



Oak Park Elementary School District 97

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To: Members, Board of Education
Dr. Carol Kelley, Superintendent of Schools Board of Education

From: Laurie Campbell, Assistant Superintendent for Human Resources *JMC*
Eboney Lofton, Senior Director of Special Education *eu*

RE: Special Education Workload Plan

Date: April 24, 2018

The Illinois special education regulations state that each district shall adopt a plan which establishes limits on the workload of special educators so that all of the services on a student's individualized education plan (IEP) can be provided at the level specified by the IEP. According to Section 226.735 of the Illinois Administrative Code, workload limits shall be developed in cooperation with the entity's affected employees, and where there is an exclusive representative, in accordance with the Illinois Education Labor Relations Act. Workload limits are to be based on an analysis of the activities of the District's special educators including but not limited to:

1. Individualized education;
2. Consultative services and other collaboration among staff members;
3. Attendance at IEP meetings and other staff conferences; and
4. Paperwork and reporting.

In 2009, District 97 developed the required Workload Plan according to the requirements in Illinois Code. However, the plan had not been revisited or revised since its initial development in 2009. In February of 2018, District 97 assembled a group of special education staff to assist with the review and updating of the District 97 Special Education Workload Plan. The Special Education Workload Plan Committee met five times from February through April, conducted a survey of special education staff, and revised the District 97 Special Education Workload Plan.

The Special Education Workload Plan will be posted on the District 97 website and will be distributed to all District 97 special educators.



Oak Park Elementary School District 97 Special Education Workload Plan

Revised March 2018



Introduction: District 97 will ensure that there is sufficient staff available so that all services required under students' IEPs can be provided at the levels necessary to allow the student to meet his/her goals. The Illinois special education regulations state that each district shall adopt a plan which establishes limits on the workload of special educators so that all of the services on a student's individualized education plan (IEP) can be provided at the level specified by the IEP. The workload plan has been effective since 2009. The most recent update occurred in March of 2018.

Class Size: Class size is defined as the total number of students an educator serves during any designated special education class. As referenced here "class" means any circumstance where only students with IEPs are served and at least one special education teacher is assigned and provided instruction and/or therapy exclusively to the students with IEPs. Class sizes for students with IEPs is set forth in Illinois School Code Section 226.730 and included as Attachment A. District 97 will not exceed its targeted caseload or class sizes established by ISBE or district targeted caseloads.

Workload vs Caseload:

This plan addresses the issue of workload versus the traditional caseload concept. The plan provides a model for examining the workload of special educators in the District. This model is intended as a framework, not to dictate numbers, but to adapt to the changing tasks, responsibilities, and requirements of the District's special educators. Through careful analysis of the various responsibilities required in the plan, the District will be better able to respond proactively to the challenges of planning for and providing services to the District's students with disabilities.

Workload is not caseload. In caseload, the reference is to the number of students with IEPs for whom the special educators are responsible. Each student is counted as "one" no matter what the students' needs are or the severity of the students' disabilities. Workload refers to all of the responsibilities required of special educators and is based upon the intensity of students' needs; provision of individualized instruction, time for consultation, collaboration, and problem-solving; attendance at IEP meetings and staff conferences, paperwork and reporting; and other educationally related factors such as: 1) quality professional development to increase the special educators' skills in state-of-the-art and research-based instruction and problem-solving, 2) quality instructional materials designed to enhance and extend the instructional experience, 3) adequate classroom instructional space, 4) equipment and technology support, 5) mentoring support, 6) support staff and professionals, 7) supervisory support and assistance, 8) individual student needs, 9) parents and outside providers, and 10) state class size requirements and professional organization work.

Schedule Submission: Each special educator shall review and submit a schedule including instructional minutes and number of students served to the Senior Director of Special Education and the building principal at the start of each trimester. If, at any time, the schedule shows the

special educator is approaching limits, the special educator shall notify the Senior Director of Special Education and the building principal.

IEP Review: At least each trimester, the case manager will review all his/her students' IEPs and be sure that:

- a. All relevant general education staff receive a copy of the students' pertinent IEP information
- b. All related services are scheduled, and
- c. All recommended technology and/or equipment, as listed on the IEP, is available.

Special Educator Defined: For the purposes of this Workload Plan, special educators will be defined as follow: Special Education Teacher, Nurse, Occupational Therapist, Physical Therapist, Psychologist, Speech Language Pathologist, Adaptive Physical Education Teacher, and Social Worker.

Process for Addressing Workload Concerns:

If a special educator believes that his/her workload is too difficult to adequately meet the needs of students, the following would occur:

- a. The special educator will schedule a meeting with his/her evaluator to discuss the concern.
- b. The special educator would bring to this meeting the data, including service minutes, consultation time, and other requirements indicating that the workload is unmanageable and the special educator and the evaluator would develop a plan to address the concern.
- c. A contact between the evaluator and the special educator would be made within 2-4 weeks to determine if the plan has been effective.

If a group of special educators with the same responsibilities believes that their workload is too difficult to adequately meet the needs of students, the following would occur:

- a. The special educators will schedule a meeting as a group with the district special education administration.
- b. The group would bring to this meeting the data, including service minutes, consultation time, and other requirements indicating that the workload is unmanageable. The group and the administration would develop a plan to address the concern.
- c. The district special education administration would make contact with the group in 2-4 weeks to determine if the plan has been effective and to make revisions if necessary.

Activities Analysis: This workload plan is based on an analysis of the activities for which special educators are responsible and shall encompass but are not limited to:

1. Direct Service/Individualized instruction - Individualized instruction/direct service is the amount of student contact time needed to provide instructional services which meet the individual needs of each student as noted in student IEPs.
2. Consultative services and other collaboration with team members and/or professionals - 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, families, or professionals to effectively deliver the student's IEP. Consultative services and other collaboration among team members and/or other professionals may also include:
 - a. Consult minutes as listed in the IEP

- b. Amount of time spent to discuss a student with staff members, administrators, parents and outside providers
 - c. Weekly team meetings
 - d. Common planning time with general education teachers or other special education staff/team collaboration
 - e. Creating modifications/accommodations
 - f. Data collection for progress monitoring
3. Attendance at IEP meetings and other staff conferences - Staff members are required to participate in student IEP meetings including annual reviews, initial and triennial evaluations, transition plans, FBA/BIP and Domain meetings for students assigned as part of a special educators' caseload as well as student IEP meetings or problem solving meetings in member districts as assigned. Examples of attendance at IEP meetings and other staff conferences include:
- a. Staff and parent conferences pertaining to the planning of special education services and/or the review/analysis of data driving student interventions
 - b. Actual attendance required at IEP meetings averaged over the school year.
 - c. Attendance at required problem-solving meetings or staff conferences pertaining to the planning of special education services and/or the analysis of student data.
4. Paperwork and reporting - Paperwork is related to student IEP development/progress monitoring and compliance, including conducting evaluation and compilation of information to complete each student's IEP and evaluations. This inclusive of paperwork aligned to the meetings outlined above as well as Medicaid billing.
5. Crisis management - Certain times require special education staff to respond to unexpected social/emotional student needs and/or crisis situations. The amount of time special educators spend on managing these unpredictable situations should be considered as part of a special educator's workload. The workload plan analysis for crisis management and social emotional duties shall include:
- a. Time spent with students while in crisis
 - b. Time required to communicate with other team members, parents, outside providers, or outside agencies regarding student crises
 - c. Time required to meet and complete coping/debriefing forms and additional paperwork arising from a crisis incident
 - d. Time required to collaborate on threat assessments

A special educator's schedule will allow for items #1-5 as well as planning time, travel time (if applicable), and a duty-free lunch.

Annual Review of Workload Plan: This plan will be reviewed on an annual basis and revised if needed.

Plan Development: This plan was developed through collaboration between District 97 administration and representatives from the Oak Park Teachers Association.

Original Committee Members (2009)		2018 Committee Members	
Barnato, Connie	SLP	Loffton, Eboney	Sr. Director Sp. Ed.
Chilton, Sarah	Instructional Teacher	Campbell, Laurie	Ast. Supt. HR
Ciosek, Anne	SLP	Hodge, John	Principal
Clarke, Catherine (Cat)	Instructional Teacher	Richardson, Kathryn	OT
Curtis, Pat	Psychologist	Maciak, Matthew	Psychologist
Durckel, Gail	Resource	Mura, Susan	Social Worker
Glover, Donna	Psychologist	Rossi, Andrea	School Nurse
Hill, Dulcie	Resource	Ciosek, Anne	SLP
Iamartino, Joyce	Nurse	Highland, Crissi	Resource
Klein, Katie	PT	Meglan, Christopher	Multi-Needs
Lesniewski, Susan	Instructional Teacher	Shaw, Robert	Resource
Matthews, Denise	Resource	Krypton, Jordan	ECSE
Pyne, Maureen	Instructional Teacher		
Ryan, Nancy	OT		
Smith, Kari	Social Worker		
Stollberg, Mary	Coordinator		
Umeki, Joann	SLP		
Ward, Margaret	OT		
Youngblood, Mona	OT		

Attachment A:**Joint Committee on Administrative Rules
Administrative Code****TITLE 23: EDUCATION AND CULTURAL RESOURCES****SUBTITLE A: EDUCATION****CHAPTER I: STATE BOARD OF EDUCATION****SUBCHAPTER f: INSTRUCTION FOR SPECIFIC STUDENT POPULATIONS****PART 226 SPECIAL EDUCATION****SECTION 226.730 CLASS SIZE FOR 2009-10 AND BEYOND**

a) When a student's IEP calls for services in a general education classroom, the student must be served in a class that is composed of students of whom at least 70 percent are without IEPs, that utilizes the general curriculum, that is taught by an instructor holding an educator license for general education and who is employed for that purpose, and that is not designated as a general remedial classroom. For purposes of this subsection (a), a student who receives speech services outside of the general education classroom and who does not require modifications to the content of the general education curriculum shall be included in the calculation of the percentage of students without IEPs. (See 105 ILCS 5/14-2.)

b) Class size means the total number of students an educator serves during any special education class. As used in this subsection (b), "class" means any circumstance in which only students with IEPs are served and at least one special education teacher is assigned and provides instruction and/or therapy exclusively to students with IEPs. In the formation of special education classes, consideration shall be given to the age of the students, the nature and severity of their disabilities, the educational needs of the students, and the degree of intervention necessary, subject to the limitations of this subsection (b).

1) Except as provided in subsection (b)(5), classes in which all the students receive special education services for 20 percent of the school day or less shall have at least one qualified teacher for each 15 students in attendance during any given class. However, the district may increase the class size by a maximum of two students when a paraprofessional educator is provided for the entire class.

2) Except as provided in subsection (b)(5), each class in which any student receives special education services for more than 20 percent of the school day but no more than 60 percent of the school day shall have at least one qualified teacher for each 10 students in attendance during that class. However, the district may increase the class size by a maximum of five students when a paraprofessional educator is provided for the entire class.

3) Except as provided in subsection (b)(5), each class in which any student receives special education services for more than 60 percent of the school day shall have at least one qualified teacher for each eight students in attendance during that class. However, the district may increase the class size by a maximum of five students when a paraprofessional educator is provided for the entire class.

4) Each class for children ages three through five shall have at least one qualified teacher for each five students in attendance during that class. However, the district may increase the class size by a maximum of five students when a paraprofessional educator is provided for the entire class.

5) For any school year in which the amount of State reimbursement for teachers identified in Section 14-13.01 of the School Code [105 ILCS 5/14-13.01] exceeds the amount in effect on

January 1, 2007 by at least 100 percent and no corresponding reduction has been made in other State sources of support for special education:

- A) The maximum class size stated in subsection (b)(1) shall be 13 rather than 15;
 - B) The maximum class size stated in subsection (b)(2) shall be eight rather than 10; and
 - C) The maximum class size stated in subsection (b)(3) shall be six rather than eight.
- 6) The provisions of subsections (b)(1) through (5) notwithstanding, class size shall be limited according to the needs of the students for individualized instruction and services.
- c) The maximum class sizes set forth in subsection (b) shall, if necessary, be further restricted at the local level to account for the activities and services in which the affected educators participate in order to provide students with IEPs the free, appropriate public education in the least restrictive environment to which they are entitled.

(Source: Amended at 40 Ill. Reg. 2220, effective January 13, 2016)

Attachment B: Data from Analysis of Activities (hours per week)

1. Direct Service/Individualized Instruction							
	<i>Social Workers</i>	<i>Speech Language Pathologists</i>	<i>Psychologist</i>	<i>Physical Therapists</i>	<i>Occupational Therapists</i>	<i>Special Education Teacher</i>	<i>Nurses**</i>
On behalf of identified special education	EC: 10 hours K-5: 20-25 hours 6-8: 17.5-30 hours	15-20 hours	N/A	10-12.5 hours	15-20 hours	EC: 10-12.5 hours per section K-5: 30 hours 6-8: 17.5-30 hours	EC: 0-30 minutes K-5: 1-2 hours 6-8: 1-2 hours
On behalf of non-identified students	EC: 0-30 minutes K-5: 5 hours 6-8: 6 hours	1.5-2 hours	1.5-2 hours	N/A	1-1.5 hours	EC: 0-30 minutes K-5: 1.5-2 hours 6-8: 1-1.5 hours	1-5 hours
2. Consultative Services and Other Collaboration*							
	<i>Social Workers</i>	<i>Speech Language Pathologists</i>	<i>Psychologist</i>	<i>Physical Therapists</i>	<i>Occupational Therapists</i>	<i>Special Education Teacher</i>	<i>Nurses</i>
On behalf of identified special education	12-15 hours	3.5-4 hours	3.5-5.5 hours	4-6 hours	EC/K-5: 5.5-12.5 hours 6-8: 15-17 hours	EC: 2.5-4 hours K-5: 3-5 hours 6-8: 1.5-2 hours	1.5 hours
On behalf of non-identified students	1-2 hours	1.5-2 hours	1.5-2 hours	0-.5 hours	2.5-3 hours	EC: 0-.5 hours K-5: 0-1 hour 6-8: 1.5-2 hours	3-4.5 hours
3. Attendance at IEP Meetings and Other Staff Conferences							
	<i>Social Workers</i>	<i>Speech Language Pathologists</i>	<i>Psychologist</i>	<i>Physical Therapists</i>	<i>Occupational Therapists</i>	<i>Special Education Teacher</i>	<i>Nurses</i>
Amount of time per IEP conference	Initial & Re-eval: 1.5-2 hours Annual & Other: 1-1.5 hours	Initial & Re-eval: 1.5-2 hours Annual &	Initial & Re-eval: 1.5-2 hours Annual &	Initial & Re-eval: 1.5-2 hours Annual &	Initial & Re-eval: 1.5-2 hours Annual & Other: 1-1.5 hours	Initial & Re-eval: 1.5-2 hours Annual & Other: 1-1.5 hours	Initial & Re-eval: 1.5-2 hours Annual & Other: 1-1.5 hours

		Other: 1-1.5 hours	Other: 1-1.5 hours	Other: 1-1.5 hours			
4. Paperwork and Reporting							
	<i>Social Workers</i>	<i>Speech Language Pathologists</i>	<i>Psychologist</i>	<i>Physical Therapists</i>	<i>Occupational Therapists</i>	<i>Special Education Teacher</i>	<i>Nurses</i>
Amount of preparation time spent prior to IEP meeting	Initial & re-eval: 4-4.5 hours Annuals: 0.5-1 hour	Initial & re-eval: 2.5-3 hours Annuals: 1-2 hours	Initial & re-eval: 6-9 hours Annuals: N/A	Initial & re-eval: 4.0-4.5 hours Annuals: 2.-2.5 hour	Initial & re-eval: 4.0-4.5 hours Annuals: 3-3.5 hours	EC: -Initials: N/A -Re-eval: 2.5-3 hours -Annuals: 1-1.5 hours K-5: -Initial & re-eval: 1-3 hours -Annuals: 1-1.5 hours 6-8: -Initial & re-eval: 2-2.5 -Annuals: 2-2.5 hours	1.5-2 hours
5. Crisis Management							
	<i>Social Workers</i>	<i>Speech Language Pathologists</i>	<i>Psychologist</i>	<i>Physical Therapists</i>	<i>Occupational Therapists</i>	<i>Special Education Teacher</i>	<i>Nurses</i>
Crisis Management	3-3.5 hours	0.5 hours	0.5 hours	0.5-1 hour	1-1.5 hours	EC: 0-0.5 hours K-5: 0-1 hours 6-8: 0-0.5 hours	0-1 hour

***Note:** We define consultation and collaboration time as follows:

Consult minutes as listed in the IEP

Weekly team meetings

Creating modifications/accommodations

Data collection for progress monitoring

Amount of time spent to discuss a student with staff members, administrators, parents & outside providers

Common planning time with general education teachers or other special education staff/team collaboration

Data collection for trimester reporting (IEP updates)

Training

****Note:** This data does not include 504 case management duties.