

Workload-Informed Staffing in Special Education: A State Landscape Review and Practical Guide for Leaders

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This brief builds on findings from the [PROGRESS Center](#)

A qualified special education teacher (SET) workforce is essential for ensuring that states and districts meet the requirements of the Individuals with Disabilities Education Act (IDEA), the federal law governing special education, and that students with disabilities receive the services and supports they need to succeed in school. However, a shortage of qualified SETs remains a persistent challenge across states in the Northeast. During the 2025–26 school year, six of the seven Northeast Comprehensive Center (NECC) partner states identified special education as a teacher shortage area in the U.S. Department of Education's Teacher Shortage Areas database (ED, 2026). This mirrors national trends. As of 2025, 45 states reported SET shortages (Learning Policy Institute, 2025), with some states reporting year-over-year SET turnover rates during this period as high as 43% (SPARC Center, 2026).

Further, six of the seven NECC partner states reported relying on uncertified special education teachers to fill vacant positions in the most recent IDEA reporting data (2021–22). This trend is also borne out in the national data, with multiple studies identifying the use of uncertified, emergency-certified, or inexperienced teachers to fill vacancies across districts nationally (e.g., Gilmour et al., 2026; Shaheen & Kistler, 2026; U.S. Department of Education, 2024).

The impact of this shortage is pronounced. Lack of qualified SETs and high turnover is associated with less effective service delivery and weaker student outcomes (Atteberry et al., 2017; Garwood, 2022; Gilmour et al., 2022; Kaler et al., 2026; Klusmann et al., 2022; Ronfeldt et al., 2013; Russ et al., 2001; Sorenson & Ladd, 2020). Persistent shortages increase recruitment and training costs for districts while creating a greater risk for noncompliance with IDEA requirements. When districts

IDEA Requirements for Personnel

States must ensure that the personnel necessary to carry out all services according to students' IEPs are appropriately and adequately prepared and trained and that those personnel have the content knowledge and skills to serve children with disabilities (<https://sites.ed.gov/idea/regs/b/300.156>).

lack adequate staffing to implement IDEA-required individualized education programs (IEPs) as written, they may face increased vulnerability to formal complaints, dispute resolution processes, and corrective actions (IRIS Center, n.d.). At the same time, students with disabilities in the Northeast continue to experience low levels of academic proficiency on the National Assessment of Educational Progress (NCES, 2026). In 2024, averaged across partner states, 8% of fourth-grade students with disabilities scored proficient or above in reading compared to 39% of fourth-grade students without disabilities. There is an urgent need for qualified SETs to provide instructional supports to help these students succeed.

Underlying the shortage of fully-certified SETs are two interrelated trends: a declining pipeline of individuals entering the profession (Harper et al., 2023; Kraft & Lyon, 2024; Nguyen et al., 2025) and high rates of attrition among current SETs (Gilmour et al., 2026; Tan et al., 2026). A growing body of research suggests that the complexity and volume of SETs' job responsibilities contribute substantially to these recruitment and retention challenges. Bettini et al. (2025) identified a broad range of responsibilities that extend well beyond directly working with students and increase the demands on SETs as they complete their work. As summarized in Exhibit 1, these responsibilities span instructional planning and delivery, assessment and progress monitoring, IEP development and compliance activities, collaboration with families and colleagues, paraeducator supervision, student behavior and safety support, and schoolwide responsibilities. Collectively, these responsibilities reflect the multifaceted role that SETs play in ensuring students with disabilities receive the services and support necessary to make progress toward their educational goals.

Exhibit 1. Special Education Teachers' Job Responsibilities
(Adapted From Bettini et al., 2025)

Responsibility	Description
Caseload size and complexity	This is the <i>total</i> number of students that special education teachers (SETs) instruct and support across all settings as well as the varying needs of those students.
Instructional	SETs are often responsible for preparing lessons across content areas and grade level.
Instructional grouping	This is the number of students SETs instruct and support at a time and the different needs of the students.
Special education assessment	SETs may be responsible for assessments, including progress monitoring and re-evaluations.
Paperwork	SETs are responsible for special education paperwork, including IEPs, re-evaluations, evaluations, and progress reports.
Paraeducator supervision	SETs supervise and train paraeducators.

Responsibility	Description
Building family relationships	SETs are expected to collaborate with families, sometimes with extensive communication requirements.
Student performance	SETs may be responsible for teaching state standards to support students with disabilities' performance on standardized assessments.
Student and staff safety	SETs provide student behavioral supports and ensure the safety of all students and staff.
Extra responsibilities	SETs may have additional responsibilities required of all teachers, such as bus duty or hall duty, as well as their own specific extra responsibilities, such as coordinating related services for students or supporting students during lunch.

For many SETs, the breadth of these responsibilities exceeds the time and capacity available to fulfill them effectively, resulting in unmanageable workloads. Research consistently links unmanageable workloads to burnout, reduced job satisfaction, and increased likelihood of leaving the profession (Bettini et al., 2017, 2018, 2020; Brunsting et al., 2023; Cancio et al, 2018; Gilmour et al., 2022). When SETs leave, districts often face difficult staffing decisions. Vacant positions may remain unfilled, requiring remaining SETs to assume larger caseloads and additional responsibilities (Bettini & Gilmour, 2024; Institute of Education Sciences, 2023) – which can, in turn contribute to even greater rates of turnover. Or, as previously described, districts may be forced to rely on un- or underqualified personnel to fill SET positions. In either case, shortages can contribute to a cycle of workforce instability that undermines quality special education service delivery and threatens achievement for students with disabilities.

Ensuring SETs have the time and supports they need to effectively fulfill their many job responsibilities requires a staffing approach that addresses all elements of their jobs. Traditional staffing approaches often focus primarily on caseload—the number of students assigned to an SET. While useful, student counts alone do not capture the full range of responsibilities required to successfully deliver services to students. As states seek strategies to strengthen the SET workforce and improve outcomes for students with disabilities, workload-informed staffing offers a more comprehensive approach to assigning and managing SETs' responsibilities.

This brief examines workload-informed staffing as a strategy for improving special education workforce stability and service delivery. It describes the differences between caseload and workload approaches and analyzes current state policies and practices, nationally and in the Northeast. This brief includes state examples of each type of approach in practice, it concludes by highlighting implementation considerations for state leaders, both within and beyond NECC partner states, and by providing practical resources for states seeking to implement components of the workload approach in their SET staffing systems.

Caseload Versus Workload Approaches to Staffing Special Education

Research identifies two main approaches to making SET staffing determinations: caseload approaches and workload approaches. Although both are intended to help districts allocate personnel and ensure students receive required services, they differ substantially in how they account for SETs' responsibilities.

The Caseload Approach

The **caseload** approach defines staff assignments by the number of students with disabilities assigned to an SET (Williams-Jackson, n.d.). With this approach, districts typically divide the number of students with IEPs by the number of available special education personnel (including SETs and related service providers) and distribute students as evenly as possible among staff. This approach is easy to compute, implement, and track; it allows for clean division of student assignments on paper and appears fair to school personnel, families, and the community.

The simplicity of this approach, however, can obscure substantial differences in the amount of time, expertise, and effort required to meet individual student needs. Two SETs with identical caseloads may have dramatically different responsibilities depending on the intensity of students' services, the complexity of their needs, and the settings in which services are delivered. Although some states adjust caseload expectations based on disability category, instructional setting, service delivery model, or grade level, these adjustments often fail to capture meaningful differences among student needs or service requirements or the full scope of SET responsibilities.

The Workload Approach

The **workload** approach offers a more comprehensive approach to staffing decisions by accounting not only for the number of students served, but also for intensity of needs and the other responsibilities required to support those students. Rather than focusing exclusively on student counts, workload approaches consider the time, effort, and expertise needed to implement students' IEPs, coordinate services, collaborate with colleagues and families, complete compliance-related activities, and fulfill other responsibilities (see Exhibit 1).

Caseload Approach Challenge

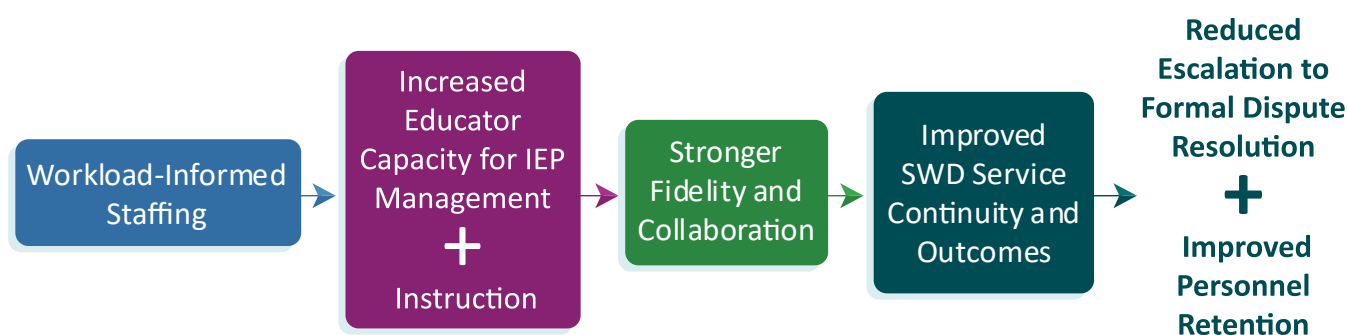
Students who require reading instruction support for 30 minutes of the school day, 3 days per week, may count the same towards a teacher's caseload as a student who requires intensive behavioral and instructional supports throughout each school day. Although both students count as one student in a caseload calculation, the time and effort required to serve them differ substantially.

Workload Approach Solution

A workload approach considers the time, effort, and expertise required to provide a student with instruction and related supports, collecting and analyzing progress monitoring data, collaboratively planning with other colleagues, communicating with families, and conducting documentation tasks. An effective workload approach accounts for *all* the job responsibilities outlined in Exhibit 1.

Under a workload approach, SET staffing decisions are informed by a more complete understanding of student needs and educator capacity. Districts examine the totality of responsibilities assigned to SETs and assess whether available time and resources are sufficient to effectively fulfill them. While this process requires more detailed data (e.g., specific student needs, complete lists of responsibilities, and time estimates) and planning than a traditional caseload approach, it produces staffing decisions that more accurately reflect the level of effort needed to meet student needs (Williams-Jackson, n.d.). By aligning staffing decisions with the actual demands in meeting student needs, districts can make more informed personnel and resource allocation decisions, deploy staff expertise more strategically, and create more sustainable working conditions for special educators (Williams-Jackson, n.d.). Research suggests that workload-informed staffing can strengthen IEP implementation, improve service delivery, support educator retention, and contribute to improved outcomes for students with disabilities (Carlin, 2024; Miller, 2024).

Exhibit 2. The Workload Approach: Implications for Policy and Practice



Although workload approaches offer significant benefits, implementation can be challenging. States or districts must establish processes for identifying, measuring, and monitoring workload across different settings and contexts. This often requires working directly with teachers, school leaders, and community members; collecting data; and developing local procedures and tools. School administrators may also need to adjust schedules, staffing configurations, and service delivery models to ensure educators have sufficient time for planning, collaboration, assessment, and compliance-related activities beyond direct service delivery (Benner & Partelow, 2017). Despite these implementation challenges, workload approaches provide a more accurate representation of the realities of special education practice and offer a promising strategy for improving both educator sustainability and student outcomes.

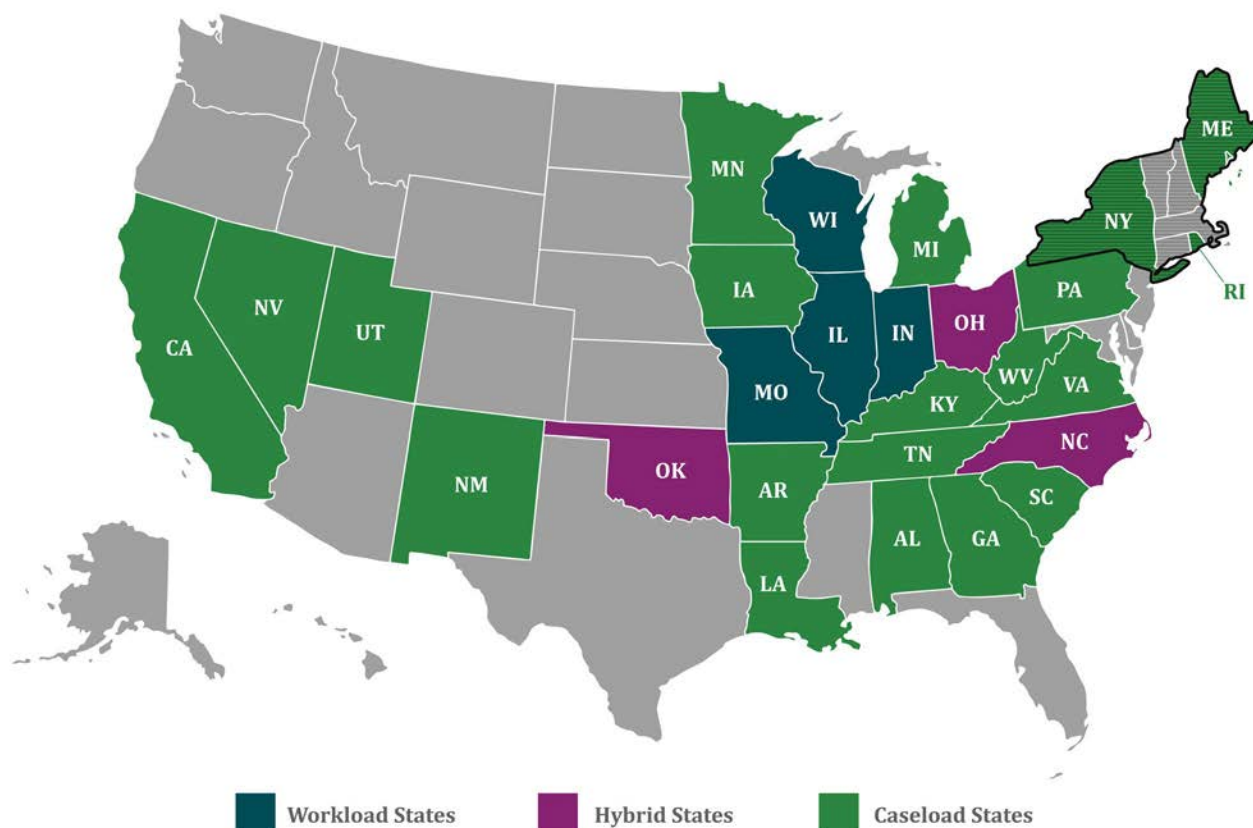
State Approaches to SET Staffing

States take widely varying approaches to guiding special education staffing decisions. According to a scan of state statute and websites conducted in summer 2026, almost half of all states have no

statewide policy or statutory requirements addressing how SET workloads or caseloads should be determined, including NECC states Connecticut,¹ Massachusetts, New Hampshire, and Vermont. Among states with identified staffing policies, the most common approach is a caseload-based model, with twenty states establishing limits or expectations based primarily on the number of students an SET may serve. In contrast, this scan found that four states utilize a workload-based approach by accounting for responsibilities beyond direct student services when determining staffing needs. Three states use a hybrid approach, combining caseload expectations with considerations of factors such as student needs, service intensity, instructional setting, or other workload-related responsibilities.

Across these approaches, states often include the requirement that any staffing decisions should consider educators' ability to implement students' IEPs as written and provide a free appropriate public education (FAPE) in accordance with IDEA requirements. State approaches as identified in this state policy scan are illustrated in Exhibit 3.

Exhibit 3. SET Staffing Approaches by State



¹ As also described within the text later in this brief, recent legislation was passed in Connecticut with the goal of developing workload policies for SETs.

States Using the Caseload Approach

Of states with SET staffing policies, the caseload approach is the most widely used method for determining staffing levels, implemented in 20 states. Using this approach, states establish a maximum number of students that an SET may serve. However, states vary considerably in how they define caseload and count students. Some define caseload based on the number of students for whom a teacher assumes case management responsibilities and manages IEPs, whereas others define caseload according to the number of students in a particular instructional setting or the number of students an SET directly instructs or supports.

Most states adjust caseload limits to reflect differences in student needs, service delivery models, grade levels, disability categories, and instructional settings. Only two states (Alabama and Maine) explicitly use a single statewide caseload cap for all students and service contexts. The differentiated approach acknowledges that students who require more intensive services often demand more educator time and resources.

Although caseload-based approaches can help ensure that staffing levels are aligned with the number of students receiving services, they primarily focus on student-to-SET ratios and compliance with numerical limits. As a result, they often fail to account for the full scope of responsibilities SETs perform, which can significantly affect workload and capacity to deliver high-quality services.

Caseload Approach Example: New York

New York uses a caseload approach that sets maximum student assignments by special education service type. State regulations cap consultant teacher caseloads at 20 students with disabilities, resource room caseloads at 20 students in Grades K–6 and 25 students in Grades 7–12, and self-contained special classes at 15 students (12 students in certain state-operated settings). New York City may operate under approved variances that increase resource room caseload limits. By defining caseload as the total number of students assigned to a teacher and establishing service-specific caps, New York provides clear staffing parameters that support consistent service delivery and help districts align staff assignments with student needs.



States Using the Workload Approach

Workload approaches to SET staffing are less common, with only four states (Illinois, Indiana, Missouri, and Wisconsin) explicitly incorporating a workload approach in statute or policy. Recent legislation in Connecticut tasked the state department of education to develop workload policies for special education personnel. Rather than focusing on the number of students assigned to SETs, workload approaches emphasize whether SETs have sufficient time to implement students' IEPs and fulfill the full range of responsibilities required to provide high-quality services.

These four states require or encourage LEAs to consider one or more of the following factors to effectively serve students:

- nature and severity of student disabilities
- type and intensity of services provided
- instructional planning and preparation
- progress monitoring and data collection
- assessment and reporting activities
- IEP development and case management
- collaboration with general educators and paraprofessionals
- meetings with families and IEP teams

States vary in how they operationalize workload into special education staffing decisions. Some recommend that school districts conduct workload analyses to understand how instructional and non-instructional responsibilities affect SET capacity, leaving final staffing decisions to local discretion. Other states require LEAs to formally consider workload factors when determining staffing levels, often through formal workload tools or decision-making processes that account for both the number of students served and the time needed to provide services and complete related responsibilities.

Workload approaches acknowledge that SET responsibilities extend far beyond direct services to students. These policies encourage staffing decisions that reflect the full scope of SETs' work. As a result, workload-based approaches offer a more comprehensive framework for aligning staffing decisions with the actual demands placed on SETs and may provide a stronger foundation for ensuring both service quality and educator sustainability.

Workload Approach Example: Illinois

Illinois uses a workload-based approach to SET staffing that requires school districts to establish workload limits that ensure SETs can deliver all services identified in students' IEPs at the required level of intensity. To determine appropriate workload limits, districts must conduct a workload analysis of the full range of responsibilities special educators perform, including individualized instruction, consultation and collaboration with colleagues, attendance at IEP meetings and other staff conferences, and reporting requirements. They must then use findings from the analysis to develop workload parameters in partnership with school and district personnel.



States Using a Hybrid Approach

Three states (North Carolina, Ohio, and Oklahoma) use a hybrid staffing approach that combines elements of both caseload and workload approaches. These policies retain caseload guidelines or limits while incorporating workload-related considerations into caseload decisions. In doing so, they encourage districts to account for factors such as complexity of student needs, service intensity, instructional planning, evaluation and assessment responsibilities, and other professional duties that affect educator capacity. Beyond caseload limits, these states consider whether educators have sufficient capacity to implement students' IEPs and provide FAPE.

Hybrid approaches acknowledge that student counts alone do not fully capture SET responsibilities. However, most hybrid models still center staffing decisions on caseload and use workload-related factors only to adjust student-teacher ratios or caseload limits.

Hybrid Approach Case Study: Ohio

Ohio combines caseload limits with workload considerations to guide special education staffing. The state sets maximum caseloads based on students' disability categories and grade levels, with lower caseload limits for students who require more intensive supports. Ohio also requires districts to use a workload-determination process that accounts for instructional services, evaluations, documentation, meetings, consultation, planning, and the intensity of student needs. This hybrid approach helps districts balance student caseloads with the full range of responsibilities that SETs manage.



Implementation Considerations

States have applied principles from both the caseload and workload approaches in different ways to support local decisions about SET staffing. The current landscape suggests that there are opportunities for states without SET staffing policies to adopt or promote workload-informed approaches to SET staffing. States with caseload policies do not need to eliminate existing caseload policies to adopt workload-informed staffing. Instead, states can strengthen current approaches by incorporating workload considerations into staffing decisions, guidance, monitoring systems, and local planning processes. Key implementation considerations are outlined in the following sections.

Define the Policy Landscape

Before adopting new policies or guidance, states should develop a comprehensive understanding of the policy landscape that influences SET staffing. This review should include not only explicit staffing requirements, such as caseload caps and special education funding formulas, but also **broader factors that affect educator responsibilities, including collective bargaining agreements, personnel policies, service delivery requirements, and local operating procedures.** Workload-informed staffing approaches are most likely to succeed when aligned with current requirements. Even in states with established caseload-based approaches, opportunities exist to strengthen implementation guidance. For example, states can reinforce that caseload limits represent maximum thresholds rather than recommended targets and encourage local adaptations that better address SET workloads. Effective staffing systems must be both coherent and actionable within districts, providing districts with clear expectations while remaining responsive to local procedures and contexts. **States should also ensure that they set realistic timelines for policy implementation,** allowing time for districts to build understanding and buy-in for any revisions or new policies that support workload-informed staffing.

Specify Job Responsibilities

A foundational component of any workload-based staffing approach is clearly defining the responsibilities and expectations of SETs. **States can support districts in implementing a workload approach to SET staffing by providing clear definitions of SET responsibilities, recognizing that these responsibilities may vary extensively across districts.** Locally, SETs and other school personnel can work collaboratively to establish norms for the identified responsibilities. This step can help districts measure and allocate the impact of each responsibility to workload. The list of SET responsibilities identified by Bettini et al. (2025), as shown in Exhibit 1, provides a useful starting point for this exercise. Defining responsibilities and associated time expectations allows districts to move beyond student counts and consider the full set of activities necessary to provide high-quality services for students with disabilities.

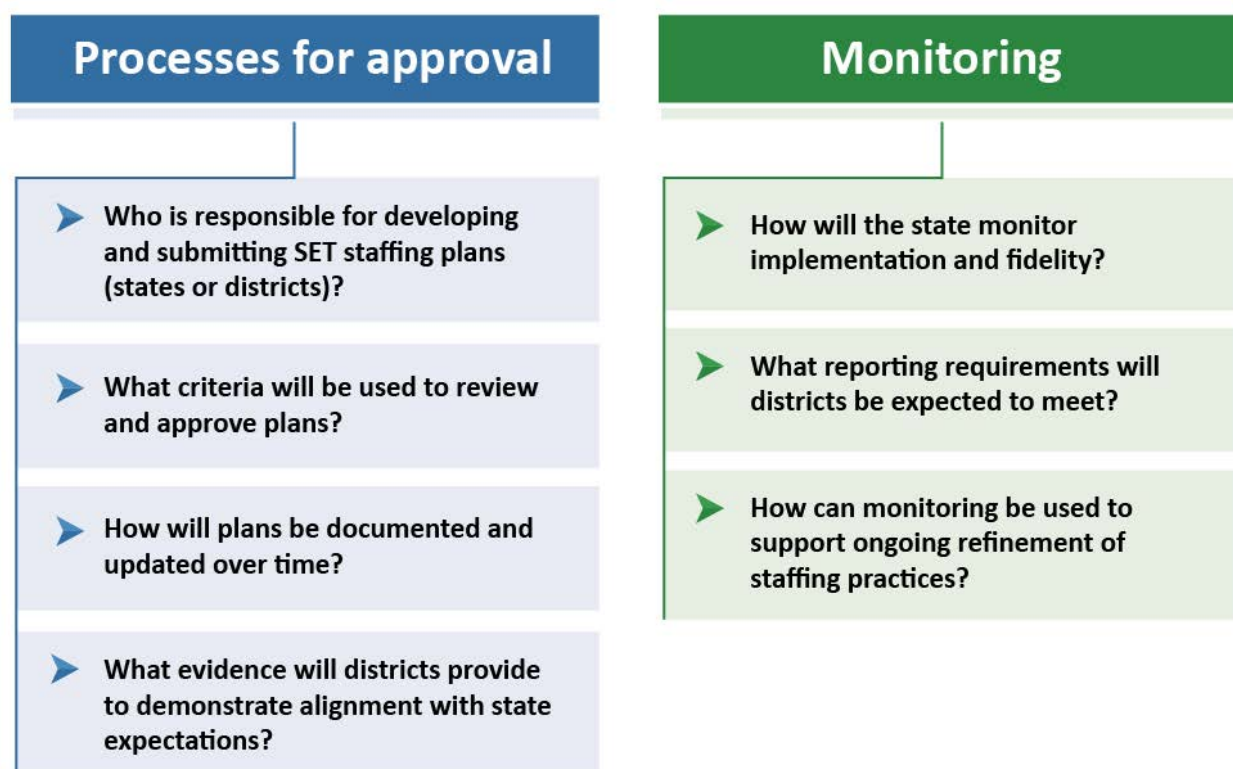
Define State Roles

States must also determine the role they will play in establishing, supporting, and monitoring workload-informed SET staffing systems across districts. **A key policy decision is whether to adopt a statewide SET workload *model* or a statewide SET workload *framework*:**

- A statewide workload ***model*** establishes a common methodology alongside sets of assumptions and decision-making processes that all districts are required to use when determining staffing needs.
- A statewide SET workload ***framework*** outlines guiding principles, required components, and minimum expectations while allowing districts to develop their own locally responsive workload models that reflect their unique contexts and priorities.

Most states that currently incorporate workload considerations favor the framework approach, which balances statewide consistency with local flexibility.

States may also need to establish processes for implementation, approval, and oversight if these processes are not already well-defined. Key decision points may include the following:



Communicate Goals and Purpose

As with any policy change, efforts to revise SET staffing approaches may be met with initial uncertainty and resistance. District leaders and educators may perceive new staffing requirements as disruptive, resource intensive, or difficult to implement. Consequently, states must **proactively** communicate the rationale for the change and clearly articulate the goals and expected outcomes of a revised SET staffing approach (DeMatthews et al., 2025).

Effective communication should emphasize that workload-informed staffing is designed to strengthen educators' capacity to provide high-quality services, improve implementation of IDEA requirements, and create more sustainable working conditions for SETs. States should acknowledge the challenges districts may face during implementation while consistently reinforcing the long-term benefits for students, educators, and school systems.

Conduct Ongoing Review and Evaluation

To support successful adoption and continuous improvement, states should invest in ongoing evaluation of workload-informed staffing policies to determine whether they achieve intended outcomes, such as reduced SET turnover, improved educator satisfaction, stronger IDEA implementation, and better outcomes for students with disabilities. Continuous evaluation and feedback can help states refine policies over time and ensure that staffing decisions increasingly reflect the realities of SETs' work.

Resources

Adopting a workload-informed approach to SET staffing requires more than policy change alone. To produce meaningful improvements in educator capacity, service delivery, and outcomes for students with disabilities, states must provide districts with practical tools, guidance, and implementation supports. **Resources should help districts translate policy into action while maintaining the flexibility to reflect local contexts, service delivery models, staffing structures, and expectations for SET responsibilities.**

Workload-informed approaches to SET staffing at scale are emerging, but few empirically validated tools currently exist. States can support implementation by developing or adapting resources. The resources described in Exhibit 4 should be considered starting points for developing resources aligned with state and district needs. These resources also illustrate that there are many possible approaches to implementing workload-informed SET staffing.

Exhibit 4. Examples of Resources to Support Workload-Informed Approaches to SET Staffing

Resource	Description
Ohio's Service Provider Ratio and Workload Calculation	Ohio's Department of Education and Workforce provides a calculator that districts may use to assess workloads. The calculator focuses on the time required to complete responsibilities and whether this time aligns with contracted work hours. One strength of this tool is the clear inclusion of specific job responsibilities. Because Ohio has a hybrid approach to SET staffing, the tool includes a tab for calculating weighted caseloads when an SET works with students with varied needs.
American Speech-Language-Hearing Association (ASHA) Workload Calculator	ASHA's tool allows providers to calculate the time required for direct services, indirect services, indirect services in general education, compliance activities, and other activities. One limitation of this tool is its broad responsibility categories, which may result in inaccurate reporting if specific responsibilities are forgotten or reported inconsistently. Although developed for school-based speech-language pathologists, this tool could be modified for SETs.
Oklahoma's Workload Calculation	Oklahoma Education's calculator both considers the caseload total and calculates a workload score based on the teacher role, evaluation and IEP responsibilities, school sites, grade levels, service delivery type, and service minutes. SETs enter values that are then weighted to calculate a total score that is compared to a state cut-off. The calculator acts as a statewide model.

Resource	Description
Wisconsin Department of Public Instruction Considerations for Determining Special Education Workloads	Wisconsin provides guidance to LEAs on adopting workload-informed approaches to staffing special education services. The document highlights responsibilities to consider in SET workload models while noting the need for local adaptations and decision making. The document also links to resources developed by the Wisconsin Council of Administrators of Special Services, including two tools for calculating workload. The first tool, adapted from guidance originally developed by the Missouri Department of Elementary and Secondary Education, calculates workload based on time required for specified job responsibilities. The second tool calculates workload by examining the number of students in need of various supports. These tools and guidance resources act as frameworks for districts.

Note. The Northeast Comprehensive Center does not endorse any specific model or tool.

Conclusion

Ensuring that students with disabilities in schools across the Northeast receive the services and supports they need to succeed in school and life requires access to effective SETs. Yet persistent shortages of SETs continue to challenge districts' ability to recruit, retain, and support the workforce needed to meet the needs of students with disabilities and fulfill the requirements of federal law.

By adopting staffing policies that account for the breadth of SET responsibilities, states can take an important step toward creating more sustainable and equitable working conditions for SETs. More comprehensive staffing approaches can help reduce chronic overload, improve job satisfaction, decrease burnout and turnover, and strengthen districts' ability to recruit and retain a highly qualified workforce.

Ultimately, workload-informed staffing is not simply a workforce strategy—it is a student outcomes strategy. When SETs have the time and capacity to effectively fulfill all their job responsibilities, students with disabilities are more likely to receive the high-quality services envisioned under relevant federal laws such as IDEA. Developing thoughtful and flexible policies and providing ongoing communication, implementation, and evaluation supports to promote their success can allow states to strengthen both the SET workforce and the educational outcomes of students with disabilities.

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