EDUCATOR SHORTAGES IN SPECIAL EDUCATION

Toolkit for Developing Local Strategies

FACILITATOR'S GUIDE

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CEEDAR CENTER

IDEAs that Work
U.S. Office of Special Education Programs

Facilitator's Guide

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About the Guide

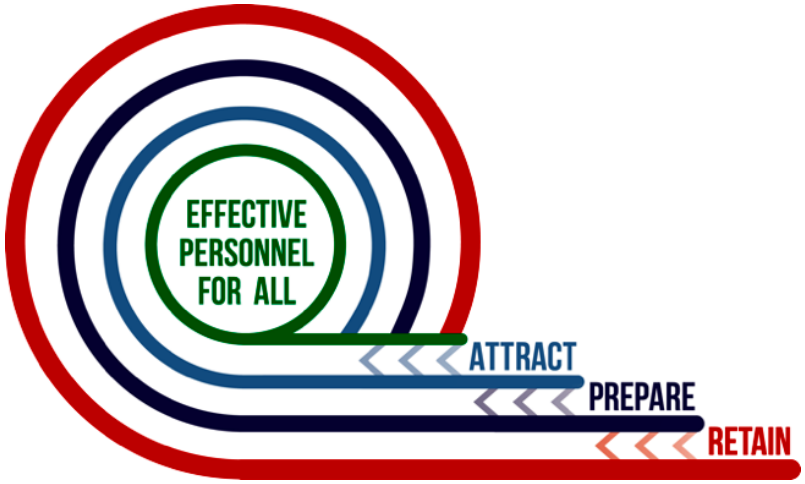
What Is the Facilitator's Guide?

This guide helps teams identify and implement a combination of short- and long-term educator talent management strategies to create comprehensive special education teacher shortage solutions that address local context and needs.

Purpose

The Facilitator's Guide to *Educator Shortages in Special Education: Toolkit for Developing Local Strategies,* developed by the Center on Great Teachers and Leaders (GTL Center) and the Collaboration for Effective Educator Development, Accountability, and Reform (CEEDAR) Center, is designed to lead state teams through a collaborative process in developing a comprehensive approach for addressing special education teacher shortages through a combination of short- and long-term educator talent management strategies. Aligned with current efforts from the U.S. Department of Education's Office of Special Education Programs (OSEP), this process intentionally examines shortages across the entire career continuum—from attracting to preparing to retaining teachers—so that all students with disabilities (SWDs) have access to effective teachers (Figure 1).

Figure 1. OSEP's Focus Across the Career Continuum



Audience

This guide is written for the leaders and facilitators of state teams charged with developing a comprehensive approach for addressing local special education teacher shortages. State teams should promote shared ownership, collective action, and joint accountability across the following partners:

- **State education agency** (SEA) personnel responsible for statewide educator talent management systems, data and monitoring systems, and educator preparation and accountability systems
- **Regional education agency** personnel responsible for building capacity across districts and regions within states
- **Local education agency** (LEA) or district personnel responsible for attracting, developing, and retaining effective special education teachers, including instructional leaders and human resources personnel
- **Educator preparation program** (EPP) personnel, including both traditional and alternative routes, responsible for preparing new special education teachers

How to Use the Guide

Technical Assistance Approach

The Facilitator's Guide leads teams through a three-phase process to identify short- and long-term strategies that, when implemented concurrently, can lead to comprehensive special education teacher shortage solutions (Figure 2). In the first phase, teams **assess** their shortage needs to **plan and prepare** for implementation of both short- and long-term evidence-based educator talent management strategies. In the next phase, teams define partner roles and responsibilities to **implement, monitor, and improve** these strategies. In the final phase, teams consider ways to **sustain and scale up** these strategies to other schools, districts, and regions within the state.

Figure 2. Three-Phase Process

The Facilitator's Guide is organized around the guiding principle that comprehensive shortage solutions require short-term strategies to address the immediate demand for special education teachers coupled with long-term, systemic strategies to strengthen the educator workforce. For this reason, during *Phase I: Assess, Plan, and Prepare* teams concurrently identify short-term strategies to fill vacancies while engaging in a data-driven process to examine and address the systemic root causes of shortages. Table 1 shows how the Facilitator's Guide leads teams through concurrent processes to examine complementary short-term and long-term strategies that can be jointly implemented, sustained, and scaled.

Table 1. Stages Within the Three-Phase Process

<table>
<tr><th colspan="2">Phase I: Assess, Plan, and Prepare</th></tr>
<tr><td>Short-Term Strategies
Stage 1: Hire Candidates With the Most Potential
Stage 2: Provide New Hires With Intensive Professional Learning</td><td>Long-Term Strategies
Stage 1: Explore Context
Stage 2: Analyze Data
Stage 3: Identify Root Causes
Stage 4: Select Strategies</td></tr>
<tr><th colspan="2">Phase II: Implement, Monitor, and Improve</th></tr>
<tr><th colspan="2">Phase III: Sustain and Scale Up</th></tr>
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Guide Structure

The Facilitator's Guide leads teams through a multi-stage process to consider both short and long-term strategies that contribute to a comprehensive approach to addressing special education teacher shortages. Each stage is anchored by an **essential question** and **big ideas** to help teams frame their thinking about special education teacher shortages. Each stage is further divided into suggested **action steps** accompanied by **recommended tools and resources** and **reflection questions for state teams**. The recommended tools and resources provide state team leads and facilitators with in-depth facilitation guidance, implementation resources, and continuous improvement tools to help state teams carry out the suggested action steps.

Teams may need additional support from an experienced technical assistance facilitator to carry out the activities in this guide. States interested in support related to this guide should contact the CEEDAR Center.

Introduction

The Challenge

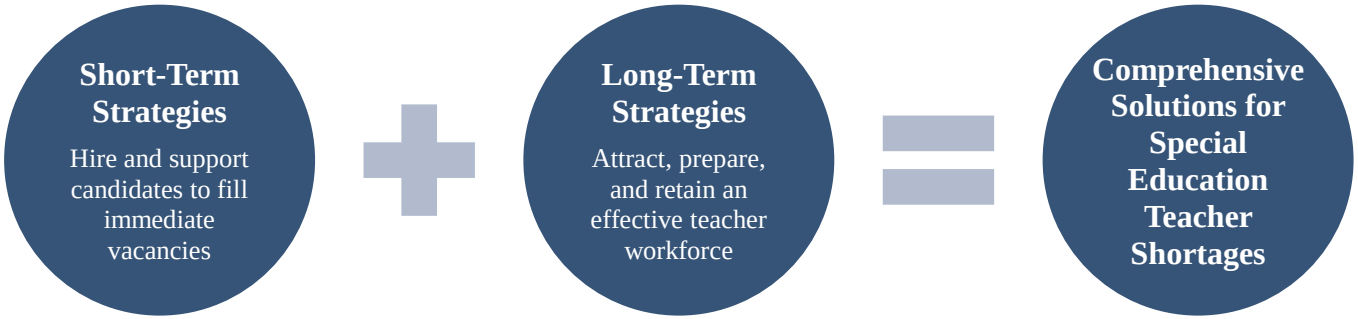
Special education teacher shortages have existed for decades. In this time, states and districts have cycled through many different strategies that were intended to mitigate shortages. Some states have tried financial incentives for hard-to-staff positions, such as hiring bonuses or loan forgiveness agreements. Other states have developed "grow-your-own" programs to expand pathways into the profession or invested in mentoring and induction to improve teacher retention. Still other states have tried increasing EPP accountability, in the hope that graduates will be better prepared and therefore more likely to remain in the profession. However, states and districts facing shortages of crisis proportions often are left with few options but to lessen the requirements for certification and licensure to increase the pool of available teachers. Many districts are increasingly turning to alternative certification routes to fill vacancies but then experience a "revolving door" when inexperienced and underprepared teachers leave after a few years in the classroom.

Special Education Teacher Certification and the Every Student Succeeds Act (ESSA)

ESSA allows states more flexibility and control over teacher licensure requirements. However, ESSA defers to the Individuals with Disabilities Education Act (IDEA) for the licensure requirements of special education teachers. Although ESSA affords states the flexibility to waive licensure requirements for most teachers, they cannot be waived for special education teachers because IDEA requires that special education teachers be fully licensed when they begin to teach. The only option for an unlicensed beginning special education teacher is to be enrolled in an alternate certification program that requires high-quality professional development and intensive supervision, leads to full certification, and does not last more than 3 years.

This Facilitator's Guide is based on the guiding principle that short-term strategies to meet immediate demand must be intentionally paired with long-term, systemic strategies to attract, prepare, and retain effective special education teachers to create comprehensive shortage solutions (Figure 3).

Figure 3. Comprehensive Shortage Solutions



Unfortunately, the urgent need for short-term solutions to fill vacancies, particularly in critical shortage areas such as special education, often works in opposition to long-term, systemic efforts to create an effective teacher workforce. Systemic efforts to strengthen educator talent management systems may produce better prepared teachers who are more likely to be retained, but these strategies take time to implement. In addition to the short-term, stopgap solutions that are sometimes necessary to address immediate vacancies, states also must invest in long-term, systemic strategies to address the root causes of special education teacher shortages. Systemic strategies to strengthen educator talent management systems require strong partnerships at all stages of the career continuum, which involves the full commitment and shared ownership of the SEA, local districts, and EPPs.

Guiding Principles

To reinforce the importance of systemic strategies to address the complex problem of shortages, guidance in the Facilitator's Guide is based on the following principles:

- **Shortages are a local issue.** Although national and state-level shortage data provide valuable information, the data often obscure patterns in shortages at the district and school levels that directly affect students' access to effective teachers. Addressing special education teacher shortages requires strategies that directly respond to local needs and context.
- **Shortages are an equity issue.** Shortages do not impact all localities and populations of students in the same way. A focus on improving shortages in the aggregate often overlooks the populations of students who are most in need of effective instruction. Improving equitable access to effective special education teachers means addressing teacher shortages at the local level for the highest need populations of students.

- **Shortages can impact any stage of the career continuum.** For example, shortages can result from attracting or preparing too few teachers. Shortages also can result from high rates of teacher attrition. Understanding the points on the career continuum at which shortages develop, expand, or contract is essential for selecting strategies that will address the root causes of shortages.
- **Shortages require collaboration across partners at all stages of the career continuum.** Because shortages can occur at any point of the career continuum, multiple partners play a role in contributing to solutions, including SEAs, local districts or LEAs, and EPPs. Addressing shortages requires strong networks with shared ownership, collective action, and joint accountability between the state and local levels. Partners need clearly defined roles and responsibilities to work together to address shortages.

Phase I: Assess, Plan, and Prepare

Short-Term Shortage Strategies

Hire and Support Candidates to Fill Immediate Vacancies

Overview

When vacancies need to be filled immediately and no experienced special education teachers are available, schools and districts are often left with no choice but to hire candidates who have limited or no preparation in teaching SWDs. In these situations, school and district leaders must be equipped to make informed choices about **hiring candidates who demonstrate the most potential** for success as special education teachers. New hires with limited preparation will require **intensive, ongoing professional learning supports** grounded in high-leverage and evidence-based practices to become effective special education teachers (see Figure 4).

Figure 4. Stages to Assess, Plan, and Prepare for Short-Term Shortage Strategies

Objectives

This section of the Facilitator's Guide will support teams to:

- Make informed decisions about hiring the best possible candidates for immediate special education vacancies; and
- Create a comprehensive system of professional learning supports for beginning special education teachers that increases their knowledge and use of high-leverage and evidence-based practices.

Featured Resource

- Special Education Teacher Shortages Primer

Stage 1: Hire Candidates With the Most Potential

Essential Question

- How can schools and districts make informed hiring decisions for special education vacancies?

Big Ideas

- The special education teacher shortage crisis has made hiring a challenge for many districts and schools.
- Districts and schools faced with immediate special education vacancies often are left with no choice but to hire candidates who have been certified through a route that required little or no preparation in teaching SWDs.
- In these situations, district and school leaders and hiring managers can look at certain characteristics and experiences for help in deciding whether a candidate may be suited to the role of a special education teacher.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Assess candidates' prior knowledge and experiences.	**Brief** Short-Term Strategies for Dealing With Shortages of Special Education Teachers GTL Center/CEEDAR Center **Module** Teacher Induction: Providing Comprehensive Training for New Special Educators—Good Job Match IRIS Center **Brief** Ensuring High-Quality Teacher Talent Education First	▪ Who should be included in conversations about hiring and supporting new teachers? • Superintendents • Principals • Human resources directors • Special education administrators • Current experienced special education teachers • Current beginning special education teachers • Mentor teachers • Others? ▪ In our context, what criteria are the most reliable indicators of a candidate's potential as a special education teacher? ▪ What experiences might be an indicator of potential—for example, prior experience as a paraprofessional? Experience with individuals with disabilities? Experience in schools? ▪ What dispositions and competencies might be an indicator of potential—for example, the ability to be coached? The ability to remain calm under pressure? Initiative? Persistence? Belief in learning potential for all students? ▪ What knowledge might be an indicator of potential—for example, knowledge of IDEA? Knowledge of the local community? ▪ How will we support school and district leaders to embed desired experiences, dispositions, competencies, and knowledge in job descriptions and postings to attract the best candidates? ▪ How will we support school and district leaders to design interview processes to help them identify these desired indicators in candidates—for example, training selection and hiring teams?
Consider candidates' certification route and preparation experiences.	**Brief** Short-Term Strategies for Dealing With Shortages of Special Education Teachers GTL Center/CEEDAR Center	▪ Is there a pool of dually certified teachers not currently serving as special education teachers that we can target for recruitment? ▪ Did the candidate's certification route include any practice-based opportunities (e.g., clinical experience, internship, or student teaching)? ▪ Does the candidate's certification route provide any current in-service supports (e.g., external coach, mentor)?

Stage 2: Provide New Hires With Intensive Professional Learning Supports

Essential Question

- How can we provide beginning special education teachers with comprehensive professional learning supports?

Big Ideas

- Hiring individuals who lack sufficient preparation in teaching SWDs come with a unique set of challenges.
- Special education teachers prepared through fast-track or alternative routes often require more time and resources than teachers who have been traditionally prepared because there may be critical gaps in their knowledge and skills.
- Some gaps can be addressed through intensive, sustained, in-service professional learning supports.
- Districts and schools should consider both the structure and content of intensive professional learning experiences for novice special education teachers.
- The structure of the professional learning experiences should provide ongoing opportunities for both individual support (such as mentoring and instructional coaching) and peer-to-peer support (e.g., professional learning communities, ongoing professional development).
- The content of the professional learning experiences should be grounded in high-leverage and evidence-based practices for SWDs.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Create consistent messages for instructional expectations.	**Website** High-Leverage Practices in Special Education CEC/CEEDAR Center **Guide** High-Leverage Practices in Special Education: A Professional Development Guide for School Leaders CEC/CEEDAR Center **Interactive Alignment Tool** High-Leverage Practice Resources Interactive Alignment Tool IRIS Center/CEEDAR Center	▪ What are the high-leverage and evidence-based practices that we want all special education teachers to know and be able to do with their students? ▪ Are these practices embedded in the observation instrument used to evaluate special education teachers? ▪ What are the most essential knowledge and skills that new hires with limited or no preparation teaching SWDs need to be effective in the classroom? ▪ How will we ensure consistent messaging about expectations for instructional practice across beginning teachers' professional learning experiences? ▪ What is the role of the EPPs in working with districts to establish consistent messaging for instructional expectations? ▪ How will we prioritize which knowledge and skills to target throughout the first and second years of teaching? ▪ How will we assess gaps in new hires' knowledge and skills to know how to target supports? ▪ How will we establish expectations for learning and growth in the first and second years of teaching in alignment with our teaching standards?
Deliver intensive professional learning supports anchored in high-leverage and evidence-based practices.	**Module** Beginning Teacher Professional Learning & Development GTL Center **Module** Mentoring & Induction for Educators of Students With Disabilities GTL Center **Brief** How Administrators Can Help Novice Special Education Teachers Thrive: Induction Practices That Make a Difference NCIPP **Handbook** Mentor Handbook: Supporting Beginning Special Educators NCIPP **Manual** District Induction Manual: Supporting Beginning Special Educators NCIPP	▪ How will we leverage multiple professional learning structures (e.g., orientation, professional learning communities, ongoing professional development, mentoring, coaching) to create a comprehensive system of support for new teachers? ▪ How will we identify mentor teachers and coaches who are knowledgeable of high-leverage and evidence-based practices and well-versed in their use? ▪ How will we match beginning teachers with experienced mentors and coaches? ▪ How will we ensure that all professional learning experiences are anchored in high-leverage and evidence-based practices for special education? ▪ How will we fund these professional learning opportunities?

CEC = Council for Exceptional Children; NCIPP = National Center to Inform Policy and Practice in Special Education Professional Development

Long-Term Shortage Strategies

Attract, Prepare, and Retain an Effective Teacher Workforce

Overview

The Facilitator's Guide is based on an approach that is designed to help teams identify long-term strategies specific to local contexts and needs. To identify long-term strategies, teams **explore context** for national, state, and local special education teacher shortages; **analyze data** across state, regional, local, and EPP partners; **identify root causes** of local shortages; and **select strategies** to strengthen educator talent management systems (see Figure 5).

Figure 5. Stages to Assess, Plan, and Prepare for Long-Term Shortage Strategies

Objectives

This section of the Facilitator's Guide will support teams to:

- Establish a collaborative partnership between the SEA, local districts, and EPPs to examine shortages;
- Analyze data at the state, regional, district, and EPP levels to determine the root causes of shortages; and
- Identify and select educator talent management strategies that address the root causes underlying shortages.

Featured Resources

- Learning Policy Institute (LPI): Teacher Shortages Solutions Toolkit
- Analyzing Special Education Teacher Shortages: A Data Tool for Practitioners
- Shortage Strategy Selection Tool

Stage 1: Explore Context

Essential Question

- Why do special education teacher shortages matter in our state's context?

Big Ideas

- Teacher shortages are a growing concern as the teacher workforce changes.
- National and state-level data show long-standing shortages in several critical areas, including special education.
- Further examination of teacher shortage trends at the district and school levels reveals that teacher shortages vary greatly by geographic area, subject, grade level, and school and student characteristics, such as the percentage of students living in poverty.
- Research shows that special education teachers who have gone through a full preparation program have a positive impact on student learning. However, shortages in special education mean that many SWDs do not have access to a fully prepared teacher who is equipped to positively impact student learning.
- Improving equitable access to effective special education teachers means addressing teacher shortages at the local level for the highest need populations of students.
- To address special education teacher shortages, states must facilitate strong networks with shared ownership, collective action, and joint accountability between all partners including the SEA, LEAs, and EPPs.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Establish a team consisting of SEA, district, EPP, and other key stakeholder group representatives.	**Facilitation Guide** Moving Toward Equity: Stakeholder Engagement Guide ▪ Step 1.1—Building an Internal SEA Team ▪ Step 1.2—Creating a Big-Picture Vision ▪ Step 1.3—Identifying Stakeholder Groups ▪ Step 1.4—Envisioning the Mechanisms for Engaging Stakeholders ▪ Step 1.5—Envisioning How Best to Prepare Stakeholders for Engagement ▪ Step 1.6—Envisioning a Long-Term Educator Equity Coalition ▪ Step 1.7—Planning for Stakeholder Engagement: A Suggested Approach GTL Center	▪ Who are the key stakeholder groups affected by special education teacher shortages in our state? ▪ Does the team include adequate representation from a range of SEA stakeholders across applicable offices and divisions? • Special education • Educator talent • Data systems ▪ Is there adequate representation from the LEAs in our state that are most impacted by shortages (e.g., urban, rural)? ▪ Does the team include adequate representation from a range of LEA and school-level stakeholder roles? • Superintendents • Principals • Human resources directors • Special education administrators • Special education teachers with a variety of roles (e.g., inclusion, self-contained) and years of experience • Unions ▪ Which EPPs should be represented on the team? Does this include both traditional and alternative route EPPs? ▪ Are the largest producers of special education teachers in the state included on the team? ▪ Does the team include adequate representation from a range of EPP stakeholder roles? • Traditional preparation program faculty • Alternative route preparation program faculty • Deans and program chairs ▪ What other organizations or special interest groups should be represented on the team? • Parent groups • Professional organizations (e.g., CEC, CASE) • Unions • Others?

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Inventory past and current initiatives to address teacher shortages.	**Tool** National Implementation Research Network Initiative Inventory NIRN/SISEP	▪ Are existing task forces or workgroups charged with examining teacher shortages in the state? ▪ What key recommendations, action steps, and outcomes have emerged from current or past task forces or workgroups? ▪ What lessons learned from current or past task forces or workgroups should we consider duplicating or avoiding? ▪ Should we consider collaborating, consulting, or consolidating our work with an existing workgroup? ▪ What current state- and/or district-level strategic plans are in place to address teacher shortages? How will our efforts align and support these plans? ▪ What initiatives/plans currently exist among our state, local, and EPP partners to address teacher shortages? How can our team connect to and leverage these existing initiatives/plans?
Explore the national context for special education teacher shortages to understand how our state compares with others.	**Website** Resources: Teacher Shortages in the United States LPI **Toolkit** Teacher Shortage Solution Toolkit LPI **Interactive Map** Understanding Teacher Shortages: 2018 Update: A State-by-State Analysis of the Factors Influencing Teacher Supply, Demand, and Equity LPI **Interactive Calculator** What's the Cost of Teacher Turnover? LPI **Brief and Report** Teacher Turnover: Why It Matters and What We Can Do About It LPI **Brief and Report** A Coming Crisis in Teaching? Teacher Supply, Demand, and Shortages in the U.S. LPI	▪ How do our state's special education teacher shortage trends compare with national trends? ▪ Which states are facing similar challenges related to special education teacher shortages? ▪ What are we currently spending on hiring new teachers that do not remain in the field?

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Consider how special education teacher shortages reflect issues of equitable access.	**State Equity Plans** State Plans to Ensure Equitable Access to Excellent Educators U.S. Department of Education **Brief** Teacher Shortages: Top 10 Ideas From the First State ESSA Plans AIR	▪ Which student groups in our local communities' lack equitable access to effective teachers? ▪ How are we using educator talent management systems to address issues of equitable access to effective teachers in our local communities? ▪ What information does our state equity or Every Student Succeeds Act (ESSA) plan provide about teacher shortages and equitable access?
Create talking points to articulate why action is needed to address local special education teacher shortages.	**Brief** Preparing and Retaining Effective Special Education Teachers: Short-Term Strategies for Long-Term Solutions GTL Center/CEEDAR Center **Toolkit** Talking About the Teacher Shortage LPI	▪ Why does addressing special education teacher shortages matter to our state and local communities? ▪ What challenges have our state and local communities faced related to teacher shortages? What data are available to illustrate these challenges? ▪ Why is action needed now?

CASE = Council of Administrators of Special Education; NIRN = National Implementation Research Network; SISEP = State Implementation and Scaling-Up of Evidence-Based Practices.

Stage 2: Analyze Data

Essential Question

- What resources are available to help us understand special education teacher shortages?

Big Ideas

- Teacher shortages are first and foremost a local issue.
- National and state-level data may mask underlying trends in shortages at the local level.
- Analyzing disaggregated special education teacher shortage data at the district and/or school levels can help teams determine the principal factors that influence local shortages.
- Teacher shortages can occur at any stage of the career continuum, including attracting, preparing, or retaining teachers. Therefore, multiple partners play a role in addressing special education teacher shortages, including SEAs, local districts, and EPPs. Each partner will have access to different data sources that can help inform the team's decisions.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Use the *Analyzing Special Education Teacher Shortages: A Data Tool for Practitioners* to start a conversation across partners about the points along the career continuum where shortages are developing.	**Data Tool** Analyzing Special Education Teacher Shortages: A Data Tool for Practitioners GTL Center	▪ What is the scope of special education teacher shortages in our state? ▪ What regions, LEAs, and student populations are most affected by teacher shortages in our state? ▪ At what stages along the career continuum are special education teacher shortages developing or expanding? ▪ Are there any specific points on the career continuum at which a significant or sudden expansion in the gap between the retention of special education teachers and general education teachers is occurring (e.g., 1, 3, or 5 years)? ▪ Which partners (state, district, EPP) are involved at the points where the shortages are developing or expanding? ▪ How do special education teacher shortages differ between high-performing and low-performing schools for SWDs?
Identify and examine additional sources of data at the state, regional, district, and EPP levels.	**Facilitation Guide** Moving Toward Equity: Data Review Tool ▪ Step 1.1—Identify Equitable Access Metrics ▪ Example and Priority Metrics Worksheet GTL Center	▪ What additional sources of data should be examined at the state level? • Teacher mobility • Certification and licensure • Workforce diversity ▪ What additional sources of data should be examined at the district level? • Hiring and placement • Teacher retention • Teacher exit surveys • "Stay interviews" (e.g., identification of the factors that retain teachers) • Numbers of students in IDEA disability categories • Least Restrictive Environment (LRE) placement • Numbers of types of special education teachers (e.g., inclusion, resource, self-contained) ▪ What additional sources of data should be examined by EPPs? • Program completer • Hiring and placement ▪ What additional data sources related to alternative certification programs are needed? ▪ What additional data sources can state team members bring to the table?

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Reflect on data analysis findings across partners to identify key trends for attracting, preparing, and retaining teachers.	**Facilitation Guide** Moving Toward Equity: Data Review Tool ▪ Step 2.1—Examine Available Data ▪ Step 2.2—Connect Quantitative Data to Practical Solutions GTL Center **Data Tool** Insights on Diversifying the Educator Workforce: A Data Tool for Practitioners GTL Center	▪ What trends do we observe in attracting teachers into EPPs and district hiring pipelines? ▪ What trends do we observe in preparing teachers as they progress through traditional and alternative preparation routes? ▪ What trends do we observe in retaining teachers at the district and school levels? ▪ Do the data suggest a consequential impact on student learning (e.g., students of color in high-poverty schools are being served by the least experienced teachers)? ▪ Is there a connection between special education teacher shortages and the diversity of the educator workforce? ▪ What additional factors influence SWDs' access to effective educators?

Stage 3: Identify Root Causes

Essential Question

- How do we know where to focus our efforts to address special education teacher shortages?

Big Ideas

- Identifying the root causes of special education teacher shortages can help teams identify strategies that address inequitable access at the local level for the highest need populations of students.
- Qualitative data are just as important as quantitative data when determining the root causes of teacher shortage trends.
- Because of their unique roles and responsibilities, the root causes of special education teacher shortages may differ from the root causes of other types of teacher shortages.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Dig deeper into the "why" behind trends observed in shortage data to identify root causes of teacher shortages at the state level.	**Facilitation Guide** Moving Toward Equity: Root-Cause Analysis Workbook ▪ Step 1—Specify the Challenges to Be Addressed ▪ Step 2—Identify Root Causes GTL Center	▪ Has root-cause analysis of shortages already been conducted through a state plan (e.g., equity plan, ESSA plan)? What were the findings? How do these findings compare with the root causes identified through this process? ▪ What sources of qualitative data can help us explain the trends we see in quantitative shortage—for example, teacher interviews, surveys, or working conditions data? ▪ Why are shortages expanding at particular points of the career continuum? Why are we struggling to attract, prepare, or retain teachers? ▪ Why are shortages expanding in certain geographic areas? ▪ Why are shortages expanding in certain schools?
Drill down into the root causes of teacher shortages at the regional, district, and EPP levels.	**Facilitation Guide** Moving Toward Equity: Root-Cause Analysis Workbook ▪ Step 1—Specify the Challenges to Be Addressed ▪ Step 2—Identify Root Causes GTL Center	▪ What sources of data, both qualitative and quantitative, support our team's conclusions about the root causes of shortages at the local level (e.g., regions, districts, EPPs)? ▪ What data are missing that could help us better understand root causes at the local level?
Share root-cause findings across partners.	**Facilitation Guide** Moving Toward Equity: Root-Cause Analysis Workbook ▪ Step 3—Categorize the Causes ▪ Step 4—Visualize Your Causes and Categories GTL Center	▪ How are the root causes of local shortages similar to or different from the root causes of state-level shortages? ▪ What systemic challenges at the state and local levels do these root causes speak to?

Stage 4: Select Strategies

Essential Question

- Which strategies address the root causes of our special education teacher shortage?

Big Ideas

- Comprehensive solutions to address special education teacher shortages require a combination of short- and long-term strategies.
- To address immediate vacancies, schools and districts often resort to filling special education positions with teachers who lack sufficient preparation to be successful. Districts must concurrently provide short-term, intensive support to these educators to get them prepared, while laying the foundation for long-term solutions.
- Long-term solutions to special education teacher shortages require a systemic approach that is specific to the local context without compromising quality.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Use the *Shortage Strategy Selection Tool* to identify potential strategies that target the root causes of shortages at specific points along the career continuum.	**Selection Tool** Shortage Strategy Selection Tool GTL Center	▪ How will our selected strategies address the root causes of local shortages? ▪ How do our selected strategies fit within the context of a systemic approach to educator talent management? ▪ What knowledge, skills, and dispositions are critical for our special education teacher workforce? How will our selected strategies contribute to building a workforce with the necessary knowledge, skills, and dispositions? ▪ What existing educator talent management initiatives related to attracting, preparing, and retaining teachers can be leveraged to address the root causes of local shortages?
Prioritize strategies based on local needs.	**Facilitation Guide** Moving Toward Equity: Setting Priorities GTL Center	▪ What is the evidence base for the potential strategies? Does the evidence base align to the local context? ▪ Should multiple strategies be selected or offered based on local contexts and needs? What are advantages to offering multiple strategies for local implementation instead of promoting one statewide approach? ▪ How might the SEA offer a range of options to support regional, district, and EPP implementation of strategies grounded in local context? ▪ How do the prioritized strategies promote equitable access for SWDs and other vulnerable populations?
Use the *Shortage Strategy Partner Role Guide* to define partner roles and responsibilities for implementing the selected strategies.	**Guide** Shortage Strategy Partner Role Guide GTL Center	▪ What partners are directly involved in the implementation of our selected strategies (e.g., SEA, districts, schools, EPPs)? ▪ What are the primary roles and responsibilities for each partner in the implementation of the selected strategies? ▪ What other partners or stakeholders should be consulted to give feedback on the implementation of our strategies?
Create a plan for implementing the selected strategies.	**Interactive Tool** Moving Toward Equity: Taking Action GTL Center	▪ What is the best way to articulate plans for implementing the strategies—for example, separate action plans? Embedded within SSIPs, SPDG plans, ESSA plans, school improvement plans? ▪ What are the pros and cons of embedding the implementation plan within an existing state or local strategic plan?

SPDG = State Personnel Development Grant; SSIP = State Systemic Improvement Plan.

Phase II: Implement, Monitor, and Improve

Essential Question

- How do we know if the strategies to address special education teacher shortages are working?

Big Ideas

- Strategies to address special education teacher shortages should improve equitable access to effective special education teachers at the local level for the highest need populations of students. If teacher shortages are lessened for student groups that already have effective teachers, then the goal of improving equitable access for all students has not been accomplished.
- Policy and practice changes may have unintended consequences. Carefully monitoring progress and adjusting shortage strategies as needed can help avoid this challenge.
- Continuous improvement processes are critical to the success of efforts to address shortages. Continue improvement cycles can be applied to individual short- or long-term educator talent management strategies as well as the overall approach to address shortages.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Provide state-level resources and infrastructure to support the local implementation of strategies.	**Interactive Tool** Shortage Strategy Selection Tool ▪ Resources ▪ Exemplars ▪ Funding Sources GTL Center	▪ What resources can the SEA provide to support local implementation of the selected strategies? ▪ What sources of funding can be leveraged to support local implementation of the selected strategies? ▪ How can funding from the SEA blend and braid with other sources of funding within districts and EPPs?
Identify metrics and data collection procedures to monitor progress toward the implementation of strategies.	**Interactive Tool** Moving Toward Equity: Measuring Progress GTL Center	▪ Are data already being collected that we can use to inform our progress? ▪ What data do we need to collect to tell us if our selected strategies are working? ▪ What is a realistic time period to realize success?
Assess effectiveness of current strategies to address shortages and adjust as needed.	**Interactive Tool** Moving Toward Equity: Adjusting Strategies GTL Center	▪ Have our selected strategies addressed the root causes of shortages? ▪ Are the strategies we selected to address shortages working? How do we know? ▪ Are we seeing improvements in teacher shortages in the schools that need it the most? ▪ What have been the intended or unintended consequences of policy and practice changes? How will these consequences affect ongoing implementation?
Communicate progress with key stakeholder groups affected by shortages.	**Interactive Tool** Moving Toward Equity: Raising Awareness GTL Center	▪ How will we communicate our effects to key stakeholder groups? ▪ How will we ensure consistent messaging across stakeholder groups? ▪ How will we capture successes and lessons learned?

Phase III: Sustain and Scale Up

Essential Question

- How do we ensure that our efforts to address shortages are sustained and scaled across the state?

Big Ideas

- Many educator talent management strategies fail to produce results because they are not sufficiently integrated into the strategic priorities and everyday work of key stakeholders such as a districts, schools, and EPPs.
- Embedding educator talent management strategies to address shortages within existing strategic plans can increase the likelihood that the strategies reach full implementation, thereby improving the long-term sustainability of efforts to address shortages.
- Lack of funding is a frequent barrier to long-term sustainability of efforts to address shortages. Partners should proactively address this barrier by considering how multiple funding streams can be used to support the work.
- Sustaining and scaling strategies to address shortages requires strong partnerships with shared ownership, collective action, and joint accountability across all stakeholders.

Suggested action steps	Recommended tools and resources	Reflection questions for state teams
Embed short- and long-term shortage strategies into existing strategic plans.	**Interactive Tool** Moving Toward Equity: Raising Awareness GTL Center	▪ How will embedding short- and long-term shortage strategies within existing strategic plans increase the sustainability of our efforts? ▪ Which strategic plan(s) should reflect our selected short- and long-term shortage strategies—for example, SSIPs, SPDG plans, ESSA plans, SEA strategic plans, district improvement plans, school improvement plans, etc.? ▪ How do our selected short- and long-term shortage strategies support the strategic vision within these plans? ▪ How will we ensure consistency across strategic plans? ▪ Are stakeholders affected by shortages involved in monitoring and continuous improvement efforts for these plans? ▪ How often are these plans revisited and refined?
Secure funding sources to sustain the work.	**Role Guide** Shortage Strategy Partner Role Guide ▪ Exemplars ▪ Funding Sources GTL Center	▪ What financial resources can the SEA provide to support sustainability and scale-up efforts? ▪ What financial resources can districts provide to support sustainability and scale-up efforts? ▪ How can funding from the SEA blend and braid with other sources of funding from districts and EPPs?
Leverage stakeholder networks to scale shortage strategies to other regions, districts, schools, and EPPs.	**Toolkit** Scaling Up Tools and Resources SISEP **Guide** Roadmap for Educator Preparation Reform CEEDAR Center	▪ What existing stakeholder networks for regions or districts within the state can be leveraged to scale shortage strategies—for example, boards of cooperative educational services (BOCES), cooperative educational service agencies (CESAs), or other state-supported regional education offices? ▪ What existing stakeholder networks for schools within the state can be leveraged to scale shortage strategies—for example, rural school associations, school improvement networks, etc.? ▪ What existing stakeholder networks for EPPs within the state can be leveraged to scale shortage strategies—for example, institutions of higher education networks, councils of deans, etc.?

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