special needs, the resource model, inclusion, and collaborative consultation. During the second interview, we asked teachers and administrators to talk about their *current* experiences related to students with special needs, inclusion, and

**Table 1**  
**Overview of Data Sources by Year**

	Interviews with Joyce	Interviews with administrators	Interviews with GE teachers	Focus group interviews	Observations in inclusion classrooms	Meetings about inclusion	Joyce's journal	Field notes
Year 1 (93/94)	X	X	X		X	X	X	X
Year 2 (94/95)	X	X	X	X	X			X
Year 3 (95/96)	X	X	X		X			X
Year 4 (96/97)	X	X	X		X			X
Year 5 (97/98)	X	X	X		X			X
Year 6 (98/99)	X	X	X	X	X			X

collaborative consultation. It was in the third interview that we asked participating teachers to reflect on the meaning of their experiences. These interviews were conducted like conversations: Questions were followed by probes that varied with each participant. During subsequent years, some of our interviews continued with this conversational format, whereas others were semi-structured. The semi-structured interviews followed a prescribed list of questions and followup probes. Joyce was interviewed two to four times a year over the period of the study. In every case, interviews were tape-recorded and transcribed.

**Focus group interviews.** During the last year of the study we conducted two focus group interviews with Joyce, her co-teachers, and other GE and special education teachers (eight per interview) to ascertain their perceptions about the changing inclusion model at their school. Unlike individual interviews, the group setting of the focus group interview enabled participants to exchange ideas and elaborate on them through discussion (Stewart & Shamdasani, 1990). Focus group interviews followed the format suggested by Vaughn, Schumm, and Sinagub (1996), in that the moderator directed the group discussion using core questions that served more as a mental checklist than a

strict protocol. Each focus group interview lasted approximately 90 minutes.

**Classroom observations.** During the first year of this study, a researcher observed in each of the inclusion classrooms an average of twice per month, and no less than once per month (18 observations minimum). Observations lasted from 30 to 50 minutes each. At first the observer primarily watched what happened in the classroom and took field notes. However, as the school year progressed, the observer interacted more frequently with the students and teachers in the classroom, assisting individuals and small groups, participating in lessons, and occasionally providing instruction. During the second year of the study, a researcher observed in each of the inclusion classrooms once a week, on average (Vaughn, Hughes, Schumm, & Klingner, 1998). During the third and subsequent years, the first author conducted observations in inclusion classrooms on a weekly basis (over 300 observations). These observations were conducted for a variety of research and professional development purposes (not only for this study). In some cases, the researcher kept field notes, in other cases she did not.

**Teacher meetings.** During the first year of inclusion, one of the researchers met regularly with Joyce and her

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co-teachers to identify issues related to implementation of the inclusion model. These meetings took place two or three times a month for 30 minutes during the first four months of the school year, and then gradually less frequently (for a total of 18 meetings). The meetings were tape-recorded and transcribed.

**Joyce's journal and other records and plans.** During the first year of the study, Joyce kept a regular diary in which she recorded her impressions as a first-year inclusion teacher. She wrote about the challenges and successes she was experiencing on a day-to-day basis. She also used the journal as a way to ask questions about program implementation. The journal was interactive in that the first author regularly read the entries and provided feedback. The researcher photocopied the journal as a data source, while Joyce kept the original. Other records and lesson plans were similarly photocopied and added to our database.

**Think-aloud procedure.** We compiled our first year data and wrote up a description of Joyce's experiences during the first year of the inclusion model (1993/1994). During the last year of the study, we asked Joyce to read the report and stop periodically (no less than after every paragraph) to reflect about what she was reading and how the inclusion model had changed over the years. We tape-recorded and transcribed this think-aloud procedure.

### Data Analysis

As suggested by Miles and Huberman (1994), we conducted multiple flows of data analysis. As soon as data were collected (i.e., taped individual and focus group interviews, meetings, and Joyce's think-aloud), they were transcribed. We analyzed the transcriptions as well as our observation notes and Joyce's journal. After the first year of data collection, we generated and defined categories for analysis by independently examining randomly selected data sets and searching for common ideas and themes (Strauss & Corbin, 1990). We then met to negotiate a mutual set of broad categories. The categories that emerged through this process were as follows: (a) assessment, (b) teaching, (c) consultation, and (d) interpersonal skills.

Next, throughout the remainder of the project, we coded incoming data using coder-determined "chunks" of discourse or text (Evertson & Green, 1986). A "chunk" is defined as a sentence, paragraph, or larger segment of discourse or text that provides evidence of a particular category or theme. After coding subsamples of data sets using the defined categories, we conferred to compare responses, further revise, and resolve differences in coding. Intercoder agreement was defined as the number of "hits" (i.e., both researchers coded the data chunk in the same category) divided by the total number of responses.

In no case was initial intercoder agreement less than .80. We resolved all differences of opinion until we had established 100% agreement. We also highlighted illustrative codes to be included in our report.

The final flow in our data analysis involved drawing conclusions and subsequently verifying them. Conclusions were drawn over time and reported if they were found to be "explicit and grounded" (Glaser & Strauss, 1967). We verified our conclusions by asking Joyce and other participants in the study for their feedback. In all cases they concurred with our findings. We met regularly throughout the project to discuss data analysis procedures and to determine whether additional data were needed.

## FINDINGS

We present our results in the four broad categories that emerged during our data analysis: assessment practices, teaching, consultation, and interpersonal skills. Within each of these categories we describe Joyce's responsibilities as a resource teacher, as a first-year inclusion teacher, and as an experienced inclusion teacher during subsequent years.

### Assessment Practices

Regardless of the service delivery model, Joyce conducted annual reviews of her students' progress using a standardized measure. She also assessed students' day-to-day learning on an informal basis. As an inclusion specialist her evaluations were much more tied to the general education curriculum than they had been previously.

**Resource model.** When she was a resource teacher, Joyce conducted two types of assessment. Once a year she evaluated her students using the *Woodcock Johnson Tests of Achievement* (WJ; Woodcock & Johnson, 1989) to determine how much progress they were making. She recorded the results on students' Individualized Education Plans (IEPs), rewritten once a year as part of an annual review. The second form of assessment involved informal measures of students' progress in the resource room. This type of assessment was not overtly connected to what students were doing in their GE classrooms or to the GE curriculum. Instead, evaluation procedures were determined by what Joyce judged students needed to learn to progress towards meeting the goals on their IEPs. She engaged in task analysis, figuring out what students already knew and needed to learn to master the next skill towards learning to read, write, or do mathematics. Joyce explained that she had "taught that little class (her special education students) as a whole, but it wasn't really what the (general education) teacher was doing."

**First-year inclusion.** As when she was a resource teacher, Joyce continued to administer the *Woodcock*

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*Johnson Tests of Achievement* to her students annually to measure overall progress and to assist in writing updated IEPs. As an inclusion teacher, however, she felt she was more in tune with the classroom assessment procedures used by the GE teacher than she had been previously (e.g., spelling tests, math tests, or a school-wide, competency-based assessment of basic skills) and was better able to develop criterion-referenced, curriculum-based, and authentic assessments that matched the GE curriculum. Also, it became easier to administer behavioral assessment techniques (e.g., behavior rating scales or observations) because she was a regular member of the classroom and could observe students in a nonobtrusive manner. Joyce provided ongoing monitoring of instruction in the GE classrooms and evaluated her students' performances to determine the extent to which curricular modifications or extra assistance were needed. Given that her students usually completed the same assignments as their non-LD classmates, this became much more important in the inclusion model than in the resource model where assignments had been unrelated to the general education curriculum. She provided accommodations for students with LD, such as simplifying the language on tests, shortening the number of problems on a test, providing students with extra time to complete a test, or allowing students to dictate their responses to her rather than write them. Occasionally Joyce developed alternative tests for her students, as with spelling tests that consisted of easier words. Thus, Joyce's evaluations of student progress (other than the WJ) were much more closely aligned with the curriculum covered in the GE classroom than in previous years when she was in the role of a resource room teacher.

Joyce reported that much more *collaborative evaluation* took place when she was an inclusion teacher than previously. During the first year of inclusion, she shared a planning period with her co-teachers (set up deliberately by the assistant principal). This greatly facilitated the collaborative evaluation process. Because instruction took place in the general education setting, it was important that students' assessment, instruction, and curriculum needs be familiar to both teachers. As explained by the GE teachers: "Together we come up with ways of evaluating whether students are learning what we want."

**Subsequent years of inclusion.** After the first year, Joyce no longer shared a planning period with her co-teachers because the administration was not able to arrange teachers' schedules to coincide. Instead, for the next three years, she and the other inclusion teacher were paid extra to come in before or after school to meet. Scheduling became a challenge, however, as teachers tried to juggle their various responsibilities and

meet on a consistent basis. By the fifth year of inclusion, money no longer was available to pay teachers extra for this purpose (because the principal allocated it differently). As a result, co-teachers infrequently met outside of class and the collaborative evaluation process became much more informal. Joyce explained, "We would talk kind of like every once in a while and say, 'Geez, this one is not doing very well,' and we would just do something, but we didn't go through and write notes on everything because they didn't give us a planning period anymore." Joyce lamented that they really were not implementing a cooperative consultation model any longer, "the way it used to be."

Years later when she reflected about the changes in inclusion over the years, she emphasized that collaborative evaluations were easiest during the first year when she was a novice because she had shared a planning time with her co-teachers. The administration had made co-planning a priority, and "it made it wonderful." Without time set aside to meet, co-planning and collaborative evaluations became much more of a challenge.

The IEP process also changed during the last year of this study. Joyce explained, "Now every single quarter, every time there is a grading period, you have to go back for the ESOL level [English proficiency level] and you have to look at the new IEP and you have to look to see if they have mastered any of those skills (written as objectives on the IEP). If they have, then you have to put MASTERED. If not, you have to put STILL TEACHING. The IEP has completely changed from when I was a resource teacher (when she did not have to reevaluate students every quarter). That is why there is so much on my plate. We have to take really a whole day away from kids or more to be able to do that every grading period." Joyce resented the time this increased paperwork took away from teaching.

Another change over the years had to do with a growing emphasis on high-stakes testing. Blue Heron, like other schools in the state, was facing increased pressure to do well on standardized tests. Joyce lamented, "I know that some of our children are unable to take the state tests due to frustration, and to think that those tests are to be counted against the school's ability to obtain funding in the near future is beyond my comprehension."

### **Teaching**

Teaching changed a great deal from the resource room to the inclusion model as well. It now involved co-teaching with the GE teacher, developing and implementing instructional adaptations, providing supplemental instruction, and assisting with homework.

**Resource model.** Joyce liked the sense of autonomy and independence she had felt when she taught in her

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own resource classroom. Yet, she wished that she had had more time to communicate with students' GE teachers. She explained that she "pulled children from many different rooms ... so, there was really not a time to speak with them." Most of the instruction she provided was not connected with what was being taught in students' GE classrooms. She felt that it would have been preferable to communicate more frequently.

**First-year inclusion.** *Co-teaching* was the way Joyce's role changed the most. During that first year she noted, "My role mainly has changed because now I'm sometimes team teaching, and I'm able to help a greater number of students, and I'm able to help my students fit into a regular [classroom]." Joyce reflected further, "With the resource model, there were a lot of students that just kind of fell through the cracks. With inclusion, you are able to help more than just your students. They just figure that I am another teacher in the classroom. They don't see me as being 'special ed.' They see me as being another teacher in the classroom and usually one that will help students that have problems and they want the help ... I liked that."

It was adjusting to co-teaching that provided the greatest challenges to Joyce as a new inclusion teacher. At first she was apprehensive about what it would be like to teach with another teacher. In August of 1993, she was quite concerned about what her new role should be, and how involved and active she should be in the classroom, "I understand we are supposed to kind of like be team teachers in a way. But I'd like to know, what really am I supposed to do?"

One reason for her confusion was that Joyce felt she received mixed messages from district- and school-level administrators regarding co-teaching. She explained, "We were told, 'Joyce should not take the lead teaching a lesson, because that's not what she's paid for.' But I've been told before to collaborate, team teach, not be an aide." This anxiety reflected a concern expressed by all the teachers participating in the inclusion model that first year, "Our main thing is to do it *right*."

Joyce soon found that the ways she co-taught varied from classroom to classroom, and depended on the personalities of her GE partners as well as the needs of the students. Joyce said, "It is a hard role, because the special education teacher continually has to adjust and change their style depending on the teacher that they are working with. I work in all three classrooms very differently." Years later when she reflected about her first year as an inclusion teacher, Joyce felt that this was the greatest challenge she had faced. In part it was because the GE teachers differed in the extent to which they were willing to share control of their classrooms. One teacher wanted Joyce to take the lead when she was in his class. With another teacher Joyce shared control,

teaching together or alternating as lead teacher. The third teacher, on the other hand, preferred to maintain the lead role. Joyce explained, "Most of the time she wants to do the complete class." Thus, an important characteristic of an inclusion teacher is the ability to either take the lead or follow as dictated by the situation. In fact, when later asked to what she attributed the success of the inclusion program, she concluded that the "main thing is being able to work with the home-room teacher."

Another difference was an emotional one that involved "giving up" her kids and her classroom. Even though Joyce felt very responsible for the students with LD in the inclusion classroom, it was not the same as when they came to "her room" and she felt a sense of autonomy with "her students." She said she often missed the special feelings associated with instructing students in the resource room setting. But she quickly followed this by saying that there were also special feelings in the inclusion classroom. Related to this was a lack of personal space. Because she was in "other teachers' classes," she rarely had adequate space for instruction, materials, and her own personal items.

Providing *instructional adaptations* was one of Joyce's key responsibilities. Instructional adaptations were primarily of three types: (a) planned adaptations to assignments completed by the entire class, (b) spontaneous adaptations to assignments completed by the entire class, and (c) alternative assignments for the students with LD. Joyce tried to anticipate the kinds of difficulty students with LD would have with assignments and make adjustments. Many modifications were designed specifically to assist the students with LD but also seemed to benefit the entire class. Joyce sometimes adapted materials ahead of time. While planning with teachers or reviewing their lesson plans, she would note which activities might be difficult for some of the students with LD and then modify assignments while maintaining the overall objectives of the lesson. For example, she explained, "I take home the reading books and I read the story because that way it's fresh in my mind in case I get to class late. If I think the questions [for the story] aren't quite right, I redo the questions." Joyce added that these accommodations seemed to be helpful for all the students in the classroom. She also made some adaptations on the spur of the moment as dictated by students' needs. This type of assistance was typically provided to individual students when they got "stuck" while completing an assignment. Joyce explained that although for the most part the students with LD "fit into what everybody else was doing, sometimes they are going to have to dictate to me, and I will write it down and they will have to copy it. Or they might need a little bit more help, like me questioning them, and like somehow pulling the answers out of



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them." The classroom teacher, an instructional aide, and even other students also provided this type of assistance.

At times Joyce and the GE teachers decided that some of the students with LD would be better off completing an alternative assignment. For example, Joyce typically taught different (easier) spelling words to most of her 2nd- and 3rd-grade students with LD. She would then administer a spelling test to the students with LD at a side table while other students worked individually at their seats on a different assignment. After the spelling test, she often provided direct instruction in phonics to this group. This alternative spelling and phonics instruction was very similar to what Joyce had taught students during previous years in her resource room. She believed that it was important for many of her students to receive this explicit instruction in phonics, particularly because word attack skills were not taught directly as part of the whole-language reading program the school implemented up until the 1998-99 school year.

Despite efforts to provide appropriate instruction within the GE classrooms, Joyce and the GE teachers expressed concerns that the lowest students with LD were not receiving enough instruction at their level. Occasionally, Joyce and a classroom teacher decided that it would be in students' best interest to receive supplemental individualized instruction. For example, Joyce worked with a group of six third-grade students with LD when the rest of their class studied Spanish with a different teacher so that they could get extra instruction in phonics and word attack skills. Joyce was quick to point out that this arrangement differed from the resource model of previous years because students were not missing any instruction from their GE teacher as a result.

Joyce provided homework assistance for students with LD in two important ways. First, she often adapted the homework provided by the GE teacher, either by developing an alternative assignment, shortening the amount of work required, or talking to the GE teacher about applying different standards of evaluation when correcting homework. Second, she started a "Homework Club" that met from 7:45 to 8:15 every morning. As she explained, "The students [with disabilities] come in to see me first thing in the morning to show me their homework. I check it with them and make sure it is right."

**Subsequent years of inclusion.** After the first year, co-teaching became easier as Joyce felt increasingly comfortable and confident in a co-teaching role. She was not as concerned with "doing it right" as judged by others' standards. As the years passed, Joyce and her co-teachers developed different ways of maximizing the benefits of having two teachers in the classroom. For example, they restructured their two-hour language arts

block so that the class was divided into fourths (which they referred to as "centers"). Each teacher worked with one group of students for a half-hour on a specific activity, such as the writing process or Making Words (Cunningham & Cunningham, 1992; Cunningham & Hall, 1994), and then the groups rotated. Joyce reflected, "In the last couple of years, we had a lot more of this going on than in the beginning of inclusion where it was almost all whole-class instruction, and I might have co-taught a lesson and afterwards spent time with my children. In the last two years, we have had a lot of our centers and I feel that it has been great. We've had less cooperative consultation, but we've had more of the small-group instruction." It might also be said that over the years Joyce looked for ways to simplify her role. Her first year as an inclusion teacher was characterized by countless extra hours of work. During subsequent years she didn't put in quite as much additional time preparing modified materials for her students or working with them before and after school.

Joyce noticed changes over the years in the ways in which her GE partners provided instruction to their students with LD. They became more positive, accepting, and encouraging. Joyce noted, "They got to where even with students that were not performing as well, they would always recognize the good things that they did, so that other students could see that they are good, too. That makes a big difference in the social aspect of our students. They might not know how to write it as well, but they have the ideas and they could participate, and our kids felt more at ease and the teachers recognized that."

Joyce described additional changes she has experienced over the years in inclusion, some of which have challenged the inclusion model and brought about frustration. First, she said, "The amount of time we must spend outside of the classroom has increased due to teacher trainings, IEPs, CSTs [Child Study Team meetings], ESOL testing, yearly testing, illness, etc., and this leaves our children without their ESE [Exceptional Student Education] teacher (more often than before)." When special education teachers are required to miss instructional time with their students, no substitute teachers are hired to take their place and provide coverage. Joyce believes this policy should change.

Second, Joyce contends that high-stakes achievement testing has affected the co-teaching model. Administrators and teachers have experienced increased pressures to do well on these tests "at all costs," which has caused conflict with students' IEP goals. She said, "The [GE] teacher lets us know what is expected because they are the ones that are mandated, especially this year with the FCAT [Florida Comprehensive Assessment Test]. We have to fit in our goals and everything from the IEP, but they are more or



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less telling us ‘this is what has to be done.’” Joyce felt discouraged because she perceived that her students’ needs were not receiving enough priority. She elaborated, “Their needs are so much greater than the other children in the classroom ... sometimes (before) when I saw that their needs weren’t being met, I made time within that classroom period in those two hours to try to work with them alone. But this year it is much harder to do because of the emphasis on the FCAT.”

### **Consultation**

By necessity, consultation was much more prominent in the inclusion model than in the typical resource model. The aspect of consultation that received the most emphasis by the participants in this study was planning.

**Resource model.** Joyce spent virtually no time co-planning as a resource teacher. She explained, “What I used to do when I only had a couple of students who were in different classes, I would go before school once a week and say ‘what are you teaching this week?’ like in math, and that was about it.” Co-planning had not seemed necessary when she was a resource teacher. She was able to teach what she wanted and did not have to “worry” about what they were doing in the GE classroom. A GE teacher described the resource model in this way, “We did communicate a great deal, especially when it came to followup and if I had any problems, since she worked with the students more closely than me and she was more in touch with the parents. As far as planning together, just projecting where we wanted to go, we did not. She had her own agenda last year and I had my own because we were working in different areas.”

**First-year inclusion.** During the first year, the administration allocated mutual planning time to Joyce and her co-teachers. These meetings took place at a set time once a week, in the middle of the day while special subject area teachers (e.g., Spanish, art, or music) taught their students. At the beginning of the year these meetings were scheduled for 60 minutes, but eventually they were cut to 30 minutes so Joyce could spend more time working with students. Teachers “discussed the planning for the following week and how we could best work together.” Once a month they went over the goals and objectives from students’ IEPs and discussed “if we were meeting them or if we needed to switch over to another one if they have accomplished that goal, and we discussed that in-depth.” As part of these efforts, they also completed a collaborative consultation form for each student with LD, recording students’ progress, setting goals, and planning interventions. In addition, Joyce sometimes developed her own plans when she saw that students needed extra help, and explained her

planning this way: “When it comes to planning, I make my own individual plans, but they correspond with the plans of the teacher.” Her plans were designed to meet the students’ IEP objectives and to help them achieve success in the GE classroom.

As with the actual teaching, the nature of the collaborative consultation meetings varied depending on the personalities and styles of the individuals involved. At first one GE teacher took the lead when planning, while in another case Joyce took the lead. Planning meetings became more collaborative over time. All teachers involved were enthusiastic about the collaborative consultation process. One GE teacher noted, “I think it’s a great thing. We really do have a feel for our children, all of our children, more than ever before.” However, teachers sometimes complained that they felt “bogged down” with the large amount of paperwork required by the additional planning.

Joyce was very conscientious about making sure that the services students received matched their IEPs. She noted, “I make sure the IEPs correspond with the goals of the GE classroom and then I monitor the students based on their IEPs.” In September that first year, she met with parents and rewrote IEPs so that they were in compliance. She met with district office personnel ahead of time to ensure that she did this correctly. GE teachers also frequently referred to students’ IEPs when they discussed instruction and planning. This was a dramatic departure from the resource model years when the GE teachers had been much less aware of students’ IEP goals. Yet, they sometimes felt discouraged when their students with LD were not making faster progress. One GE teacher explained, “It’s frustrating when you look at their papers and think, ‘They don’t get it.’ But then you have to think, even if they spell every single word in a sentence wrong, they capitalized the first letter, and they put a period at the end. And that was an [IEP] objective.” Reflecting about this years later, Joyce noted, “That was the hardest thing for the teachers at first.”

Part of Joyce’s role was sharing her expertise with GE teachers regarding how best to work with students with LD. For example, she shared with classroom teachers “when to make a big deal” about a child’s relative successes and to provide positive reinforcement. She also counseled teachers not always to have the same expectations for students with LD, and reminded them that students with LD often need more time to complete a task. Joyce sometimes found it difficult to make suggestions to classroom teachers, particularly regarding changes she thought should be made but that they might be resisting. For example, one teacher seemed to target instruction towards higher performing students. Joyce’s goal was to get this teacher “to gear lessons

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towards the middle, and provide enrichment activities for those who finish early." Also, this teacher's grading procedures were a continuing concern. Joyce advised her to "count the things right, not the things wrong" and "at the end of a test, don't tell the whole class what everybody's grade is — grades are private."

**Subsequent years of inclusion.** After the first year, because the administration no longer arranged teachers' schedules so they could meet during the school day to plan, teachers met before or after school. Joyce had no planning period. She said, "I was coming in at 7:30 a.m. and leaving at about 4 p.m. daily and still had two or three hours of work to do at home, at least four days of the week." Co-planning became easier when teachers began using centers more regularly, however. Joyce explained, "We didn't have to write things down unless we saw a child with a special need and I might have to do something for behavior, a behavior modification thing. We planned more for groups and I might be in charge of a certain group and the other teacher would do another center." She added, "Other than that, the only thing that has changed is that we don't have to do cooperative consultation every month, we more or less do it informally. We don't have to fill out all those papers because now we have so much more that has to go on the IEP [e.g., quarterly information about how students are progressing]. The IEP is terrible now ... I really feel that they are going to lose a lot of special ed. teachers."

### Characteristics of Joyce: An Inclusion Teacher

**Interpersonal skills.** Joyce's co-teachers used many adjectives to describe her personality, such as *sensitive*, *considerate*, *nonjudgmental*, *supportive*, *adaptable*, and *flexible*. As one GE teacher explained, "She is the most flexible person. She goes from three classrooms with totally different teaching styles. And, she is always positive, she just adapts." Joyce concurred that it is important to be adaptable. She advised, "The main thing is that she [an inclusion teacher] has to be a very flexible teacher. And be able to take into consideration how the other teacher is going to feel. It's like a marriage, it has to be with two compatible people who can talk things out." Also, "You have to be willing to hear other people's suggestions."

**Sense of responsibility.** Joyce felt a strong sense of responsibility for the education of the students with LD, referring to them as "my students." As the GE teachers noted, "She is so conscientious and concerned." As evidence of this sense of responsibility, Joyce gave up her personal planning time to provide additional assistance to students. She felt responsible for the learning, mastery, and personal welfare of each of the students with LD in the classroom. If they were

not keeping up or did not understand a lesson, she never blamed the students, but instead felt compelled to figure out a way to ensure that they made progress in their learning.

**Advocacy.** Joyce was also an advocate for her students. She believed that it was her responsibility to look out for each of her students in their GE classrooms as well as around the school. For example, when one teacher announced to the entire class that one girl with LD had received an "F" on her spelling test (even though she had spelled five words correctly, more than on any previous spelling test), Joyce became visibly upset. She waited until the students had left the room and then spoke privately with the teacher, convincing her that it was not fair for this girl to receive an "F" when she had spelled five words right, and dissuading her from divulging students' grades publicly in the future.

**Sense of autonomy.** Joyce felt that the school's administration allowed her a great deal of leeway in deciding how to implement the inclusion model. She was told, "Do it however you feel is going to be best." This sense of being trusted and respected by the administration seemed valuable in enabling her to take risks as she explored her new role as an inclusion teacher. She also felt that she had the "ear" of the administrators if she needed assistance. "I know I can always go to Kathy [the assistant principal] and she will listen and problem solve with me."

**Respect.** Joyce was respectful of the teachers with whom she worked. She discovered early on that GE teachers had curriculum and student demands that exceeded her understanding and that GE teachers were faced with different priorities than hers. She learned to respect the struggle GE teachers experienced while trying to cover content objectives and curriculum and yet "slow down" so students can learn.

**Philosophy of learning.** Joyce believed in and modeled the philosophy that all students can learn. She stressed the importance of treating all students in the class as important, contributing members of the community. After working with Joyce for several months, one GE teacher noted, "We have these kids trained so that they know they have the power to do the work. Other teachers say, 'I don't give them the books because they can't do anything,' but that isn't how we do it in my room." This teacher told about a third-grade girl with disabilities who had been in another classroom where "they wouldn't even give her books because her ability was so low." The third grader cried every morning and clung to her mother when she dropped her off at school. Three days after she was transferred to the inclusion classroom, "she was coming to school smiling and saying, 'I love you.'"

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## DISCUSSION

The goal of the case study presented in this article was to describe the changing roles of an LD teacher and to clarify how her responsibilities differed as a resource room teacher, a first-year inclusion specialist, and an experienced inclusion specialist.

What did we learn? Joyce's role as an inclusion teacher for students with LD was complex and multifaceted and depended largely on her successful interpersonal and communication skills. Much of the knowledge and skills she required was a blend of (a) special education assessment and intervention skills, (b) the ability to creatively adapt and accommodate instructional lessons and assignments to meet the needs of students with LD in a whole-class setting, (c) an understanding of the general education curriculum and goals, (d) the ability to collaborate and co-plan with GE teachers, and (e) commitment and dedication.

How did being an inclusion teacher differ from being a resource room teacher? The most obvious difference was co-teaching. Joyce found this change in her role the most difficult as she struggled to adjust to the different personalities and styles of her co-teachers. We believe that the extent to which co-teaching is acceptable to teachers is highly relevant and influences their success and satisfaction with their roles in an inclusion model.

Along with co-teaching came the need to co-plan. In the inclusion model planning became more complicated. Whereas as a resource teacher Joyce had asked herself, "What is the best way to teach the objectives listed on the IEP and meet this student's individual needs?" as an inclusion teacher she asked herself and her co-teacher, "What is the best way to teach the objectives listed on the IEP and at the same time help the student fit in and be successful in the GE classroom?" Thus, the curriculum and goals of the GE classroom drove instructional decision making to a much greater extent. An inclusion teacher must be knowledgeable about the general education curriculum, skillful in anticipating student difficulties with learning tasks, and adept at providing ongoing adaptations and accommodations. As has been described elsewhere (e.g., Friend & Cook, 1992; Pugach & Johnson, 1995; West & Idol, 1990), co-teaching and co-planning necessitate (a) communicating frequently and effectively with another professional, (b) sharing power and control over assessment and instructional decisions, and (c) being flexible.

One of the greatest challenges Joyce faced as an LD inclusion teacher was maintaining a focus on the needs of the individual within the context of the GE classroom. Baker and Zigmond (1995) found that the LD inclusion teachers at their five school sites replaced concern for the individual with concern for the group

once they were confronted with the demands of the GE class. It was our impression that Joyce was able to maintain a focus on the needs of her individual students with LD, but that doing so was difficult and labor intensive. For example, during her first years as an inclusion teacher, when she felt an individual student would not be able to complete an assignment designed for a group (even with adaptations), she developed an alternative activity that she felt would be more appropriate. But she was less likely to do this in later years.

How did the inclusion model at Blue Heron change over the years? In some ways it became easier, as teachers grew accustomed to working with one another and learned to co-teach more effectively. All teachers involved with inclusion spoke very favorably about the rewards of the model for teachers, and especially students. They valued what they learned from working collaboratively, and felt that students grew both socially and academically. Yet, in other ways, inclusion became more challenging over the years as administrative support at the school waned and external changes from national, state, and local levels added pressure and stress to the job. Barriers included (a) lost collaborative planning time, (b) increased paperwork due to requirements for more extensive and more frequently updated IEPs, (c) additional responsibilities outside of the classroom, (d) increased class size, (e) a growing emphasis on high-stakes testing, and (f) pressure to do well in the state's new school grading system. These obstacles were similar to those faced by others implementing inclusion (Fisher, Sax, & Grove, 2000; Walther-Thomas, 1997), and point to a need for ongoing commitment and support if successful inclusion models are to be maintained.

**Limitations.** The generalizability of this study is limited because we tracked the career changes of only one individual. However, although it is possible that Joyce's adjustments and reactions to her changing role were idiosyncratic, based on our understanding of the relevant literature we do not think this was the case. It should also be kept in mind that there was a strong researcher presence in the school throughout the seven years of this study. We know that our role in validating and supporting Blue Heron's emerging inclusion model influenced everyone involved at least to some extent (see Klingner, Arguelles, Vaughn, & Ahwee, 2001, for an in depth examination of the school's inclusion program).

**Implications.** It is our belief that the role of the LD inclusion teacher cannot adequately be performed by a GE teacher serving in a teaming role, or by a paraprofessional working as an assistant. The responsibilities of the LD inclusion teacher require a sophisticated set of knowledge and skills that can take years to learn and develop (Baker & Zigmond, 1995). In an optimal arrangement,

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the LD inclusion teacher must be an expert in teaching students with LD, and at the same time be informed about the GE curriculum and various teaching approaches. Conversely, all GE teachers who work with students with LD should receive some preservice and inservice information about LD, but should also be experts in the general education curriculum and a variety of teaching approaches. In this way, general education and special education teachers can complement each other, with each possessing a different area of expertise and an awareness and appreciation of the other's strengths. The reciprocal nature of their interactions should be conducive to an effective collaborative relationship (Johnson et al., 1988).

How should inclusion teachers be prepared for their role? First, we observed that Joyce's training as an LD specialist served her well in her new role as an inclusion teacher. Her knowledge of special education, IEPs, assessment, instructional practices, and methods of making adaptations and accommodations was necessary in her role as a resource room teacher and an inclusion teacher. These skills were also highly valued by the GE teachers with whom she worked. Thus, the demands of the inclusion role might best be met by special education teachers who have experience in providing intensive, individualized instruction. Additionally, Joyce needed three other sets of skills that the literature suggests (Bos & Vaughn, 1994; Pugach & Johnson, 1995) are not adequately taught in teacher preparation programs: (a) consultation and communication with other professionals, particularly GE teachers; (b) knowledge of the general education curriculum and skills in adapting this curriculum; and (c) knowledge of instructional approaches appropriate for heterogeneous GE classrooms, and how to implement them in a co-teaching situation.

Successful inclusion is unlikely to occur unless general and special education professionals share possession of the skills necessary to adequately meet the needs of students with disabilities in the GE classroom. Although the results of this case study are not generalizable, they do provide food for thought. As increasing numbers of students with disabilities are educated in GE classrooms, preservice and inservice teacher education programs must address how best to prepare both GE and special education teachers for their roles (McLeskey et al., 1999).

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