

There is more than paperwork!

Preparing pre-service Special Education teachers for the daily tasks of case management

Colleen E. Commisso

Brittany Severino

Abstract

This pilot study integrated various case management activities within two special education courses to better prepare pre-service teachers for the complex requirements of their soon-to-be career. Analysis of 27 pre-and post-tests revealed a significant increase in preparedness, particularly in paperwork, organization, handling unexpected daily requests, and responding to parent concerns.

About the Authors

Dr. Colleen Commisso is an associate professor of special education at West Chester University and previously worked as a high school special education teacher in Pennsylvania.

Dr. Brittany Severino is an assistant professor of special education at West Chester University and previously worked as a high school special education teacher in Pennsylvania.

Direct correspondence by email to ccommisso@wcupa.edu.

Teacher attrition is a significant issue plaguing the country, with more casualties in special education than in any other certification (US Department of Education, 2025). Younger, less experienced Special Education Teachers (SETs) exhibit higher rates of burnout compared to veteran teachers (Brunsting et al., 2014; Bettini et al., 2017). Almost a third of newly hired SETs leave the field within three years of employment, never obtaining tenure status (Cancio et al., 2018). For decades, researchers have explored the root causes of this extreme shortage and teacher turnover. This research has found that among SETs, responsibilities of caseload management have caused elevated levels of burnout (Billingsley, 1993; Billingsley & Bettini, 2019; Caballero, 2024; Hagaman & Casey, 2018).

Research has investigated the components related to caseload management that impacted feelings of burnout, which can lead to attrition. Hagaman and Casey (2018) found that new SETs noted that the high number of students on their caseload made it nearly impossible to provide special education services to each student and took away time from their teaching. In addition to high caseload numbers and the complex tasks associated with caseload management are stressors for new and experienced SETs. Similarly, Billingsley and Bettini (2019) conducted a review of 25 research articles published between 2002 and 2017 on SET attrition, and found that completing paperwork, unmanageable workload, and coordination and support from additional IEP team members were key working conditions or demands increasing attrition. Furthermore, a meta-analysis conducted by Park & Shin (2020) found that self-efficacy and stress were significantly related to burnout dimensions (i.e., emotional exhaustion, depersonalization, and personal accomplishment). Given this research, changes need to occur at all levels to help ensure certified SETs are fulfilling positions and remaining in those positions (Billingsley, 1993).

One change proposed by researchers (Billingsley & Bettini, 2019; Caballero, 2024; Hagaman & Casey, 2018) is focusing on how pre-service SETs can be better equipped to handle the complexities of caseload management before entering the classroom. Incorporating this training in teacher preparation programs is important given that less experienced teachers are more likely to leave a position compared to experi-

enced teachers (Billingsley & Bettini, 2019). One of the largest protective factors for burnout is self-efficacy or belief in one's own ability to succeed (Kim & Seo, 2018). Usher and Pajares (2008) found that the most powerful source of teacher self-efficacy is mastery experiences, which are successful encounters with a task that enhance a teacher's belief in their ability to succeed (Bandura, 1986). Teacher preparation programs can provide pre-service SETs with mastery experiences before being hired in a full-time position, thus increasing their self-efficacy and reducing the risk of burnout.

Although all teacher preparation programs require a student teaching experience to help soon-to-be certified SETs demonstrate their ability to teach and manage a caseload, this experience is often too short and is unable to fully replicate natural demands, as the student teacher typically shadows their mentor teacher without managing an entire caseload. Instead, teacher preparation programs should consider how pre-service SETs can practice and demonstrate the difficult skills of caseload management alongside their required coursework before student teaching. These accompanying skills include, but are not limited to, responding to parent concerns, addressing student issues, collecting progress monitoring data, collaborating with fellow IEP team members, conducting and attending various types of meetings.

Literature Review

Few studies have explored specific components of caseload management in isolation. IDEA (2004) requires parent participation throughout the Individualized Education Program (IEP) process as a case manager's responsibility. Mandell and Murray (2005) found that most pre-service special education programs rely on fieldwork rather than coursework for students to experience parent communication, which limits their preparedness. Scholars have emphasized the importance of further developing standalone courses by adding assignments specific to parent communication, such as generating parent interview questions, engaging in class discussions, and providing reflection opportunities (Mulholland & Blecker, 2008; Strassfeld, 2018).

IDEA (2004) also requires students to be educated in the Least Restrictive Environment (LRE), which is the general education classroom, to the greatest extent

possible. For students with diverse disabilities to be successful in the LRE, collaboration with general education teachers is another case manager's responsibility. Da Fonte and Barton-Arwood (2017) identify several recommendations for preparing pre-service SETs for this responsibility within coursework, including discussion of time management strategies, creating fact sheets to summarize a student's IEP or disability, and practicing effective communication strategies.

Additionally, caseload management requires completing the necessary special education paperwork for students. Mehrenberg (2013) interviewed 18 novice SETs from around the United States to discover that most participants felt their pre-service training did not adequately prepare them for the paperwork requirements of being a caseload manager or the multitasking involved in completing this paperwork alongside other responsibilities. Furthermore, pre-service SETs must be prepared to discuss paperwork, progress monitoring data, and concerns at IEP meetings. Several studies have engaged pre-service SETs in simulated IEP meetings to identify increased awareness of understanding the IEP process, team member roles, and collaboration required (Mason, 2011; Toledo, 2023; Werts et al., 2002). However, no studies have required pre-service SETs to engage in all the tasks necessary to come to an IEP meeting prepared or how to handle unexpected situations that arise during the school day as a SET (e.g., emails, student concerns).

Being able to effectively navigate all requirements of case load management is essential for success as a SET; however, the expectations of case management are often discussed and explained in isolation without teaching preservice teachers how to organize and prioritize the tasks required. This is evident in the current research, as no known studies have been found on the teachings and impacts of case management skills on pre-service SETs, emphasizing the critical need for research in this area.

Research Questions

1. Do pre-service SETs perceive higher levels of preparedness for the various roles of case management (e.g., paperwork, data collection, parent communication, IEP team collaboration, meetings, unexpected events, and prioritizing time) after completing a case management activity in-

tervention when comparing pre-test to post-test results?

- b. Which case management activities warrant the most significant growth in pre-service SETs' level of preparedness?
- c. Which case management activities warrant the least growth in pre-service SETs' level of preparedness?

Method

Research Design

The researchers implemented a pretest-posttest design with IRB approval during a 15-week semester for this pilot study. The pre-test and post-test included 13 Likert-scale items regarding specific tasks or requirements of case management that the researchers embedded within two required courses in the Department of Special Education at a mid-sized public university in Southeastern Pennsylvania. The first course, a methods course for supporting secondary-aged students, reviewed co-teaching and adaptation of instruction for standalone Special Education PreK-12th-grade majors. The second course was an assessment course that reviewed the law and requirements for creating essential documents such as the Reevaluation Report (RR) and Individualized Education Program (IEP) for double majors pursuing certification in Special Education PreK-12th grade, and Early Grades PreK-4th grade, or Middle Grades 4th-8th grade. Both courses met in person weekly for approximately two and a half hours of in-person instruction.

Pre-service SETs received a caseload with approximately 18 students receiving learning support services. They also received a copy of their daily schedule including their contractual start and dismissal time, push-in or pull-out classes, lunch, and prep. Pre-service SETs were required to prepare and complete the case manager activities within their school day, versus trying to use time outside of school. The instructors purposely required this to help pre-service SETs engage in time management, but also to help create a manageable workload and work-life balance. The following case management skills and activities were integrated within both courses, and aligned with items on the pre-and post-tests.

Paperwork Requirements

Each Pre-service SET's caseload included students' names, special education service(s), last RR date, and last IEP date. Pre-service SETs created a spreadsheet to identify when each student's new IEP was due, new RR was due, as well as 60 and 90 days before the RR due date to begin collecting data and determine if new testing is required. Pre-service SETs then used this information to create a monthly calendar (Figure 1) to organize their daily prep time and meetings. Next, students used backward planning to map when they would request or collect data, write each document, send reminder emails to the IEP team for the upcoming meetings, and conduct the meetings. Two items were on the pre-and post-test regarding the skills practiced related to paperwork requirements, including how prepared the pre-service SETs felt to organize a school year of compliance due dates for a caseload of students (e.g., RR, IEP) and how to manage their daily prep time to accomplish the required paperwork.

Data Collection

For one student on their caseload, the pre-service SETs analyzed data collection sheets to create progress monitoring reports for five annual IEP goals, including academic and functional needs. Pre-service SETs created a progress report for the marking period and drafted an email home to the students' parents explaining the progress report. Additionally, pre-service SETs created monthly calendars to keep track of who, when, and what tools would be used to collect data on each IEP goal for each student on their caseload. Aside from data collection, the pre-service SETs also learned that there could be additional requirements that need time allocated on their monthly calendars. For example, some students have an IEP accommodation that requires their case manager to send weekly updates to their parents regarding grades, academic performance, and behavior. Lastly, students practiced identifying accommodations needed in the students' classes by creating a spreadsheet of accommodations required for students with an IEP in their classes. Three items were on the pre-and post-test regarding the skills practiced related to data collection, including how prepared the pre-service SETs felt to analyze data and create progress reports, communicate with parents about academic and behavioral updates connected to data,

and manage students' accommodations and their effectiveness.

Parent Communication

Pre-service SETs practiced drafting an email to parents regarding progress monitoring data (described above) and had the opportunity to practice additional forms of electronic communication with parents. Pre-service SETs received an email from a parent on their caseload with a concern and responded by submitting a recorded phone call that addressed the concern and outlined next steps. Conversely, pre-service SETs received a concern about a student on their caseload and drafted an email to parents explaining the issue and requesting additional information. Lastly, pre-service SETs created and maintained a parent communication log to document all email and phone call communication. Three items were on the pre-and post-test regarding the skills practiced related to parent communication, including how prepared the pre-service SETs felt to respond to parent concerns or requests electronically, initiate contact with parents regarding a student concern, and document parent communication.

IEP Team Member Collaboration

Pre-service SETs completed several activities to practice communicating with fellow teachers and related service providers. The pre-service SETs drafted an introductory email to their fellow general education colleagues. Additionally, pre-service SETs practiced drafting emails to general education teachers or related service providers requesting data for a student's IEP goal, general input for the upcoming IEP, or specific input to address parent concerns. Two items were on the pre-and post-test regarding the skills practiced related to collaboration, including how prepared the pre-service SETs felt to request data and discuss student concerns with fellow teachers and related service providers.

Meetings

Pre-service teachers engaged in a mock IEP meeting reviewing a student's new RR and IEP in a small-group setting or engaged in a one-on-one back-to-school meeting with a parent. In both scenarios, the parents brought up concerns or specific questions for the special education teacher to address on the spot and in

a face-to-face meeting. One item was on the pre-and post-test regarding the skills practiced related to meetings, including how prepared pre-service SETs felt to address parent concerns during in-person meetings.

Unexpected Events

Pre-service SETs received several unexpected “events” during the middle of class sessions. The goal of these events was to simulate situations in which the pre-service SETs had to respond in the moment without being able to consider, think, discuss, and make a decision. Each event posed a problem that a case manager could face during the school day, such as a student on their caseload coming to their classroom upset in the middle of a lesson, or they receive a call while teaching that a student on their caseload was just involved in a fight in the cafeteria. After the event was read aloud to the students, the pre-service SETs had two minutes to type how they would approach it or resolve it. One item was on the pre-and post-test regarding the skills practiced related to unexpected events, including how prepared pre-service SETs felt to handle unexpected situations that arise during the school day.

Prioritizing Time

In addition to spur-of-the-moment events, the pre-service SETs were given a variety of different tasks required of them at the start of their school day (Figure 2) that were associated with their responsibilities of being a case manager. Examples included providing read-aloud for a test due to staff absences, responding to a principal’s email requesting information, or completing behavior rating scales for the school psychologist. Pre-service SETs prioritized the order in which they would respond or complete each task, identify how and when they would do it, and any other IEP team members they would contact. One item was on the pre-and post-test regarding pre-service SETs’ ability to prioritize the daily tasks of being a case manager, including when and how they would complete those tasks.

Participants

There were 35 pre-service SETs between the two class sections, including juniors (71%, n=25), seniors (20%, n=7), and sophomores (9%, n=3). The researchers administered the pre-test to all participants during the

first class session, with 32 responses providing consent. The researchers administered the post-test during the last class session, with originally 32 responses providing consent. However, after reviewing the data, the researchers removed five responses because most of the survey responses were incomplete. This removal left 27 pre-service SETs who completed the post-test in its entirety and provided consent.

Data Analysis

The pre-test and post-test had 13 Likert-scale items specific to the various case management skills practiced throughout the semester. These questions started with, “How prepared do you feel to...”, with the specific skill following, such as “...respond to parents regarding concerns they have about their child?” Pre-service SETs had four answer options, which included 1) not prepared, 2) somewhat prepared, 3) mostly prepared, and 4) very prepared. The researchers initially analyzed these items using descriptive statistics (Table 1). The researchers converted each response to an assigned value (1-4) to compare the pre-test and post-test scores to determine if the pre-service SETs made adequate growth or if the embedded case manager activities positively increased pre-service SETs’ level of preparedness for all aspects of case management (Table 2). The Wilcoxon Signed-Rank test was used, as an alternative to dependent t-test, to compare each survey item due to the sample size being less than 30 pre-service SETs and the survey using a 4-point Likert scale (Hollander et al., 2014). Additionally, each pre-service SETs pre-test and post-test responses were aggregated to single scores to compare overall differences.

Additionally, the pre-test and post-test included two open-ended questions, one of which was different, and one of which remained the same. On the pre-test, the pre-service SETs described personal or professional experiences they obtained outside of required field courses. This helped the researchers determine the pre-service SETs’ background knowledge before beginning the intervention or case management practice. On the post-test, the pre-service SETs identified which case management assignments they found most beneficial and which skill(s) they would like additional practice with. This question would further clarify the quantitative results and be used by researchers as a reflexive piece in making future course improvements.

Table 1*Pre-Test and Post-Test Descriptive Statistics*

Survey Items		Response Options				M	SD
		Not Prepared	Somewhat Prepared	Mostly Prepared	Very Prepared		
Organizing compliance due dates (e.g., RRs and IEPs)	Pre-Test	45%	48%	6%	0%	1.5	0.71
	Post-Test	0%	19%	44%	37%	3.0	1.41
Organizing time to complete paperwork requirements	Pre-Test	27%	58%	12%	3%	1.0	0.00
	Post-Test	0%	11%	70%	19%	3.0	0.00
Planning when and how to collect data	Pre-Test	21%	52%	21%	6%	2.5	2.12
	Post-Test	0%	15%	56%	30%	3.0	0.00
Analyzing and reporting data for progress monitoring	Pre-Test	18%	55%	24%	3%	3.0	1.41
	Post-Test	0%	19%	59%	22%	3.5	0.71
Contacting teachers to discuss student concerns	Pre-Test	6%	24%	55%	15%	3.0	1.41
	Post-Test	0%	4%	44%	52%	4.0	0.00
Requesting data from teachers or related services	Pre-Test	9%	42%	45%	3%	2.5	0.71
	Post-Test	0%	4%	44%	52%	4.0	0.00
Documenting parent communication	Pre-Test	21%	42%	30%	6%	3.0	1.41
	Post-Test	0%	0%	37%	63%	4.0	0.00
Responding to parents' concerns (e.g., email, phone)	Pre-Test	18%	39%	42%	0%	2.5	0.71
	Post-Test	0%	7%	56%	37%	3.5	0.71
Contacting parents with concerns	Pre-Test	18%	39%	42%	0%	3.0	0.00
	Post-Test	0%	7%	56%	37%	4.0	0.00
Ensuring accommodations are correctly implemented	Pre-Test	30%	48%	21%	0%	2.0	1.41
	Post-Test	0%	15%	63%	22%	3.0	0.00
Responding to parents' concerns during meetings	Pre-Test	27%	52%	21%	0%	2.0	0.00
	Post-Test	0%	11%	74%	15%	3.0	0.71
Handling unexpected situations	Pre-Test	21%	52%	27%	0%	2.5	0.71
	Post-Test	0%	15%	74%	11%	3.5	0.71
Prioritizing your daily tasks as a case manager	Pre-Test	21%	64%	15%	0%	2.0	0.00
	Post-Test	0%	7%	74%	19%	3.5	0.71
Overall	Pre-Test					1.75	0.35
	Post-Test					3.25	0.35

The pre-test and post-test both asked pre-service SETs to define a case manager and their responsibilities. This was utilized as another measure to document the potential growth of pre-service SETs and the effectiveness of the intervention. The researchers reviewed each open-ended question using pre-determined codes and then analyzed the responses for themes.

Results

The purpose of this study was to investigate the impact of instruction on case management skills on SETs' perceptions of preparedness related to case management skills. Table 1 displays the pre-test and post-test results for the 13 Likert-scale items; however, the pre-test re-

Table 2*Wilcoxon Signed-Rank Test (N=27)*

Survey Item	<i>p</i> -value	<i>r</i>	Z	W
Organizing time to complete paperwork requirements	<i>p</i> < .001	.89	4.39	0
Responding to parents' concerns or questions during meetings	<i>p</i> < .001	.90	4.44	0
Organizing compliance due dates (e.g., RRs and IEPs)	<i>p</i> < .001	.88	4.24	0
Prioritizing daily tasks as a case manager	<i>p</i> < .001	.90	4.33	0
Ensuring accommodations are correctly implemented	<i>p</i> < .001	.89	4.09	0
Responding to parents' concerns (e.g., email, phone)	<i>p</i> < .001	.89	4.02	0
Documenting parent communication	<i>p</i> < .001	.88	3.87	0
Requesting data from teachers or related service providers	<i>p</i> < .001	.84	3.98	7.5
Analyzing and reporting student data for progress monitoring	<i>p</i> < .001	.84	3.89	8
Handling unexpected situations	<i>p</i> < .001	.84	3.78	6.5
Contacting parents with concerns	<i>p</i> < .001	.79	3.71	17
Planning when and how to collect data for parent updates	<i>p</i> < .001	.72	3.61	32
Contacting teachers to discuss student concerns	<i>p</i> < .002	.75	3.02	11
Overall	<i>p</i> < .001	.87	4.53	0

sponses are from 32 pre-service SETs, and the post-test responses are from 27 pre-service SETs who completed the survey in its entirety. Based on this snapshot of descriptive statistics, all elements of caseload management indicate a decrease in pre-service SETs identifying feeling not prepared or somewhat prepared, and an increase in feeling most prepared or very prepared for every item. On the pre-test, pre-service SETs identified seven skills they did not feel very prepared for, specifically contacting or responding to parent concerns in an electronic or face-to-face environment. Additionally, pre-service SETs identified the highest ratings of feeling not prepared on the pre-test with their ability to organize compliance due dates (45%), ensuring accommodations are correctly implemented (30%), organizing time to complete paperwork requirements (27%), and responding to parent concerns during meetings (27%).

On the contrary, no pre-service SETs felt "not prepared" for any of the 13 case manager skills on the post-test. Items with the highest level of self-reported "very prepared" include documenting parent communication (63%), contacting teachers to discuss student concerns

(52%), and requesting data from teachers or related service providers (52%). The mean and the standard deviation for the 27 participants' responses on the pre-test and post-tests that could be paired are reported in Table 2. Each item exhibits an increase in the overall mean and a low standard deviation, signaling that the responses are close to the mean to help reduce variability and increase reliability.

Comparing Pre-Test vs. Post-Test Quantitative Results

The researchers used the Wilcoxon Signed-Rank test to determine if the null hypothesis could be rejected for each Likert-scale item to determine if the pre-service SETs reported a higher level of preparedness on the post-test compared to the pre-test results. The researchers selected the Wilcoxon Signed-Rank test to analyze the difference between the two related groups. However, the researchers completed undersizing of the majority group (pre-test data) due to the unequal sample sizes, with more completed responses in the pre-test versus the post-test data. The researchers implemented randomization to compare 27 pre-test responses (out of the 32 collected) to the 27 post-test

responses obtained. The data was aggregated to provide each pre-service SET with a single average pre-test and post-test score. Overall, there was a significant large difference between the pre-test (Mdn = 2.1, n = 27) to post-test (Mdn = 3.2, n = 27), $Z = 4.5$, $p < .001$, $r = 0.9$. This finding indicates the case manager project had a substantial impact on pre-service SETs' perceived preparedness.

Furthermore, Table 2 displays the Wilcoxon Signed-Rank test results for each individual item. The researchers found all 13 items, specific to elements of case management, significant at the $p < .05$ level. Seven items indicated a significant large difference with all pre-service SETs post-test results larger than pre-test results ($W=0$), including organizing time to complete paperwork, responding to parent concerns in-person, organizing compliance due dates, prioritizing daily tasks, implementing accommodations, responding to parent concerns digitally, and documenting parent communication. The item with the highest standard deviation above the average included responding to parents' questions or concerns in-person from pre-test (Mdn = 2, n = 27) to post-test (Mdn = 3, n = 27), $Z = 4.4$, $p < .001$, $r = 0.9$. This was followed by the ability to organize time to complete paperwork requirements from pre-test (Mdn = 2, n = 27) to post-test (Mdn = 3, n = 27), $Z = 4.4$, $p < .001$, $r = 0.9$. On the contrary, contacting teachers to discuss student concerns, while still significant, resulted in the lowest difference from pre-test (Mdn = 3, n = 27) to post-test (Mdn = 4, n = 27), $Z = 3$, $p = .002$, $r = 0.8$. This was followed by the pre-service SETs' level of preparedness to collect data for parent updates from pre-test (Mdn = 2, n = 27) to post-test (Mdn = 3, n = 27), $Z = 3.6$, $p < .001$, $r = 0.7$.

Qualitative Items

While the pre-test and post-test mainly relied on quantitative data collection with 13 Likert-scale items aligned with each element of case management that was reviewed and practiced in the courses, participants also responded to several open-ended questions to help gather additional information to support the quantitative findings. These items were brief in nature, but helped provide some further explanation to the pre-service SETs' Likert-scale responses, as their level of preparedness was self-reported.

Evolution of Case Management Definition

The pre-test and post-test asked pre-service SETs, "How would you define caseload management and what tasks would you include in managing a special education caseload?" The researchers purposely added this qualitative question to determine the participants' growth in their knowledge of caseload management, not just preparedness for each skill. Out of the 32 pre-test responses, four participants responded, "I don't know." Most of the remaining responses (93%) identified caseload management as being responsible for "overseeing", "handling", or "helping" an assigned set of students receiving special education services. However, more than half of the pre-service SETs (55%) were only able to identify one example or task that is involved in caseload management. Most ($n=20$) identified paperwork requirements (e.g., IEP) as the main or only responsibility. This responsibility was followed by progress monitoring ($n=8$), collaboration with colleagues ($n=6$), meetings ($n=6$), communication with parents ($n=5$), and advocating for students ($n=1$). Overall, the pre-service SETs seemed to have a broad idea of what caseload management was, but little insight into specific responsibilities.

All 27 pre-service SETs who completed the post-test were able to define caseload management in their own words, with no response indicating "I don't know". Participants commonly defined being a case manager as "supervising", "keeping track of", "organizing", and "balancing" the needs of an assigned group of students receiving special education services. Most participants (63%) identified three or more tasks or responsibilities included in caseload management. Similar to the pre-test, paperwork was noted most often ($n=20$) as a main responsibility. Additionally, similar but slightly higher mentions of progress monitoring ($n=10$), meetings ($n=7$), communication with parents ($n=7$), and collaboration with colleagues ($n=6$). However, several new themes were identified in the post-test definitions. Pre-service SETs identified the importance of time management and organization to prioritize the various tasks ($n=7$) described as "the way you delegate your time" and "considering where and when you, as an educator, have time to efficiently get all your work done." This theme was followed by supporting daily unexpected needs of students ($n=7$), mentoring or ad-

vising fellow faculty to implement IEPs (n=2), and one comment on figuring out how to have a proper work-life balance. The increase in the number and type of codes for this item supports the overall quantitative findings that the case manager project had a significant impact on the pre-service SETs' ability to identify and complete the various aspects of case management from pre-test to post-test results.

Most Effective Assignments and Areas for Improvement

The last item on the post-test asked pre-service SETs which assignment(s) they felt best prepared them for the responsibilities of caseload management. More than half (52%, n=14) identified all of the case manager activities to be beneficial as they helped students understand “the real life of special education teachers.” Four students identified creating a calendar (Figure 1) to organize compliance due dates for a school year (e.g., RRs, IEPs) as most helpful in being “realistic” and “realizing how important time management and

organization is.” This supported the quantitative findings of organizing prep time to complete paperwork requirements and organizing compliance due dates for a school year being in the top three most significant increases in preparedness from pre-test to post-test results (Table 2). Three students identified that they most benefited from additional practice learning how to write RRs and IEPs. Two students enjoyed getting to create their daily schedule to “become familiar with the responsibilities,” and two students benefited from the unexpected events (Figure 2), addressing IEP team member concerns. One student preferred creating a parent communication log, and one student identified practicing how to collect data.

This item also asked pre-service SETs if there were any additional responsibilities or aspects of caseload management that they wished they had the opportunity to learn or practice in either course. Most participants (78%, n=21) were satisfied with the variety of case management activities by stating “no” or identifying “I don’t believe so” or “I felt the activities we

Figure 1

Case Manager Paperwork Calendar: Pre-Service SET Example

March				2025		
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 PREP: Erica’s IEP Task #2	3 PREP: Erica’s IEP Task #3	4 PREP: Erica’s IEP Task #4	5 PREP: Erica’s IEP Task #5	6 PREP: Erica’s IEP Task #6	7
8	9 PREP: Erica’s IEP Task #7	10 PREP: Sam’s RR Task #1	11 PREP: Sam’s RR Task #2	12 PREP: Sam’s RR Task #3	13 PREP: Sam’s RR Day 60 Send to School Psychologist	14
15	16 PREP: Send Erica’s Draft IEP and Meeting Reminder	17 PREP: Dan’s IEP Task #1	18 PREP: Dan’s IEP Task #2	19 PREP: Dan’s IEP Task #3	20 PREP: Dan’s IEP Task #4	21
22	23 PREP: Dan’s IEP Task #5	24 PREP: Dan’s IEP Task #6	25 PREP: Dan’s IEP Task #7	26 PREP: Prepare for Erica’s IEP Meeting (Print)	27 PREP: Erica’s IEP Meeting	28
29	30 NO SCHOOL- Spring Break	31 NO SCHOOL- Spring Break				

Figure 2

Prioritizing Daily or Unexpected Tasks: Pre-Service SET Example

Prioritizing Case Manager Tasks

Good morning! It is the start of your work day! You enter your classroom and sit down to figure out how you will organize your day. You open your computer and read through the emails you have received since yesterday. You also have a couple of items on your desk that need to be completed. The table below includes five of these tasks. For each task, identify the priority to which you would respond to it, how you would respond, when you would respond (use your daily schedule), and any other considerations in order to accomplish all five tasks today. You can do this!

Tasks	# of Priority 1-5 & Why	How Will You Respond	When Will You Respond/Do the Task	Any Other Considerations
A student on your caseload has a science test to take during 3rd period and is scheduled to take it in the school's testing room for full read-aloud. You receive an email that the person who works in the testing room is absent today, and it will be closed.	Priority #2: This is a problem because the child needs to take the science test today in another room since the testing room is closed. This is a required accommodation in their IEP.	I will see if another faculty or staff member can cover my 3rd period recess duty so I can have the student come to my classroom or office and provide read read-aloud for the science test.	I will call my colleagues in the morning, before advisory, to find coverage for my 3rd-period recess duty. I will email the science teacher to let them know the location change. I will let the student know about the change during advisory.	If someone else can provide read aloud (possibly a paraprofessional) Don't want to reschedule or postpone the student taking the test, as it could cause them to miss course instruction.
You have two behavior checklists to fill out (for students you work with) that are due tomorrow for another case manager. They should each take about 15 minutes to complete.	Priority #4: They are due tomorrow, so I have time today or worst case, tomorrow to get them done if needed.	I will complete both checklists when I have free time today. I will place them in their case manager's mailbox tomorrow.	I will complete one during my lunch period. I will complete the second one after bus duty and before I'm allowed to leave for the school day.	I could possibly do them tomorrow morning, but not sure what new unexpected tasks could happen.

did were enough.” However, 22% (n=6) did provide recommendations for additional practice. One pre-service SET requested more practice writing and organizing due dates for RRs and IEPs for different students on a caseload. Two students noted additional practice with progress monitoring as “collecting data for IEP goals” and more specifically “more in-depth how to translate data out of jargon into parent-friendly vernacular.” This supported the quantitative finding of collecting data for parent updates displaying the least difference in preparedness from pre-test to post-test results (Table 2). One student requested more practice with formal communication, specifically with meetings or interviews. One student requested more templates that they could save and use for the future, and one student noted they wished there was a field component so they could “see the activities we do being put in place.”

Discussion

The embedded case management activities (e.g., paperwork, data collection, parent communication, IEP team collaboration, meetings, unexpected events, and prioritizing time) resulted in significant increases in the pre-service SETs levels of preparedness when comparing pre-test to post-test results (Table 2). However, some activities or skills had a greater effect on the pre-service SETs than others. Paperwork is identified as the top stressor in special education attrition research (Billingsley & Bettini, 2019; Caballero, 2024; Hagaman & Casey, 2018) and was also identified as the main or only responsibility among pre-service SETs when describing case management responsibilities, identifying that undergraduate students know and understand it is an important and challenging aspect of the career they are entering.

The quantitative and qualitative data show that pre-service SETs benefited the most from activities not

solely on how to write special education documents, but how to manage and organize their time to ensure they are collecting data and completing the required documents by their legal due dates. As part of the paperwork and data collection activities, pre-service SETs made their own calendar (Figure 1) to record caseload due dates and utilize backward planning to maximize their prep periods for data collection and sending out communication updates (e.g., emails). These two skills were ranked as pre-service SETs demonstrating the most significant progress from pre-test to post-test results (Table 2), as well as the most mentioned when asked which assignment was most beneficial in the qualitative post-test item.

Additionally, pre-service SETs exhibited great growth in their perceived level of preparedness when it comes to prioritizing the daily tasks or handling unexpected situations as a case manager (Table 2). This was also identified as a new theme in the post-test qualitative responses, with seven comments specific to it compared to no mentions of it in pre-test responses. This data shows how pre-service SETs have a lack of awareness or difficulty understanding the on-the-spot challenges that arise during the school day when a student on a caseload can be having academic, emotional, or behavioral difficulties. Pre-service SETs had the opportunity to practice prioritizing daily tasks outside of their typical responsibilities, thinking about their available time during the school day or week (Figure 2), and engaged in in-person “events” where they were posed with a realistic scenario and given two minutes to respond. These results support Da Fonte and Barton-Arwood (2017) recommendation for teaching activities that help pre-service SETs practice time management skills.

As suggested by previous researchers (e.g., Strassfeld, 2019), the activities that required pre-service SETs to practice sending emails, responding to phone calls, or responding in face-to-face meetings with the opportunity for class discussion and reflection were effective in teaching communication strategies. Pre-service SETs displayed significant growth in their perceived level of preparedness when it comes to responding to parent concerns face-to-face and electronically, as well as documenting all forms of parent communication. However, despite still being significant, pre-service SETs displayed the least amount of growth in initiating contact

with fellow teachers or staff members to discuss student concerns (Table 2). As two pre-service SETs noted in qualitative items, additional activities, such as practicing formal communication techniques and turning special education-specific vocabulary or acronyms into user-friendly terms, would have been beneficial.

Limitations

Although the findings of this pilot study are promising, several limitations should be noted. The study involved a small sample from a single university, limiting generalizability. Future research should examine case management skill development with larger, more diverse samples and across varied instructional contexts (e.g., online or seminar-based courses). While embedding activities in two courses increased participation, the sample remained small, and incomplete post-test responses resulted in unequal pre- and post-test data. Randomly removing pre-test responses to create matched samples led to data loss but was necessary for analysis. Additionally, responses from both courses were analyzed collectively, though separating them may have revealed differences related to program structure (standalone vs. double majors) or instructional approach, as the courses were taught by different instructors. The study also relied on self-reported data, increasing the potential for bias. Finally, the use of open-ended survey questions produced varied responses; future studies could benefit from more in-depth qualitative methods, such as interviews or focus groups, to better understand specific case management skills requiring additional practice.

Implications for Future Research and Teacher Preparation Programs

The severe shortage and turnover of special education teachers has increased the need for condensed and alternative certification pathways, limiting the ability to add required coursework. Instead, teacher preparation programs must strengthen existing courses and pedagogy to better prepare pre-service SETs for the complex responsibilities of case management. Findings from this pilot study ($n = 27$) suggest that effective preparation requires not only teaching case management tasks, but also providing opportunities to practice how those skills are applied. Although the two courses addressed case management components in isolation,

embedding applied activities allowed pre-service SETs to practice skills in realistic contexts and connect learning across courses.

Teacher preparation programs and future research should further replicate the day-to-day experiences of special education teachers, particularly by standardizing instruction that builds communication skills with parents and colleagues. Communication related to student concerns showed the lowest perceived growth in preparedness, highlighting the need for targeted practice. Research consistently emphasizes the importance of focused training in parent collaboration and interpersonal skills (Kyzar et al., 2019; Luke & Vaughn, 2022), as communication is a strong predictor of parent involvement and positive student outcomes (Gise-white et al., 2021; Berkowitz et al., 2021).

Finally, longitudinal studies are needed to examine the sustained impact of case management instruction during student teaching and the early years of employment (i.e., years one through three and beyond the third year of teaching), including comparisons between condensed and full-semester models. Future research should also examine burnout and stress among novice teachers, as these findings may inform certification competencies, policy decisions, and efforts to reduce attrition in special education.

Conclusion

Increasing special education teacher retention requires changes to be made by various stakeholders, including how teacher preparation programs prepare pre-service SETs for their soon-to-be careers. If certified special education teachers are identifying the multitasking and complex responsibilities of case management as the main contributors to attrition, practicing these skills needs to be the focus in courses. All of the pre-service SETs in this pilot study reported significantly higher levels of preparedness in all areas of case management skills (e.g., paperwork, data collection, parent communication, IEP team collaboration, meetings, unexpected events, and prioritizing time) by the researcher's intentionally integrating specific activities to apply and connect course content. Additionally, most pre-service SETs felt the mix of activities and skills practiced was sufficient in preparing them to be a case manager and have a better understanding of what it

takes to be successful at it. Integrating hands-on case management activities within teacher preparation courses could serve as an intervention to increase the mastery experiences, self-efficacy, and preparedness of the next generation of special education teachers. This preparedness and greater feelings of self-efficacy could reduce levels of stress and exhaustion experienced by SETs, decreasing burnout.

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