**BOARD MEMO – ACTION ITEM**

**PUTNAM COUNTY COMMUNITY UNIT SCHOOL DISTRICT #535**
*Providing Foundations Together, Cultivating Individual Growth*

To: Board of Education

From: Cody Martzluf, Superintendent
Jodi Peterson, Director of Student Services

Date: Tuesday, November 17, 2026

RE: 2026-2027 Special Education Workload Plan

**Recommendations:**

Approve 2026-2027 Special Education Workload Plan

**Background:**

- Under 23 Illinois Administrative Code 226.735, the Illinois State Board of Education (ISBE) requires school districts to establish and maintain workload limits for special education personnel. The purpose of this requirement is to ensure that special education teachers and related service providers have sufficient time and resources to deliver the services outlined in students' Individualized Education Programs (IEPs).

- A Special Education Workload Plan establishes a framework for evaluating and managing the responsibilities assigned to special education personnel. Unlike a traditional caseload model, which primarily considers the number of students assigned to an educator, a workload plan considers the full range of responsibilities necessary to meet students' educational needs.

- The District's Special Education Workload Plan provides a framework for monitoring staff responsibilities, evaluating workload concerns, and making adjustments when necessary. The plan is intended to ensure that:

    - Students receive the special education and related services required by their IEPs.

    - Staff workloads remain manageable and consistent with applicable state requirements.

    - Administrators have a consistent process for evaluating staffing assignments and service delivery needs.

    - Workloads can be reviewed and adjusted as student needs and responsibilities change throughout the school year.

- ISBE does not require districts to submit workload plans for state approval. However, districts must maintain documentation locally and make it available for review when necessary. ISBE also encourages districts to review and update their plans regularly.

- A special thanks to our Director of Student Services, Jodi Peterson, for completing this updated plan and all her efforts to ensure the District continues to meet its obligations to students with disabilities.

**PUTNAM COUNTY COMMUNITY UNIT SCHOOL DISTRICT #535**
**Workload Plan Framework for Special Educators**

## Introduction:

Pursuant to administrative regulations promulgated by the Illinois State Board of Education (23 Illinois Administrative Code 226. 735), all school districts are required to adopt a workload plan, to be in effect starting with the 2009-2010 school year. The workload plan establishes guidance on workload of special educators so that all the services on a student's individual education plan (IEP) can be provided at the level specified on the IEP. In this revised plan the committee expanded "Special Educators" to mean certified/licensed staff and educational support personnel which include, but are not limited to:

- Certified Special Education teachers
- School Psychologists
- Social workers
- Speech and language pathologists
- Occupational therapists
- Physical therapists
- Orientation and mobility therapists
- Deaf and hard of hearing therapists
- Vision therapists
- Adaptive P .E. teachers
- Behavior interventionists
- Assistive technology specialists
- Special education administrators

## Purpose:

The purpose of the Workload Plan is to make recommendations on the workload of the Special Educators employed by Putnam County School District #535 so that all services required under students' Individualized Education Plans (lEPs), as well as all needed ancillary and support services, can be provided at the requisite level of intensity based on each student's identified needs. The workload plan is a framework outlining components to consider when evaluating workload responsibilities. It is **not intended to quantify** the components of workload. The plan is intended for Administration along with Certified and Licensed Special Education staff members to be able to examine the factors contributing to the workload of the special educators. The document is meant to examine all areas affecting each educator's workload. It is not intended to be contractual in nature or otherwise rigid in its application as flexibility is key to providing a free and appropriate education to students with individual educational programs.

## Workload vs. Caseload:

Workload is **not** caseload. ***Caseload*** refers to the number of students with IEPs for whom the Special Educators are responsible. Each student is counted as one, **regardless of the student's needs or severity of the disability.**

***Workload*** refers to all the responsibilities required of Special Educators and is based upon the intensity of the students' needs. Due to the Response to Intervention (Rtl) process, Special Educators are at times responsible for instruction beyond their caseload (students identified with IEPs). Consideration of Rtl responsibilities should be included when conducting a Workload Analysis. Environmental factors influencing the delivery of service including instructional space, travel, preparation of materials, the utilization of paraprofessionals and ready access to instructional materials will be considered. Additional environmental factors may be identified and applied to the workload analysis as pertinent.

Administration will determine Special Educators' workload on a yearly basis taking into consideration data collected on the **five components** of the workload plan. District Administration will review the collected data to determine whether to recommend to the board adjustments in staffing, workload, or other accommodations for the District's Special Educators.

Special Educator workload will be based on the analysis of:
I) Individualized instruction;
2) Consultative services and other collaborations among staff members;
3) Attendance at IEP meetings and other staff conferences;
4) Case management, paperwork and reporting; and
5) Crisis management and social emotional duties.

Special Educators may also request a meeting to review their existing workload if workload conditions change during the school year and would like administration to review their workload. Any Special Educators desiring such a review should schedule a meeting with their immediate Administrator and/or Director of Student Services. The Special Educator may, at the meeting, present data in each of the five components to discuss with their administrator. The Administrator, Director of Student Services, and the Special Educator will review whether any change in workload is necessary to address the Special Educator's workload concern and, if so, develop possible options and strategies to address the workload concern.

## Components:

### *1. Individualized instruction:*

Individualized instruction is the amount of instructional services needed to meet the unique needs of each student and/or the unique instructional delivery system in each program. Individual instruction includes academic, functional, and social emotional needs. The

amount of direct service minutes delineated on each student's IEP will be taken into account. Additionally, the number of curricula and preparation required, as well as the intensity of services needed and/or the severity of the student's disability will be considered. Individualized instruction also considers the variety of service delivery models ranging from complete push-in to the general education classroom to pull-out services. Data collection around individualized instruction workload will include direct IEP minutes, class size, class groupings, individual and master schedules, and service delivery models.

The District is committed to complying with the class size (number of students in special education classroom during any particular academic instructional period) limits set forth in Illinois Administrative Code 23, Section 226.730. (appendix A)

***2. Consultative services and other collaborations include, but is <u>not limited</u> to:***

- Time spent observing students,
- Escorting private providers for school observations,
- Providing input to teams,
- Collecting/sharing behavior data,
- Functional Assessment of Behavior (FBA) and Behavior Intervention Plans (BIP) are required IEP components for students needing significant behavior interventions.
- Likewise, additional collaboration may include, but is <u>not be limited</u> to:
    - weekly team meetings,
    - modeling and training with team members (including Paraprofessionals and Substitutes),
    - mentoring new staff,
    - collaborating with General Education teachers for team-teaching,
    - meeting with Administrators,
    - developing instructional service modifications and accommodations (including assistive technology and programming augmentative communication devices).

Consultative services may be indicated on a student's IEP and refer to the amount of minutes delineated for a Special Educator to consult with service providers to effectively deliver the student's IEP. Consultative services also refer to the amount of time needed to discuss a student's instructional program with staff members, administrators, parents, and private providers on behalf of the student.

The workload plan analysis for consultative services and other collaborations shall include data collected. Data collection will include IEP consult minutes, IEP Supplementary Aids and Services, Support to staff, parent communication, communication and collaboration

with private providers, modeling and training, material modifications/adaptations, and developing FBAs and BIPs.

### *3. **Attendance at IEP meetings and other staff conferences***

- Many Special Educators are required participants in meetings. Attendance at IEP meetings and other staff conferences may include, but are not limited to:
    - Annual Reviews
    - Transition meetings
    - Domain meetings
    - Eligibility meetings
    - Intake meetings
    - Additional IEP Meetings (Amendment. Transfer in. Functional Analysis of Behavior and Behavior Intervention Plans. revisions. etc.)
    - Crisis and/or problem-solving meetings
    - Parent Teacher Conferences
    - Building/District meetings
    - Housekeeping meetings
    - 504 meetings

The workload plan analysis for attendance at meetings and staff conferences shall include:

- Data collected on the number and typical length of time for meetings
- Time to prepare paperwork for meetings
- The number and typical length of time for team meetings prior to a meeting
- Consideration of number of buildings for traveling staff

### *4. **Case management, paperwork and reporting***

The collaboration and compilation of information required to complete each student's IEP and evaluations should be considered as part of a Special Educator's workload. The amount of time needed to complete paperwork is not a part of specific time delineated for individualized instruction. The IEP is an essential part of each student's instructional program and is mandated by Federal and State Regulations. A distinction must be made between required administrative paperwork and reports as part of the General Education requirements and those unique to the workload of Special Educators.

The workload plan analysis for paperwork and reporting will include the typical amount of time required to complete a student's IEP and/or evaluation report throughout the school year. These time requirements include, but are not limited to:

- time required to update students' IEPs and BIPs,
- to seek parents, private provider, and/or paraprofessional input,
- to progress monitor,
- to test,
- time necessary for any additional reporting.

Data collection for case management responsibilities will include, but are not limited to:

- Collaboration with outside providers
- Parent communication
- Day-to-day scheduling issues/changes
- Management of crises
- Creation of individual and group student schedules
- Behavior management
- Private evaluation/report intake
- Planning meetings
- Transition planning
- Communication with team members
- Screenings
- Collection of data
- Creation of Functional Analysis of Behavior and Behavior Intervention Plan
- Distribution of necessary paperwork before and after the IEP meeting

### *5. Crisis Management and Social Emotional Duties*

Certain times require Special Education staff to respond to unexpected social/emotional student needs and/or crisis situations. Time devoted to crisis management may take away from instruction or completion of other workload components. The amount of time Special Educators spend on managing these unpredictable social/emotional needs should be considered as part of a Special Educator's workload. The workload plan analysis for crisis management and social emotional duties shall include:

- Time required to develop, follow, and evaluate Functional Assessments of Behavior (FBA) and Behavior Intervention Plans (BIP);
- Time spent with students while in crisis;
- Time required to communicate with other team members, parents, outside providers, or outside agencies regarding student crises
- Time required to meet and complete coping/debriefing forms and additional paperwork arising from a crisis incident
- Time required to collaborate on threat assessments

Additionally, the workload plan analysis for crisis management and social emotional duties shall include consideration of time required to compensate for missed service minutes or non-student contact minutes.

Appendix A.

23 Illinois Administrative Code 226:
Section 226.730 Special Education Class Size Regulations

| Staff | Class size | Class size with addition of 1 paraprofessional |
|---|---|---|
| Early Childhood Teachers | 1-5 | 5-10 |
| Special Ed Teachers - EEC 01 (within Special Education 20% or less of school day) | 1-15 | 15-17 |
| Special Ed Teachers - EEC 02 (within Special Education 21% - 60% of school day) | 1-10 | 10-15 |
| Special Ed Teachers - EEC 03 (within Special Education 61% or more of school day) | 1-8 | 8-13 |
| Speech Pathologist | 1-60 | - |
| Psychologist | 1-999+ | - |
| Social Worker | 1-420 | - |
| Nurse | 1-750+ | - |
| Adapted PE Teachers | 1-35 | - |

**Each student is counted as one, **regardless of the student's needs or severity of the disability.****

Appendix B.

2026- 2027 Putnam County School District #535 Workload Plan Analysis

| Staff | FTE | # of students served | FTE Aides |
|---|---|---|---|
| Early Childhood Teachers | 1 | 8 | 3 |
| HS Special Ed Teachers | 3 | 38 | 6 |
| JH Special Ed Teachers | 2 | 27 | 6 |
| Elementary Special Ed Teachers | 2 | 16 | 4 |
| Primary Special Ed Teachers (k-2) | 1 | 13 | 5 |
| Speech Pathologist | 2 | 77 | - |
| Social Workers | 3 | 758 | - |
| Nurse | 2 | 758 | - |
| Vision Itinerant | .06 | 2 | - |
| Hearing Itinerant | .03 | 1 | - |
| Occupational Therapy | .09 | 10 | |
| Physical Therapy | .06 | 2 | |
| Orientation & Mobility | .03 | 1 | - |
| Psychologist | .60 | 758 | - |
| Director of Student Services | 1 | 758 | - |

**Each student is counted as one, **regardless of the student's needs or severity of the disability.****
****These numbers fluctuate throughout the school year as students' needs are identified, students move in/out of the district, and/or students are dismissed.**