ATTRACT
PREPARE
RETAIN

OPTIMISE

OPENING THE PIPELINE OF TALENT INTO MICHIGAN'S SPECIAL EDUCATION

ENERGY INTO ACTION

RECOMMENDATIONS FROM THE WORKLOAD/CASELOAD ACTION TEAM

There is a critical shortage of special education teachers that directly affects student outcomes. It was identified that workload was a factor that impacts staff attraction/retention. Use of a caseload model does not account for the specific needs of individual students that impact the workload within a program or related services being provided to students. Workload has been a concern expressed by both teachers and related service providers. In addition, challenges were identified relative to the Michigan Administrative Rules for Special Education (MARSE). MARSE programming ratios don't match needs, therefore students receive inequitable services. Current MARSE rules lack clarity regarding student population (i.e. eligibility areas) serviced in resource programs.

The OPTIMISE Core Team recognized workload/caseload as a barrier to attracting and retaining qualified staff for individuals with disabilities in Michigan. In May of 2024 a Workload/Caseload Action Team met for an in-person work day that resulted in the identification of three recommendations. These recommendations are as follows:

a. Workload Calculator - with timelines established (Beginning/Middle of the year or when caseload drastically changes) potential ranges, and broken into program or itinerant
b. Define explicit responsibilities of each discipline
c. Identify data and analyze to determine the potential revision of the MARSE rules (ISD Plans, other states, staff perceptions, district data, etc.)

Through a coordinated Action Team process, two arms of the original team surfaced: Programs and Related Service Providers. Each Sub-action team identified the rationale, data needed, and barriers to overcome to make deliverable recommendations. The team met in a virtual meeting in September of 2024 to review the information gathered in May and prepare for a virtual meeting with sub-action teams that left this meeting with homework to review various program or related service workload calculators. The group met again in a virtual meeting in October and worked in sub-action teams to initiate the recommendations for each group. The meeting had to continue and regroup in another virtual meeting in December to continue work on workload calculators, one for program and one for itinerant. There was a second virtual meeting in December to look at MARSE language and job responsibilities.

During these two meetings, there was an overwhelming response that there should not be one calculator that would be recommended to the Michigan Department of Education (MDE), rather a bank of calculators as a resource to districts. It was felt that a workload calculator should be decided on by the Intermediate School District/Regional Education Service Agency, and that a platform be identified as a location to store the calculators for access by districts.

The team was brought back together on February 24, 2025 to review survey results from the group on the agreement to not identify one specific calculator, but to identify a resource hub that could be used for the storage of the various calculators that are already in use. MAASE and SEILN currently have MI-SERC being developed as a state resource hub on a variety of educational information. This is a potential site to maintain the compilation of workload calculators for either programs or itinerants. There will be a vetting process incorporated for all calculators added to the MI-SERC resource hub.

Recommendation #1:

Recommend a "resource library" of workload calculators that have a formula to evaluate student needs and programming that provides specially designed instruction that is based on individual student needs rather than student areas of disability. MI-SERC would be the recommended "resource library" identified for maintaining the workload calculators.

A workload model allows for caseloads to be based on individual needs, regardless of disability. It would ensure that special education providers are allocated adequate time to meet the needs of individuals with disabilities in their care. Through the use of workload, districts would have time to examine staffing levels and the extent to which student needs are being met.

Recommendation #2:

Recommend a change to MARSE language that incorporates the consideration of workload in the development of caseloads.

The current language within MARSE does not address workload except in *R340.1745 Services for students with speech and language impairment*. There is no other language within MARSE that addresses workload for programs or services.

A workload model allows for individualized practices based on student needs, regardless of disability. It would ensure that special education providers are allocated adequate time to meet the needs of the individuals with disabilities in their care. Through the use of workload, districts would have time to examine staffing levels and the extent to which individual needs are being met.

Proposed MARSE Rule Change - R 340.1733--Workload / Caseload Calculator

(k) The determination of caseload size for an authorized provider of special education programs or services shall be made by utilizing a workload calculator in cooperation with the district director of special education, or his or her designee, and the building leaders of the school or schools in which the individuals with disabilities are enrolled. Caseload size, while not exceeding maximums established by MARSE language, shall be based upon the severity and multiplicity of the disabilities and the extent of the service defined in the collective individualized education programs of the students to be served, allowing for time and consideration for all of the following:
(i) Diagnostics.

(ii) Report writing.
(iii) Consulting with parents and teachers.
(iv) Individualized education program team meetings.
(v) Documentation & requirements to comply with federal, state and district mandates.
(vi) Travel.

Individual caseloads of authorized program or service providers shall not exceed the maximums established by MARSE language, and shall be adjusted based on the factors identified in subdivision (k) of this rule.