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Navigating Crises: A Study of Special Education Administrative Problem-Solving Amid Institutional Constraints and Opportunities

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by

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Professor Kathleen Mortier, Co-chair
Professor Anne Cunningham

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Abstract

Navigating Crises: A Study of Special Education Administrative Problem-Solving Amid Institutional Constraints and Opportunities

by

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Special education administration faces a myriad of challenges in regular times, exacerbated during crises such as the COVID-19 pandemic. This dissertation investigates how special education administrators navigate and resolve problems amid significant institutional constraints and unprecedented global disruptions. The research focuses on the problem-solving strategies employed by nine special education administrators in Northern California during the transition to remote learning due to the pandemic, highlighting the dynamic between institutional frameworks and administrative agency. The legal battles that have shaped special education have led to improved inclusivity and support services, necessitating specialized administrative roles to manage these advances effectively (Winzer, 1993; Yell et al., 1998). Administrators are tasked with interpreting laws, managing individualized education plans, and leading reforms to enhance educational outcomes (Boscardin, 2007; Mayer, 1982; Prillaman & Richardson, 1985).

Employing a qualitative research approach, the study utilized participant observation, extensive field notes, and in-depth interviews to capture the dynamic interactions and decision-making processes among special education administrators. Conducted from November 2020 to June 2021, the research involved approximately 60 hours of observed meetings and 33 hours of formal interviews, providing an in-depth exploration of cognitive and emotional responses during administrative problem-solving sessions.

Central to the study were "change projects" initiated by the administrative teams to address challenges during the pandemic. These projects involved extensive, iterative problem-solving

efforts and focused on adapting educational practices to remote learning environments, enhancing accessibility, and ensuring compliance with educational standards under new operational conditions. The analysis of these projects revealed significant strategic shifts, including the deployment of new technologies and the redesign of service delivery models.

The findings underscore the complex interplay between institutional constraints and administrative agency. Despite rigid institutional structures, administrators demonstrated considerable ingenuity and resilience, navigating through and occasionally circumventing these constraints to foster educational continuity and innovation. The pandemic highlighted the essential roles of these administrators and magnified the need for adept problem-solving capabilities in crisis situations (Bryk et al., 2015; LeMahieu et al., 2017).

The study concluded that while institutional constraints can limit administrative flexibility, they also precipitate innovative responses that can lead to substantial organizational learning and change. Administrative problem-solving during the pandemic underscored the critical need for institutions to support adaptive leadership and to cultivate environments where creative solutions are encouraged and valued.

The conclusions drawn from this research advocate for policy reforms that enhance the autonomy of special education administrators, enabling them to implement adaptive strategies effectively during crises. Moreover, the study contributes to the broader discourse on institutional resilience, suggesting that crisis-induced changes can serve as catalysts for enduring improvements in educational systems.

This dissertation provides a comprehensive analysis of how special education administrators contend with crises within tightly regulated institutional frameworks. The insights from this research highlight the importance of fostering administrative agility and supporting innovation to address the multifaceted challenges faced by special education systems today.

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CHAPTER 1: INTRODUCTION TO THE DISSERTATION

The journey of special education is undeniably one of legal battles fought by students with disabilities, their families, and allies to better the educational opportunities for this population. These battles have resulted in improved access to public schools, inclusion in general education curriculum and peer settings, and related support services for students with disabilities (Winzer, 1993; Yell et al., 1998). And, with such legal demands came the need to regulate, administrator, and manage the hard-won educational rights of students with disabilities and their access to a meaningful, beneficial education (Mayer, 1982; Prillaman & Richardson, 1985). From these legal needs was born the role of the special education administrator (Boscardin, 2007; Mayer, 1982; Prillaman & Richardson, 1985).

Special education administrators' roles and responsibilities span interpreting and implementing both new and existing laws, overseeing educational programs, collaborating with stakeholders, advocating for programs, and managing various administrative tasks such an individualized education plans (IEPs), evaluating educators, determining student eligibility for specialized programs, budget management, collaboration with various professionals (e.g., speech and language pathologists, occupational therapists; Boscardin, 2007; Mayer, 1982; Prillaman & Richardson, 1985). Additionally, they are entrusted with spearheading system-wide reform initiatives aimed at improving the quality of special education classrooms, teaching, and educational outcomes for students with disabilities (Boscardin, 2007). During even the smoothest of school years, special education administrators navigate a complex landscape of student needs, educational standards, and legal requirements (Boscardin, 2007; Mayer, 1982; Prillaman & Richardson, 1985). They work to balance IEPs with systemic demands, ensuring all students receive the support they need to thrive academically and socially.

However, the multifaceted role of special education administrators was put to an even greater test when, in March of 2020, classrooms across the United States went dark as Americans headed into lockdown due to the COVID-19 pandemic (Reyes-Guerra, 2021). Overnight, the structure of schooling fundamentally shifted, presenting unique challenges for special education administrators. As schools transitioned to remote learning, special education administrators, like other administrators (Reyes-Guerra, 2021), found themselves at the forefront of ensuring that the rights and needs of students with disabilities were met despite the unprecedented circumstances.

Reflecting on the intensified challenges that arose during the COVID-19 pandemic, it's clear that the crisis highlighted and magnified the essential roles of school and district administrators, especially within the realm of special education. This situation, as depicted in the literature, points to an ideal where administrators are envisioned as adept problem-solvers (see (see Bryk et al., 2015; LeMahieu et al., 2017) armed with systematic tools like inquiry cycles to address the multifaceted challenges presented by the pandemic. Yet, if many administrators, including special education administrators, are not trained in problem solving they may be missing skills crucial for navigating the uncharted waters of the pandemic.

Even outside of the pandemic, problem-solving is far from a nebulous endeavor; it is intricately tied to the structural fabric of the institution itself (Scott, 2013; 2005). Institutions, with their layered complexities, delineate the boundaries within which problem-solving can occur, effectively shaping a team's action space. This is particularly evident in the context of special education, where administrators navigate through a landscape defined by institutional constraints and potentialities that are not of their choosing (Friedland & Alford Robert, 1991; Meyer & Rowan, 1977, Scott, 2005). These elements are institutionalized, meaning they are ingrained within the collective consciousness of the institution—imbued with significance,

assumed to be the norm, and thereby significantly influencing human behavior (Scott, 2013; 2005). However, these institutions are not immutable monoliths exerting unilateral influence. They are, instead, riddled with contradictions, divergent goals, and values presenting a series of dilemmas and quandaries (Friedland & Alford Robert, 1991; Meyer & Rowan, 1977, Scott, 2005). It is within these complex interstices that individuals and groups may find agency to act on problems or flee from them.

The unique challenges brought by the pandemic—ranging from the rapid shift to online learning to ensuring equitable access and support for students with disabilities (Reyes-Guerra, 2021)—coupled with the special education institutional context created a unique environment in which special education administrators' problem solved. Despite the undeniable importance of problem-solving in their roles (Bryk et al., 2015; LeMahieu et al., 2017), particularly during the pandemic, there remains a notable dearth of research examing how these leaders, especially teams of special education administrators, actually problem solve while also managing the other aspects of their work.

The Proposed Study

This study embarks on a critical exploration of how special education administrators confront and navigate the intricate challenges inherent to their roles, especially highlighted during crises such as the pandemic. Despite the essential nature of their responsibilities, there is a notable scarcity of research focusing on the problem-solving strategies employed by these administrators within the unique and multifaceted context of special education. This dissertation aims to bridge this gap by examining the problem-solving endeavors of nine special education administrators—including the special education director, the compliance coordinator, the programs coordinator, and six program specialists—through their interactions and problem-solving processes during regular meetings and when solving special education-specific issues. This study employs participant observation (Brannan & Oultram, 2012; DeWalt & DeWalt, 2011), a method particularly suited for investigating micro-level communication dynamics such as group interactions, emotional expressions, and cognitive processes involved in problem-solving. Using such methods, this dissertation reveals how the broader institutional frameworks of the special education context not only imposes constraints and offers opportunities, but also significantly molds the administrators' problem-solving actions. This study underscores that, although institutional structures exert a profound influence on decision-making, they can also harbor spaces for ingenuity, allowing administrators to wield agency and innovation in their problem-solving approaches. Through this lens, the dissertation highlights the complex interplay between the administrators' problem-solving activities, the pandemic, and the institutional peculiarities of the special education environment, asserting that these elements, far from being static or limiting, actively contribute to shaping creative and adaptive solutions to challenges.

Dissertation Overview

This dissertation is structured as follows: chapter one serves as an introduction to the dissertation, outlining the environment in which special education administrators operate. Chapter two establishes a theoretical framework for investigating problem-solving among special education administrators. To deepen our understanding of the problem-solving efforts of special education administrators in this research, I delve into several critical areas within the existing literature. First, I discuss the definitions and characteristics of what makes up an institution. Second, I underscore the inherent conflicts and challenges that emerge from the dynamics of institutions. Third, I explore how institutions manage crises, particularly in light of the disruptions brought on by the pandemic. Fourth, I provide an overview of the specific

institutional context of special education, along with the unique challenges it presents. Fifth, I apply concepts of adaptation and integration from organizational theory to illustrate how organizations and their members respond to crises. Sixth, I examine how teams deal with complex problems and proceed to describe the intricacies of problem-solving, including its cognitive and emotional components, as well as the dynamics within teams during such processes. Finally, I outline three scenarios to demonstrate potential approaches that special education administrators might adopt to address problems during times of crisis and amidst institutional challenges.

Chapter three details the research design and methods undertaken to analyze the data collected. This study employs participant observation between November 2020-June 2021 with nine special education administrators in one challenged school district in northern California. These nine administrators constituted two groups: a) the director and coordinators team consisting of the district's special education director, the program coordinator, and the compliance coordinator; and b) the program specialists team consisting of the six program specialists, the coordinators, and at times, the special education director. This chapter describes the rationale for this methodology, criteria for selecting these groups and district for the study, and the strengths and limitations of this research design. The data for the study consist primarily of field notes and audio records collected from about 60 hours of group meetings and 33 hours of formal interviews and reflective conversations with the participants. This chapter describes the data analysis which revealed how the micro-level communication of the team, problem solving capabilities (i.e., the cognitive processes associated with problem solving), and the emotional side of problem solving, is influenced by the macro-institutional special education context and its perceived values and priorities during the pandemic.

Chapter four lays out the findings, which is organized in five key sections. First, an examination of interviews and reflective discussions concerning the impact of the special education context and the COVID-19 crisis on the ABC school district, influencing team priorities, actions, and reactions. Second, a general analysis of how teams utilized their meeting time, accompanied by interviews and reflective conversations regarding participants' perceptions of meeting effectiveness. Third, an in-depth analysis of team communication patterns to uncover interaction dynamics. Fourth, a comprehensive analysis of two complete meetings to explore micro-level cognitive and emotional dynamics within the team, especially during problem-solving sessions. Fifth, a look at what I call "change projects", which represent extended problem-solving endeavors that may occur over many meetings.

In chapter five, the dissertation concludes with a discussion of how the findings relate to the literature cited in chapter two, what the findings reveal about the macro-institutional level of the special education context, the micro-level of team dynamics, and the cognitive and emotional processes of problem solving with all of this situated during the pandemic. The chapter concludes with a consideration of developmental supports needed to support special education administrators when problem solving especially under adverse conditions such as a pandemic.

CHAPTER 2: THEORETICAL FRAMEWORK

The literature positions administrators to be the problem-solving leaders of their schools and districts with the capabilities to explore and solve their district's problems in a systematic way (e.g., inquiry cycles; see Bryk et al., 2015; Mintrop & Zumpe, 2019; Mintrop et al., forthcoming), yet many district administrators are not trained to problem solve. This gap in training is particularly pronounced in special education administration, where problem-solving is, ultimately, at the core of their work as teachers look to them for support (Bettini et al., 2017).

Special education administrators navigate a distinct context, intertwined with but also distinct from general education, presenting a myriad of challenges that require problem-solving. Despite the critical importance of problem-solving in their work, there is limited understanding of how teams of special education administrators tackle the complexities of their circumstances and context, highlighting the need for further exploration in this area.

To gain deeper insights into the problem-solving actions of the special education administrators in this study, I engage with several key areas of literature. First, I speak to the literature on what constitutes an institution. Second, I highlight the inherent contradictions and quandaries posed by institutional dynamics. Third, I examine the literature on how institutions navigate crisis considering the disruptions caused by the pandemic. Fourth, I detail the institutional context of special education and the quandaries that arise from this context. Fifth, I bring in the concepts of adaptation and integration from organizational theory to highlight how organizations and those within them respond to crisis. Sixth, I investigate how teams navigate problem complexity followed by an examination of what problem solving as a process entails including the cognitive and emotional aspects, as well as team dynamics present during problem solving events. Lastly, I present three scenarios that reveal possible ways that the special education administrative might undertake to solve problems amidst crisis and the institutional quandaries.

Institutions

As noted in the introduction, special education administrators fulfill various roles, yet problem-solving stands out as central to their duties. Despite this centrality, the problem-solving literature, as highlighted by Bryk et al. (2013), often neglects institutional contexts. It is crucial to recognize that the work of these administrators is embedded within institutional frameworks, which influences the challenges they face and the nature of their responsibilities. To understand what we mean by "institutional," it is important to come to understanding of how an institution is defined and understood in the literature. Richard Scott, one of the foremost scholars in the area of institutions provides a concise definition of institutions and their functions.

In Scott's framework (2013), institutions that are multifaceted. First, they have attained a high degree of resilience that operates in various realms including legal, educational, and economic systems. They are characterized by the presence of established rules and norms that guide the behavior of individuals and organizations within them. Institutions, according to Scott, are not just organizations (i.e., formal structures which have specific functions or purposes); they are more encompassing systems that are taken for granted and have deep structures guiding cultural-cognitive, regulative, and normative aspects of behavior that in combination provide stability and meaning to social life. Scott calls them pillars of institutions. These pillars persist over time and explain the extraordinary power of institutions governing or shaping our ordinary behavior (Scott, 2013).

The Cultural-Cognitive Pillar

According to Scott (2013), the cultural-cognitive pillar refers to the shared conceptions and beliefs that shape the nature of reality and the frames through which meaning is made. It involves the shared understandings and common frames of reference that individuals in the institution use to make sense of the world and their role within it. A logic of orthodoxy and taken-for-grantedness guides behavior in a subconscious way. In this way, shared ideas, beliefs, and mental models are stable deep assumptions that constitute the categories with which we comprehend social reality as we partake in the various institutions of society.

Regulative Pillar

This aspect of institutions involves the capacity to establish rules, laws, and sanctions (Scott, 2013). The regulative pillar is based on the logic of instrumentality and expedience, enforcing certain behaviors through formal mechanisms. This pillar is concerned with the creation of rules that members of the institution must follow, the monitoring of adherence to these rules, and the enforcement of compliance through sanctions such as fines or penalties (Scott, 2013). It represents the formal legal framework within which institutions operate and is mostly conscious.

The Normative Pillar

According to Scott (2013), the normative pillar relates to the values, norms, and roles that prescribe certain behaviors within the institution. Unlike the regulative pillar, which is based on formal rules, the normative pillar is based on social obligation and the shared understanding of what is considered appropriate which involves norms that introduce a prescriptive, evaluative, and obligatory dimension into social life. The normative pillar is upheld through social obligation and the moral governance of behavior by those engaging in it. While cognitive aspects of institutions structure the perception of reality by proving the categories with which we can think about this reality, the normative power of institutions is reproduced through feelings of shame and guilt.

Education as an Institution

Based on the work of Scott (2013) and other educational and social scientists (Hodgson, 2006; Meyer & Rowan, 1977; Strang & Meyer, 1993), an institution is typically understood as a structure or mechanism of social order that governs the behavior of individuals within a community. These institutions, recognized for their social purposes and permanence, transcend individual human lives and intentions, playing a crucial role in creating and enforcing rules governing cooperative human behavior (Hodgson, 2006; Scott, 2013). The institution of education, in particular, serves multiple social functions, embodying structured systems, regulatory frameworks, and enduring qualities, thereby underscoring its foundational role in society (Meyer et al., 1981).

However, beneath the surface of this apparent stability and harmony lies a complex web of ambiguities or puzzles that challenge the institution and those working within it (Meyer et al., 1987; Scott 2005). While educational institutions align with societal views and values through their commitment to fostering learning and societal development (Scott 2005; 2013), they also harbor inherent puzzles which reveal themselves through the daily experiences of those operating within the institution (Meyer et al., 1987; Scott 2005). For instance, educators and administrators may grapple with the puzzle of balancing the diverse and numerous needs of students—such as personalized learning experiences and comprehensive support services (e.g., counseling)—with the reality of finite resources such as limited funding and materials (Meyer et al., 1987). Another example can be seen in the balance between the principles of selection and nurture within educational institutions. While the overarching goal of education is to foster the growth of all students (Lijadi, 2019), these institutions also employ selective measures such as standardized testing (Booher-Jennings; 2005) and competitive admissions. These examples point to deeper contradictions inherent in the educational system as discussed below.

Institutions and Contradictions

The contradictions emerge because although institutions mirror societal values, norms, and beliefs, these are typically tacit (Scott, 2013; Thornton et al., 2012). This characteristic leads to a disparity in how individuals perceive and experience such values, norms, and beliefs in practice. In institutional theory, particularly within the fields of sociology and organizational

studies, a *contradiction* is often defined as a situation where there are conflicting values, beliefs, rules, or practices within or between institutions (Friedland & Alford Robert, 1991; Meyer & Rowan, 1977, Scott, 2005). These contradictions can arise from the coexistence of multiple, often competing, institutional logics, norms, or expectations that guide behavior within social structures (Friedland & Alford Robert, 1991; Meyer & Rowan, 1977; Scott, 2005). There are several different kinds of contradictions that can arise when there are competing logics within or between institutions—institutional duality and conflict, decoupling, and identity and role conflicts. Although there are more contradictions that could raises, outside of these three factors (e.g**.,** institutional isomorphism), I focus on these three factors due to their prevalence in the educational system.

Institutional Duality and Conflict

Institutional duality refers to the presence of two or more conflicting values or norms within the same institution (Hashemi et al., 2023). This duality can create tensions as individuals and groups within the institution navigate these conflicting expectations and may arise when schools aim to balance two conflicting values, such as academic excellence and inclusivity (Dover & Lawrence, 2010 & Hashemi et al., 2023). For example, a school may prioritize academic rigor and high achievement standards to maintain its reputation and attract high-performing students or engage in educational triaging—the practice within educational institutions of allocating resources and attention primarily to students perceived as academically promising, perpetuating disparities and marginalization among those deemed less likely to succeed (Booher-Jennings, 2005). However, this emphasis on excellence and triaging may clash with efforts to foster inclusivity and support students with diverse learning needs, such as those with disabilities. This tension between prioritizing academic success and ensuring inclusivity can create challenges for educators and administrators as they navigate conflicting expectations and allocate resources (Meyer et al., 1981; Meyer et al., 1987).

Decoupling

Decoupling involves a disconnection between the formal policies or structures of an institution and its actual practices (Scott, 2005; Weick, 1976, 1995). Organizations often adopt policies to align with societal expectations or regulatory requirements but may not fully implement them due to various constraints like lack of resources, conflicting priorities, or resistance to change (Misangyi, 2016; Seo & Creed, 2022; Scott, 2005; Weick, 1976, 1995). In education, decoupling (Scott, 2005; Weick, 1976, 1995) may occur when schools or educational institutions adopt policies or initiatives aimed at promoting diversity and inclusion but fail to fully integrate these principles into their actual practices and organizational culture. For example, a school district may implement a diversity and inclusion policy that emphasizes equitable access to educational opportunities for students from diverse backgrounds.

Despite the formal adoption of these policies, the school may continue to face challenges in addressing systemic barriers to equity and inclusion, which could arise from disparities in resource allocation among schools or within them (Meyer et al., 1981; Meyer et al., 1987), resulting in unequal access to quality education for students from low-income communities or minority groups. In this instance, there is a decoupling between the formal policy espoused by the school district and the actual practices and outcomes experienced by students and staff. While the policy reflects the institution's commitment to diversity and inclusion, the implementation of initiatives may be hindered by structural barriers, resource constraints, or resistance to change within the organization (Scott, 2005; Weick, 1976, 1995). This decoupling

highlights the gap between stated organizational values and the lived experiences of stakeholders within the educational system (Misangyi, 2016; Seo & Creed, 2022; Weick, 1976, 1995).

Identity and Role Conflicts and Ambiguity

Individuals within institutions may experience conflicts between their personal identities and their professional roles. *Role conflict* is characterized by the extent of inconsistency or discordance in the expectations or demands conveyed to an individual (Bostrom, 1980; Kahn et al., 1964; Rizzo et al., 1970, Miles, 1977) whereas *role ambiguity* is defined as a situation wherein the expectations communicated to the focal individual are unclear, vague, or ambiguous, posing challenges for the individual to meet the required standards (Bostrom, 1980; Kahn et al., 1964; Rizzo et al., 1970). Role conflict and ambiguity, though distinct from one another, tend to arise in the same settings (Bostrom, 1980). This can occur when the values or practices of the institution conflict with an individual's personal beliefs or ethical standards or when a focal individual is reluctant to accept messages or send out messages to other parts of the organization from a "role sender" (Bostrom, 1980, p. 94) or sends the message ineffectively. A role sender is an individual or entity within an organization or social context (e.g., supervisors, managers, or the institution itself when disseminating policies and guidelines) who communicates expectations, requirements, or responsibilities to another individual regarding their role or position within that context (Bostrom, 1980).

Role conflict and ambiguity may appear, for example, when a teacher who believes strongly in student-centered, inquiry-based learning methods but is required by their institution to strictly adhere to a standardized curriculum focused on rote memorization and test preparation. This conflict between the teacher's personal educational philosophy and the institutional requirements may create a quandary for the teacher and can lead to feelings of frustration, moral dilemmas, and challenges in maintaining motivation and engagement in their work (Kahn et al., 1964; Rizzo et al., 1970, Miles, 1977).

Contradictions, like the ones mentioned in this section, are inherent in institutions with the individuals under the institution navigating them daily (Friedland & Alford Robert, 1991; Meyer & Rowan, 1977, Scott, 2005). Despite these contradictions, the educational institution remains resilient; and yet these contradictions also represent vulnerabilities within the institution, serving as potential points of weakness where some have noted that crisis could lead to its collapse (Friedland & Alford Robert, 1991; Meyer & Rowan, 1977, Scott, 2005).

Institutions Amidst Crisis

Though institutions persist through the generations, they are not impervious to disruption and chaos especially amid societal upheaval and crisis (Scott, 2013). Considering the significant upheaval in education caused by the COVID-19 pandemic, it is crucial to examine how institutions, and by extension, the individuals within them, react to crises.

The Pandemic

The COVID-19 pandemic precipitated a crisis in public education, characterized by uncertainty and rapid, undesirable changes. Governments worldwide responded with measures such as lockdowns and social distancing, disrupting traditional schooling systems. This upheaval necessitated swift adaptation from schools, mainly in the form of remote learning and teaching leading to chaos for the institution of education (Reyes-Guerra et al., 2021; Mete Yesil et al., 2022; Tremmel et al., 2020; Sayman & Cornell, 2021). The pandemic removed the foundations of established routines, including physical school buildings, classrooms, and face-to-face interactions, creating an unprecedented situation for all involved (Reyes-Guerra et al., 2021).

The pandemic as a crisis was far from a straightforward challenge warranting a clear-cut response from educational leaders such as principals, superintendents and other administrators (Reyes-Guerra et al., 2021; Whitla, 2003). Instead, this crisis was particularly complex and distressing for educational leaders and all involved stakeholders (Reyes-Guerra et al., 2021; Smith and Riley, 2012), with mismanagement posing a substantial risk to the organization's well-being (Coombs, 2007). As such, school and district administrators found themselves in a crisis where they needed to make decisions amidst uncertainty, communicate with multiple stakeholders (e.g., other administrators, teachers, parents, and students), support the rapid adoption of remote learning technology and teaching strategies, managing financial resources, and help to maintain staff and student well-being (Johnson et al,, 2020; Reyes-Guerra et al., 2021; Roff, 2021). The pandemic required all administrators, including special education administrations, to take concrete actions to adapt and provide consistent services and education to students and problem solve a variety of issues that could be arise from the pandemic crisis (e.g., lack of access to remote learning technology, delivery of instruction, conducting online IEPs).

How Institutions Respond to Crisis

As explored in the sections above, institutions bring about certain contradictions which often leads to certain quandaries for those within the organization. These quandaries and contradictions often persist when there is no institutional chaos or the status quo of society continues (Farazmand, 2003; North, 1990; Ostrom, 2015). However, it is during crisis, such as the pandemic, when the institution is rocked by chaos, it can and does influence how the quandaries are handled (e.g., the quandaries dissolve, strengthen) and whether the institution persists or not. When institutions face upheaval, the literature on institutional theory (Farazmand, 2003; North, 1990; Ostrom, 2015) suggests they typically follow one of two paths: either they deteriorate under the pressure, or they improve.

Institutional Response: Deterioration

Bases upon works of Farazmand (2003), North (1990), and Ostrom (2015), I define *deterioration* in the face of crisis when an institution lacks the capability to adapt, evolve, or self-organize. With a deteriorating institution, the contradictions become rifts that cannot be bridged anymore (North, 1990; Ostrom, 2015) resulting in the quandaries relied upon being dissolved. Consequently, members within the institution would need to address underlying issues and either disengage from them completely or strive to reconstruct the institution. This can result in a loss of trust and credibility for the institution among stakeholders and the community it serves may experience disruptions in services or support.

Institutional Response: Improvement

Drawing from Farazmand (2003), North (1990), and Ostrom's (2015) concepts, *improvement* refers to an institution adapting to changes, providing clear guidelines, and rebuilding or sustaining public trust in a way that reflects the changing societal values and norms. Here, members of an institution may be able to position a quandary differently than before. For example, historically, schools have placed academics ahead of other priorities (e.g., mental health); however, during the COVID-19 crisis, administrators, faculty, and teachers were able to position student well-being over academics as students were dealing with extreme stress and burnout (Reyes-Guerra, 2021). Additionally, administrators and others within the organization could disregard routines that are no longer viable during the crisis and turn their focus to urgent issues including re-evaluation of the institution and organization’s goals and how they will accomplish them. For instance,

Alternatively, organizational members may more strongly adhere to established guidelines to maintain stability amid chaos (Farazmand, 2003; North, 1990; Ostrom, 2015). Thus, institutions serve as anchors in uncertain times, their continued operations and principles offering continuity and security, enhancing their role as reliable reference points and stability sources. Here, members adhering to established guidelines for stability contribute to a more predictable environment, meaning that quandaries become engrained and tend to favor the institution's operational and regulatory frameworks (e.g., laws such EHA and IDEA). For example, adherence to compliance-based measures may become more rigid as the institution of special education is particularly compliance-oriented, pushing pedagogy to the side.

Special Education as an Institution

Special education as an institution has been significantly shaped by legislative acts and judicial decisions, which constitute its current structure. The passage of the Education for All Handicapped Child Act (EHA; 1975) and its evolution into the Individuals with Disabilities Education Act (IDEA; 1990, 1997, 2001) represents a crucial regulatory framework that mandates specific rights and services for students with disabilities. As such, these laws ensure access to free and appropriate public education in the least restrictive environment, setting standards for evaluation, placement, and educational planning through IEPs (EHA, 1975; IDEA, 1990, 1997, 2001).

To push educational reform for students with disabilities, governments and advocates have opted for legal enforcement as their method to pursue their objectives, inevitably leading to increased legislation that governs these students' education (Skrtic, 1991; Skrtic & McCall, 2010). This poses a challenge for educators and their administrators since the quality of education cannot simply be legislated; it demands dedication and investment of time from educators. Administrators find themselves caught in the middle of this dilemma as they work to serve students and the legislation that surrounds their education.

Special Education Institutional Quandaries

The institution of special education faces its own contradictions (Scott, 2005) revealing a stark contrast between ideals and realities and such contradictions lead to quandaries for those on the ground (e.g., teachers, administrators). Within this framework, the concept of *quandary* encapsulates the intricate challenges individuals face as they navigate conflicting options and considerations within their professional roles, as evidenced by studies on special education teacher burnout (see Billingsley, 2004; Billingsley & Betinni, 2019; Billingsley et al., 1993; Brownell et al., 1997; Brunsting et al., 2014; 1995; Darling-Hammond, 2012; Washburn-Moses, 2005) and compliance (see Richardson & Parker, 1993; Skrtic, 1991). In the following section, I outline several saliant quandaries: a) pedagogy versus compliance, b) siloing vs cross-functional collaboration, c) power vs powerlessness, d) bureaucracy vs improvisation, d) workload overwhelm versus task accomplishment, and e) special education teacher shortage versus sufficient basic capacity.

Pedagogy versus Compliance Quandary

Special education pedagogy refers to the specialized instructional approaches, strategies, and methods used to teach students with disabilities (Norwich & Lewis, 2007; Widiati et al., 2023). It encompasses a wide range of techniques tailored to meet the unique learning needs of students who may require additional support due to cognitive, physical, emotional, or behavioral challenges. Special education pedagogy emphasizes individualized instruction, differentiated learning experiences, and the use of assistive technology and accommodations to ensure that all students have equal access to the curriculum and opportunities for academic success (Hunt et al.,

2012, 2020, 2022; Norwich & Lewis, 2007; Thompson, 2022; Zilz & Pang, 2021). By individualizing instruction and providing targeted support, special education pedagogy aims to empower students with disabilities to reach their full potential and thrive academically, socially, and emotionally (Thompson, 2022).

Though a prescribed pedagogy is not present in special education laws (EHA, 1975; IDEA, 2004), there is an emphasis on goals and teaching to help students to meet said goals. This entails the formulation of well-crafted goals and the provision of additional academic supports, such as speech and language therapy, as well as necessary accommodations and modifications. As such, there is an importance placed on well written goals EHA (1975) which would be housed within the student's IEP documentation. Goals, as outlined in the EHA, establish the expectation for educators to implement teaching strategies that facilitate students in making satisfactory progress towards their individual academic objectives. This necessitates the use of tailored pedagogical approaches, academic instruction tailored to each student's needs, and additional support measures such as accommodations and modifications (Hunt et al., 1992; 2012.) Moreover, these efforts should be undertaken within the framework of the least restrictive environment feasible. As such, goals serve as the cornerstone of IEP representing a tailored roadmap crafted to address the unique academic, social, emotional, or behavioral needs of each student (IDEA, 2004). These goals, formulated based on the student's individualized requirements, delineate specific areas for growth or improvement within the student's educational journey. Goals are seen as way to understand that a teacher's pedagogical practices are "working" and that the child is making progress toward goals via inform and formal data (Every Student Succeeds Act, 2015; IDEA, 2004; Ruble et al., 2018).

In the special education community, and arguably wider society, there is a collective belief that all students, regardless of disability, deserve personalized goals that cater to their individual needs and potential (Lipsky & Gartner, 1987). The development of educational goals is not just about academic achievement but also encompasses social, emotional, and life skills necessary for full participation in society. The goals reflect a more holistic view of education, acknowledging the diverse ways students learn and succeed Indeed, families of students with disabilities are legally mandated to participate in the development and assessment of goals to ensure that these objectives address the student's unique needs and incorporate insights beyond academic and school-based contexts (Childre & Chambers, 2005; Newman, 2004).

With the advent of EHA (1975) and bolstered by No Child Left Behind (NCLB) and IDEA in the early 2000s came the need to monitor special education programs, districts, and schools and the educational progress of students with disabilities. IEPs, and the ensuing paperwork, became one of the central ways to address progress monitoring and, in turn, to enforce the laws around academic achievement and access (Rotter, 2014). However, given the various components of an IEP (e.g., baselines on current academic and social performance, goals, services), writing a legally compliant IEP can be a difficult task, yet if not written correctly and adhered to then schools, districts, and teachers can face legal consequences (Yell & Drasgow, 2000, Yell et al., 2020). With these standards, each year, the schools and districts must provide evidence—often via IEP paperwork—that they are in compliance IDEA, or risk being sanctioned by their state's department of education (Kramarczuk Voulgarides et al., 2021).

Given the legal ramifications of low-quality or incomplete IEPs, special education administrators may stress the importance of compliance over pedagogy as the regulatory framework of the special education institution monitors, controls, and sanctions districts via these legal documents.

Siloing vs Cross-Functional Collaboration Quandary

Though well intentioned, the culminating effect special education legislation led to a fashioning of a special, but separate system of education for students with disabilities (Artiles & Bal, 2008; Jones, 2020; Mintrop & Zane, 2017; Petek, 2019; Taylor, 1988). Silos at the district level (e.g., separate budgets, curriculum, and leadership for special education) have been forged by the intuitional legal context of special education as special education experts (e.g., special education administrators) were needed to manage and govern the legal nature of special education and the resources that come with it (Borthwick, 2018).

Such balkanization, or siloing, often begins with the recognition of a particular group as being separate from the majority which is then followed by the creation of a separate governance system in an effort to accommodate the needs of the segregated group (Forness & Kavale, 1994). Though on the face it, balkanization could be viewed as positive as the created system is set forth to serve the segregated group—in this case students with disabilities—such siloing often leaves students at a disadvantage as they are not seen as students first but rather as disability categories and are left without needed resources which usually goes to serve the majority (e.g., students without disabilities; Forness & Kavale, 1994).

Such siloing and balkanization have occurred in districts as a response to the institutional demands. Such demands must be met in order for the school district as an organization to maintain legitimacy and survive; however, in meeting such demands they invite multiple conflicting demands and constraints (Rowan, 1982). As districts strive for legitimacy and stability, special education is often subjected to decoupling—where programs and groups operate independently and rarely make decisions collaboratively (Weick, 1976)—leading to the increased isolation and balkanization of special and general education at all levels of the system (e.g., special education leaders remain separate from general education leaders such the district superintendent, the curriculum coordinator; Darling-Hammond, 1997; Skrtic & McCall, 2010).

In an effort to deal with institutional demands and constraints, districts often maintain two decoupled systems: a) a formal structure that mirrors the rules, values, and norms of the institutional environment; and b) an informal structure that follows the tacit, technical demands and expectations of a group's profession within the system (Meyer & Rowan, 1977, 1978; Skrtic & McCall, 2010). As such, both districts and schools develop formal structures that are based on "myths, assortments of symbols, and ceremonies that have little to do with the way their work is actually done" (Skrtic & McCall, 2010; para. 17). This formal structure, along with the decoupled system, allows schools and districts to engage in their work in a way they see fit based on their localized judgement, but also structuring and organizing in a way that the institutional context expects thus protecting their legitimacy and stability (Meyer & Rowan, 1977; Skrtic & McCall, 2010).

However, this decoupling often leads to a shift in focus, where attention on the instructional core takes a backseat to the priority of maintaining the appearance of correct practices, especially within the special education administrative team (Meyer & Rowan, 1977, 1978; Skrtic & McCall, 2010; Weick, 1976). This suggests a possible trend where the actions of the special education administrative team lean more towards preserving certain symbols of their legitimacy rather than genuinely pursuing improvement (Meyer & Rowan, 1977; Skrtic & McCall, 2010). There's a noticeable lack of real implementation efforts, as long as discussions and decisions primarily aim to boost the organization's image.

Power vs Powerlessness

The quandary of power versus powerlessness stems from the siloing versus cross-collaboration dilemma outlined above. Power is characterized as influence, authority, and control, whereas powerlessness is defined as a lack of agency, autonomy, and influence (Dahl, 1957; Mintzberg, 1979). The power of special education administrators is derived from the regulatory framework of special education. The role of special education administrators, as described in the introduction, was born from the need to enforce compliance, and as such, their title and position imbue them with authority (Mayer, 1982; Prillaman & Richardson, 1985). If the regulatory frameworks were not in place, then it is likely that special education administrators would experience further marginalization, as general education administrators would dominate resources and decision-making, potentially neglecting the specific needs of special education. Here bureaucracy is a safeguard. Having a hierarchical structure and strict protocols and rules allows special education administrators to retain their power to ensure adherence to laws and regulations (Skipper, 2018; Weber, 1978).

Though the regulatory framework of special education empowers special education administrators to manage and enforce special education laws, it has also served to disempower them as they are isolated from general education due to siloing. With such siloing, special education is often treated as a separate entity (Skrtic, 1991; Skrtic & McCall, 2010). As such, special education administrators remain separate from their general education leader counterparts as good will between the groups is often worn out by compliance demands.

Unions

Teachers' unions also play a critical role in the power versus powerlessness quandary. Teachers' unions are organizations formed by teachers and other education professionals to advocate for their rights, interests, and working conditions (Strunk & Grissom, 2010; Kahlenberg, 2007) which are typically engrained in collective bargaining agreements—contracts that explicitly outline district policies, teacher compensation, hiring protocols, transfer procedures, performance evaluations, and mechanisms for addressing grievances (Cowen & Strunk, 2014; Strunk & Grissom, 2010). Notably, in their study of California unions and collective bargaining agreements, Strunk & Grissom (2010) surveyed school board members from 113 districts in California and examined collective bargaining agreements to better understand relationship between the strength of teachers' unions and the restrictiveness of such agreements in school districts. They found that districts where board members perceive unions as more powerful tend to have collective bargaining agreements that are more restrictive, limiting the flexibility of district administrators in policymaking, especially in areas like personnel transfers and teacher evaluations (Strunk & Grissom, 2010). In districts where unions hold significant sway via the collective bargaining agreements, such as many in California, administrators may find themselves in conflict with teachers when attempting to introduce changes or initiatives (Strunk & Grissom, 2010). Teachers may leverage union power to oppose or challenge these initiatives, potentially leading to their abandonment or prompting negotiations that could yield mutually beneficial outcomes for both teachers and administrators.

Bureaucracy vs Improvisation Quandary

According to Weber (1978), a bureaucracy is a formal organization that is designed to effectively accomplish organizational objectives through rationalized procedures and specialized roles. Bureaucracies are distinguished by hierarchical structure, division of labor, written rules and regulations, impersonality, and merit-based selection and promotion. In bureaucratic structures, such as special education, the delineation of authority and responsibility is fundamental, establishing a hierarchical framework that guides organizational operations

(Skipper, 2018; Weber, 1978). At each level of the hierarchy, offices hold distinct domains of influence, defining the scope within which they exercise delegated powers or agency, and this hierarchical arrangement ensures a clear chain of command, with directives flowing downward from higher-ranking authorities to subordinate offices (Weber, 1978). With special education, we often see this with practitioners (e.g., teachers, speech and language pathologists) being at the lower level, with special education middle managers (e.g., program specialists, content specialists) above them, then program and compliance coordinators (those people who oversee compliance items or classroom programming for the entire district), with the director of special education at the top of the hierarchy. Though this is the chain of command for special education, it is important to note that this is situated within a general education institutional context as well, and, as such, above the director of special education which may be underneath an assistant superintendent or superintendent of the district.

Additionally, in bureaucracies the authority vested in each office, which is reinforced by the hierarchy, comes with an obligation to adhere to organizational policies, directives, and missions as dictated by superiors (Skipper, 2018). This dynamic emphasizes that authority and obligation are inherent to the office itself, rather than individuals occupying those roles. Consequently, anyone assuming a particular office inherits its associated powers and duties, contributing to the stability and continuity of the organizational structure and each level has defined authority and responsibility (Grissom et al., 2015; Skipper, 2018; Weber, 1978). This dynamic is often maintained through strict policies to limit discretion or improvisation—having the capacity to adapt and make spontaneous decisions, prioritizing flexibility, creativity, and a willingness to take risks, enabling individuals or groups to respond swiftly to new challenges or opportunities without strict adherence to established protocols or procedures—ensure accountability, minimize the risk of arbitrary decisions or favoritism among bureaucrats, promoting uniformity in outcomes (Skipper, 2018; Weber, 1978).

Workload Overwhelm versus Task Accomplishment Quandary

With the passage of EHA (1975), IDEA (2004), and NCLB (2001) came new work expectations for special education teachers mainly in the form of additional paperwork (e.g., IEPs, caseload management). These new factors influenced not only the work conditions of special education teachers, but also their special education administrators as their administrators are held accountable for paperwork and the educational achievement of students with disabilities at both the district and federal level.

To hold schools accountable for the education of students with disabilities, EHA (1975) and IDEA (2004) created and added to a system of educational paperwork (e.g., IEPs) that special education teachers must comply with, or risk being audited or legal prosecution (see section above on compliance versus pedagogy quandary). The intent of such paperwork was to uphold the values expressed in EHA (1975) and IDEA (2004) by ensuring that students with disabilities received an equitable education as per FAPE. Though there was positive intent, myriad of studies over the past several decades have identified paperwork as a major contributor to workload overwhelm (Billingsley, 2004, Billingsley & Betinni, 2019; Billingsley et al., 1993; Brunsting et al., 2014; 1995; Morvant et al, 1995; Nance & Calabrese, 2009).

In several studies, special education teachers have cited that excessive paperwork impacted their teaching, namely that the paperwork felt overwhelming, needless, redundant, and intimidating (Billingsley et al., 1995). Often special education teachers felt that they did not have adequate time to complete necessary paperwork and faced mounting pressure to complete it. The Paperwork in Special Education Report (2002)—one of the largest studies on special education

paperwork to date—surveyed a nationally representative sample of administrators (n = 358) and service providers (n = 8,061), which included special and general education teachers, speech-language pathologists, and special education paraprofessionals. Findings from this report revealed that, on average, teacher spent five hours per week completing special education paperwork, which was the same amount of time they spent on lesson planning. These findings suggest that though the laws mentioned above were meant to improve the education of students with disabilities they may be, in fact, thwarting it as teachers sacrifice instructional time to special education paperwork.

Special Education Teacher Shortage versus Sufficient Basic Capacity

With overloaded work demands comes the need to prioritize the important aspects of one's job or risk burnout (Maslach, 2003). This prioritization leads to a quandary between what the law requires of special education teachers and what they can feasibly achieve in their workday. Namely, these quandaries manifest as compliance issues (see compliance vs pedagogy section above) and attrition as special education teachers experience burnout (Billingsley, 2004; Billingsley & Betinni, 2019; Billingsley et al., 1993; Billingsley et al., 1995; Darling-Hammond, 2012; Morvant et al, 1995). Problems with role overload and design, as created in part, by NCLB (2001), ESSA (2015), and IDEA (2004), have been strongly linked to special education teacher attrition (Billingsley, 2004; Billingsley & Betinni, 2019; Brownell et al., 1997; Brunsting et al., 2014; 1995; Mason-Williams et al., 2020; Morvant et al, 1995; Vittek, 2015). As special education teachers often feel more overwhelmed by additional work demands—such as state testing and IEP paperwork—the more likely they are to leave the field within the first five years of teaching (Darling-Hammond, 2012).

These quandaries come at a great cost for districts and special education administrators who often bear the brunt of legal battles when legal requirements are not met or special education teachers vacate their positions due to burnout leaving classrooms without qualified teachers and little instruction hampering students with disabilities' academic achievement (Darling-Hammon, 2012; Muller, 2009).

Adapting and Organizations

When it comes to the special education quandaries and the navigation of such quandaries amidst crisis, we must first understand how organizations and their leaders manage the demands of the crisis, form social cohesion during crisis to ensure organizational stability, and create new or adapt organizational structures that serve the needs of various stakeholders given that the old structures have been disrupted.

According to Schein (2010, 1999), organizational culture develops through the navigation of two key developmental challenges: managing external demands and fostering internal integration. Managing demands involves addressing tasks and problems to progress towards organizational goals, while internal integration entails fostering social cohesion and affirmation of group values, competence, and esteem to enable coordinated action (Forsyth, 2014; Rousseau et al., 2008; Sherman et al., 2007). These capabilities develop over time as groups 'learn' patterns of interaction that are effective (Schein, 2010), which can become habituated and shape the organization's response and adaptation to crises. Schein emphasizes the necessity for organizations to evolve in response to internal and external stimuli, such as crisis, to ensure continuity and growth. He asserts that adaptation is not merely reacting to changes but involves strategic anticipation and readiness for future shifts. This adaptive capacity is intrinsically tied to an organization's culture, encompassing collective beliefs, values, and practices. Schein highlights the crucial role of leadership in steering this adaptive process by exemplifying

behaviors, articulating values, and establishing clear expectations to those who interact with the organizations.

Furthermore, Integration is vital for aligning various organizational components with overarching goals and cultural values (Schein, 2010). This entails the establishment of communication channels, encouragement of cross-departmental cooperation, and cultivation of a unified understanding of organizational objectives and values to ensure organizational stability. Through integration, organizations ensure cohesive direction and enhanced capability to tackle complex challenges and problems that often arise during crisis. Such integration and adaption on behalf of the organization is needed to create structures, processes, and cultural practices that align to serve the needs of the clientele (Schein, 2010, 1999). This approach includes an in-depth comprehension of the client's perspective, ongoing engagement, and adaptability in services and operational practices based on client input.

The importance of organizational leadership becomes particularly evident during times of crisis when rapid adaptation, integration, and client-centric structures are essential (Schein, 2010). Crisis are punctuated by the rapid emergence of numerous and widespread problems, necessitating swift management and responses from organizational leaders to address a variety of issues across stakeholders (e.g., parents, students; Reyes-Guerra et al., 2021; Whitla, 2003). During such a chaotic time, organizational defensiveness may emerge, characterized by rigidity, strict adherence to existing protocols, suppression of dissent, and a tightening of hierarchy to centralize decision-making (Mellahi et al., 2002; Staw et al., 1981). In such situations, leaders play a crucial role in stabilizing the organization and providing direction. Weaknesses in leadership can leave the organization vulnerable and exacerbate the crisis—including having a lack of answers to problems. Studies on organizational failure consistently identify leadership breakdowns as a major contributing factor (Cameron et al., 1987, 1988). If leaders fail to effectively manage the crisis or if failure seems imminent, organizational members may perceive internal incompetence, resulting in leadership instability, reduced cohesion and increased dissent among the leadership team and pushback from outside stakeholders (Staw et al., 1981). It is during such times of crisis that organizational leaders, such as special education administrators, can rely on their problem-solving capabilities to keep the organization operational and maintain stability for those within the organization.

Problem Solving

Problem solving amidst crisis and the macro-institutional context of special education both serve to influence the micro-level interactions (e.g., communications) of those within the institution. Even when the institution is met with chaos and disruption, the institution and its urgencies still influence how the members within the institution organize and prioritize their work. Special education administrators constantly make decisions for their district, special education teachers, and students with disabilities as they navigate the fast-paced world of education generally and special education specifically. Problems are constant in their realm, and, as such, I examine how these administrators undertake problem-solving, particularly addressing both the emotional and cognitive dimensions, amidst complex conditions.

Problem Complexity

Funke et al. (2018) describe problem complexity as problems that are distinguished by multiple interconnected elements (i.e., variables, factors, entities, or any distinct parts that are interconnected within the problem space), intricate relationships among these elements, the accessibility and availability of pertinent information, dynamic system changes over time, and the presence of competing objectives. While a problem may exhibit complexity, it doesn't

necessarily imply that it is convoluted or ambiguous. As such, the literature on problem solving identifies two sets of problems: (a) those that are well defined or structured, and (b) those that are ill-defined or ill-structured (Jonassen, 2000; Pretz et al., 2003). Well-defined problems have clearly defined goals, solutions, and limitations (Jonassen, 2000; Mintrop & Zumpe, 2019; Pretz et al., 2003) whereas ill-defined problems often have unclear goals, unknown solutions, unclear limitations; and often stem from complexity and uncertainty (Jonassen, 2000; Mintrop & Zumpe, 2019; Pretz et al., 2003). The challenges facing district leaders, including special education administrators, span a wide spectrum, from specific incidents to systemic concerns (e.g., racism, ableism; Jonassen 1997, 2000; Mintrop & Zumpe; 2019, Pretz et al., 2003).

Educational leaders often grapple with challenges that are ambiguous and multifaceted, rather than straightforward and well-defined (Jonassen, 2000). These challenges tend to be intricate and necessitate adaptive approaches over routinized responses (Jonassen, 2000, Leithwood & Stager, 1989; Mumford & Connelly, 1991; Mumford et al., 2000; Zaccaro et al., 2000). As Mumford and Connelly (1991) articulated, leaders frequently confront unique issues that don't come with pre-existing, clear-cut solutions. The majority of issues that educational leaders encounter resist easy solutions due to their diverse interpretations, solution paths, and the absence of clear criteria regarding what counts as a good solution to fit the issue at hand (Jonassen, 2000; Mumford & Connelly, 1991; Sinnema et al., 2021). Rarely is there a singular definitive answer to any one issue, rather there are myriad potential solutions that can be tailored to specific circumstances. However, while there might not always be a clear 'right' or 'wrong', the implications of these problems weigh heavily on district administrators as they are often seen as the problem solvers of their districts by numerous stakeholders (e.g., parents, teachers, the school board; Bryk et al., 2015; Mintrop et al., forthcoming).

What is Problem Solving?

Problem solving, at its core, is about addressing situations by thinking through and crafting solutions given the circumstances (Jonassen, 2000). Within the realm of education, district leaders, which include special education administrators and central office directors, stand at the forefront of this endeavor (Bryke et al., 2015; Mintrop & Zumpe, 2017). Their roles are multifaceted, as they are not only seen as the captains steering the ship but also the architects redesigning it amidst a constantly evolving institutional landscape. These leaders grapple with a spectrum of challenges. They confront micro-level issues: addressing the unique needs of individual teachers, students, or principals, or responding to singular school dilemmas. Though these incidents can influence the educational experience of students, they tend to be simple problems that require simple solutions. Education leaders are also confronted with macro-level challenges such as racism, ableism, and evolving educational reforms, and teacher shortages, which influence the overarching educational landscape and typically pose more intricate problems to solve. The onus falls on district leaders to not only acknowledge these overarching problems but also to spearhead initiatives aimed at their solving them (Sinnema & Stoll, 2020; Sinnema et al., 2021). In an educational age characterized by rapid change, compounded by the pandemic, which demands accountability, the role of district leaders as adept problem solvers becomes more pivotal than ever (Bryk et al., 2015).

With the above in mind, an issue is considered a problem when two key features are present: a) a tension between what is and what ought to be (e.g., the quandaries); and b) the special education administrators feel they have the power and capacity to make a choice when it comes to solving the problem; meaning they feel that they can actually solve the problem —

whether a solution is derived or not. There are two important components that the problem-solving must contain: a) tension of what is and what ought to be and b) choice.

Tension of What is and What Ought To Be

For this dissertation, I draw from the work of Jonassen (2000), to define the *tension of what is and what ought to be.* According to Jonassen, problems consist of an "unknown entity in some situation" (p. 65). This "unknown entity" (p. 65) refers to the difference between *what is and what ought to be* or, in other words, a goal state versus the current state. Here, the desired state does not align with the current reality, indicating a discrepancy or a tension between the present situation and the desired outcome. Alongside the identification of a tension between what is and what ought to be, the problem solving around and the solution for the unknown entity must have "some social, cultural, or intellectual value" (p. 65). In other words, problems consist of a tension between what is and what ought to be and such tensions must be worth exploring as determined by the group who is affected by the tension. If the group does not see the tension or does not find the tension valid—whether it is or not to an outside observer—then there is no need to problem solve.

Choice, Power, and Capacity

Choice refers to possible choices within the solution space (Tallman & Gray, 1990). If there is only one choice or no choice at all regarding the solutions, then there is no need to problem solve as the answer is evident or not present and is therefore unsolvable. With this understanding, what constitutes a choice has three distinct dimensions. According to Tallman & Gray (1990), first, for there to be a choice, the group must have opportunity to refrain from taking action. In other words, for choice to exist, problem solvers have the freedom to either undertake a possible course of action or not. Second, problem solvers often make choices that are directly relevant to their values and well-being with the hope that these values will be reflected in the desired result. Third, though the action undertaken has a desired outcome, problem solvers cannot be certain of the consequences of their choice. Given that problem solvers interact with a probabilistic world, their choices "represent guesses that a given course of action (or nonaction) will produce a given result (p. 406)."

The ability to make choices depends on both capability and power (Conger & Kanungo, 1988; Deci & Ryan, 2000). Problem-solving teams, like organizational leaders, must feel empowered to address solutions and have the capability or belief that a resolution is attainable (Conger & Kanungo, 1988; Deci & Ryan, 2000). Once the team recognizes their ability to address issues and the capacity to achieve solutions, they can then choose to engage in problem-solving activities (Conger & Kanungo, 1988; Deci & Ryan, 2000).

With a tension of what is and what ought to be identified (Jonassen, 2000) and a choice noted either tacitly or explicitly (Conger & Kanungo, 1988; Deci & Ryan, 2000; Tallman & Gray, 1990), then those in charge with problem solving can begin to undertake the cognitive and emotional dimensions of problem solving. In the subsequent sections, I detail the micro-level communications of the team which entail the cognitive processes that occur during problem solving and emotional and group dynamics within the team.

Cognitive Side of Problem Solving

Based on the problem-solving literature (see Bryk et al., 2015, Coburn et al., 2009; Conklin; 2006; Deshpande et al., 2005; Deming, 1986, 1994; Jonassen 1997, 2000; Kahneman, 2011; Mintrop & Zumpe; 2019, Pretz et al., 2003), I define the cognitive processes of problem-solving broadly. Problem-solving can take place at different levels of complexity, but with any problem, the problem-solving team first develops a working 'theory' or an idea of how to get

from Point A (what is) to Point B (what ought to be; Jonassen 1997, 2000). At this point, the team comes to an agreement on what they think are the causes of the problem to understand it and reach a solution (Conklin; 2006; Deshpande et al., 2005). Once the throughline is established and the team agrees to the causes, the team comes to a consensus on a solution, how that solution will work once implemented, how the solution will change existing practices, and what learning is needed to change the practices of those targeted for the solution (Deming, 1986, 1994). With this in mind, the problem solving team then has to think about how the solution will motivate people the solution is designed for to change their practice and do these people have the time and capacity to institute the reached solution and what is the feasibility of the solution (Kimbell & Street, 2009). Along with this process comes the use of evidence (e.g., numerical data, anecdotes, interviews) at two phases. First, the team uses evidence to understand the problem they see before them and then after the solution has been implemented, they use evidence to identify if the solution is working or not (Burch, 2007; Honig & Copland, 2008).

While many problems faced by special education administrators can be addressed swiftly and intuitively through heuristic methods (Kahneman, 2011), more intricate issues often demand a deeper level of analysis (Bryk et al., 2015; LeMahieu et al., 2017). However, a paradox arises in situations where complexity is heightened, particularly amidst chaos: problem-solving becomes primarily action-oriented, with minimal consideration given to foresight as described in the process above (Mintrop & Zumpe, 2017).

Emotional Side of Problem Solving

When faced with ill-structured problems—especially those raised during a crisis—it can lead to defensiveness (Anagnostopoulos, 2006; Deci & Ryan, 2000; Vansteenkiste & Ryan, 2013) and instability for organizational leaders if they fail to effectively manage the crisis or feel failure is imminent (Staw et al., 1981). This can lead to coping strategies to help the members of the organization to manage negative feelings associated with possible failure or lack on control over the crisis or problem (e.g., lament, negativity; Bilney & Pillay, 2015; Hart, 1994; Ng et al., 2006; Taylor & Stanton, 2007). However, organizational leaders may engage in more proactive strategies during problem solving to help them navigate problems during crisis (Bilney & Pillay, 2015; Ng et al., 2006; Taylor & Stanton, 2007).

Coping

When coping with constant and ill-defined problems, organizational leaders often face the challenge of managing, reducing, or tolerating the stress associated with such situations (Bilney & Pillay, 2015; Ng et al., 2006; Taylor & Stanton, 2007). Yet, when confronted with complex problems, teams may find themselves dwelling on negative aspects, potentially leading to heightened emotional urgency and sharpened problem-solving focus (Bushe, 1998; Green & Haines, 2015; Mintrop et al., forthcoming). Yet, this focus on the negative can also foster feelings of helplessness, particularly after repeated or perceived failures, hindering proactive problem-solving approaches (Abramson et al., 1978; Ashforth, 1990; Ashforth & Lee, 1990; Seligman, 1972, 1975).

Moreover, in crisis situations, organizational leaders may resort to attributing problems to external factors rather than internal issues, deflecting responsibility and impeding authentic problem resolution (Taylor & Stanton, 2007; Weiner, 1986). This defensive stance can hinder internal improvement efforts, leading to demoralization and reduced morale, motivation, and engagement among team members (Santoro, 2011, 2021). Consequently, such feelings of demoralization can undermine organizational leaders' efficacy in problem-solving, leaving them feeling disconnected from meaningful contributions.

Proactive Strategies

Though some amount of coping is expected especially amidst turbulence and chaos brought by crisis, organizational leaders also engage in proactive strategies to build resiliency during uncertainty (Kozlowski & Ilgen, 2006). When problem solving, organizational leaders may focus on the strengths of their team, rather than solely on problems. Here, teams can leverage the inherent positive attributes and resources within team and the organization to move the needle on their problems (Bushe, 1998; Green & Haines, 2015). This approach fosters team morale encouraging active participation as team members engage in problem-solving discussion through questioning, voicing opinions, sharing perspectives, and freely expressing ideas in search of understanding problems and reaching solutions (Bakker, 2011; Bakker & Demerouti, 2008; Fang et al., 2010).

In addition to fostering a positive problem-solving environment, team members may experience a heightened sense of empowerment, perceiving themselves as having access to the requisite resources, authority, and support systems to bolster their problem-solving skills and tackle challenges effectively (Argyris, 1998; Vogt & Murrell, 1990). This empowerment can cultivate feelings of ownership and accountability, resulting in the generation of innovative solutions and the enhancement of team dynamics. Consequently, it promotes a proactive and engaged approach to problem-solving (Argyris, 1998; Vogt & Murrell, 1990).

Group Interactions

Within the bureaucratic framework described earlier, the problem-solving efforts of special education administrators are inherently influenced by the hierarchical structure characterizing team interactions (Hannaway, 1985; Weber, 1978). While this structure aids in task organization and role definition, it may hinder open communication and collaboration, impacting the problem-solving process adversely (Hannaway, 1985). To understand these interaction patterns, insights from both educational and industry literature on team dynamics, leadership, and hierarchical organizations are drawn upon.

In hierarchical systems, such as education, controlled delegation practices involve the systematic assignment of tasks by top management while maintaining ultimate oversight (Diego et al., 2015; Malone, 2015). This approach aims to align individual roles with organizational objectives, facilitating task execution. However, it may result in subordinates being excluded from problem-solving endeavors as top management retains control over detailing specific tasks and directives rather than seeking their input. This exclusion could curtail subordinates' autonomy, potentially leading to reduced motivation and creativity, as employees may feel disconnected from their tasks and overly reliant on top-down directives (Schermerhorn et al., 2011; Yukl et al., 2019). Along with controlled delegation of tasks comes directed communication. Here, the top management communicates directives to subordinates who are expected to carry forth said directives (Skipper, 2018). The purpose of this is to ensure that all team members receive and adhere to directives uniformly from higher authorities, rather than allowing individual interpretation that might result in customized approaches better suited to clients but could also be inconsistent or haphazard (Lussier & Achua, 2022; Skipper, 2018). These actions by the top management tends to concentrate authority at the upper levels of the hierarchy, which streamlines problem-solving and decision-making (Pearce & Conger, 2003; Yukl et al., 2019). While beneficial for swift responses and unified direction, centralized decision-making can marginalize the insights and input from lower-level employees, potentially leading to a disconnect from practical, on-ground realities (Schermerhorn et al., 2011; Mintrom, 2015). Alternatively, the team could collaborate to achieve common objectives (Hackman &

Wageman, 2005; Northouse, 2021). Here the team would engage in a cooperative, collaborative effort as they work toward a common goal (Hackman & Wageman, 2005; Northouse, 2021). Collaboration often entails individuals working together, often across different levels of authority, to achieve common goals or objectives. It involves sharing information, resources, and expertise, as well as coordinating efforts to accomplish tasks or solve problems effectively (Hackman & Wageman, 2005; Northouse, 2021; Lussier & Achua, 2022; Schermerhorn et al., 2011).

Three Scenarios

In the face of an institutional crisis rife with complex quandaries, special education administrators are confronted with the formidable challenge of navigating overwhelming problems and uncertainties. Expected to provide solutions, these administrators are thrust into the dual tasks defined by Schein's organizational culture theory: adapting to unprecedented challenges while simultaneously securing collective legitimacy. Within this critical juncture, their responses to the crisis can unfold in varied ways, leading to a spectrum of outcomes. Drawing from the literature, I theorize three potential scenarios to explain the distinct paths these administrators might take in their roles as problem solvers, tackling issues that range from the straightforward to the multifaceted.

Scenario 1: Overwhelming Chaos

In this scenario, special education administrators are engulfed by chaos that the crisis brings. The crisis at hand renders all established heuristic frameworks for understanding and solving problems ineffective. As a result, the problems are attributed solely to the uncontrollable crisis, leading to a complete cessation of problem-solving efforts. The prevailing sentiment among the administrators is one of powerlessness, resulting in a passive 'wait-and-see' approach. This inactivity is underpinned by a profound sense of helplessness, leaving the organization stagnant and unable to respond effectively to the unfolding situation.

Scenario 2: Adaptive Response to Crisis

The unfolding crisis catalyzes significant changes within the organization, unsettling old certainties and prompting a shift towards proactive attitudes. Administrators and staff adopt rapid heuristic problem-solving methods in response to the dynamic situation. However, the focus is selectively placed on a few critical challenges, potentially casting old problems in a new light. This leads to experimentation with novel arrangements and solutions, such as distributed expertise, an increased focus on pedagogy and classroom dynamics, improvisational tactics, and the establishment of new political relationships. The overarching mood is positive, characterized by a 'can-do' attitude, reflecting an organizational culture that is responsive, adaptable, and open to innovation in the face of crisis.

Scenario 3: Institutional Inertia

In this scenario, the crisis is either ignored or minimized, with the organization clinging to old certainties and established routines. This inertia is underpinned by the institution's enduring power structure, making such a response unsurprising yet problematic. The organization continues to grapple with traditional quandaries, maintaining usual practices such as strict hierarchies, compliance with outdated procedures, and excessive paperwork. Problem-solving efforts are superficial, focusing on "old" issues that are misaligned with the current context. These efforts often resort to outdated heuristics, such as relying on past experiences or traditional methods, without genuinely addressing the new challenges. This approach provides a false sense of legitimacy to the team but ultimately leads to inefficiency and a lack of meaningful progress. The resultant organizational culture is characterized by frustration, a rush to inadequate

solutions, and eventual demoralization, leading to a high turnover as individuals leave the institution.

Summary of Theory

Given the pivotal role of special education administrators in addressing challenges within their districts, it becomes essential to understand their problem-solving approaches (Bettini et al., 2017). This analysis should consider the influence of the special education institution context (Scott, 2013; Skrtic, 1991) on their problem-solving processes, particularly at the micro-communication level—group interactions (Hackman & Wageman, 2005; Lussier & Achua, 2022; Skipper, 2018), emotional responses (Argyris, 1998; Taylor & Stanton, 2007; Vogt & Murrell, 1990; Weiner, 1986), and cognitive processes (Bryk et al., 2015, Coburn et al., 2009; Conklin; 2006; Deshpande et al., 2005; Deming, 1986, 1994; Jonassen 1997, 2000; Kahneman, 2011; Mintrop & Zumpe; 2019, Pretz et al., 2003) integral to problem-solving. The complexity of these macro and micro-level processes is further amplified by the COVID-19 crisis, which called for an unprecedented level of adaptability from administrators. In this context, I posit that an in-depth exploration into how special education administrators handle problem-solving during such crises is crucial.

The six underlying quandaries—namely, the tension between pedagogy and compliance, the contrast between siloed operations and cross-functional collaboration, the dynamics of power and powerlessness, the balance between bureaucracy and improvisation, the struggle between workload overwhelm and task achievement, and the challenge of addressing special education teacher shortages while ensuring adequate capacity—are inherent to the fabric of the special education institution (Farazmand, 2003; North, 1990; Ostrom, 2015; Scott, 2013). These quandaries are typically navigated as part of the daily lives of those in the organization, maintaining a status quo during stable periods (Scott, 2005; 2013). However, in times of crisis, these issues become increasingly pronounced, transforming into critical pressure points that can potentially destabilize the very foundation of the special education institution (Farazmand, 2003; North, 1990; Ostrom, 2015; Scott, 2013). Consequently, when faced with crisis, these six quandaries come to the fore, calling on special education administrators to make tough choices to possibly deprioritize the needs of in the institution for those of stakeholders (e.g., students with disabilities, teachers). Yet, the team may lean in more heavily into the needs and priorities of the institution as a way to maintain stability and their own legitimacy amidst the storm of the crisis (Rowan, 1982; Weick, 1978). Either is a possibility and both call for special education administrators to problem solve issues that evolve from the quandaries. The path they choose affects the team's adaption and response to the crisis.

In the first path, the special education administrative team may favor a more client-centered or, in the case of schools, teacher or student-centered approach where the administrators develop or adapt structures to better serve the new needs of students that arose from the crisis (e.g., helping students to adapt to remote learning during the pandemic; Schein, 2010; 1999). On the other hand, special education administrative teams may adapt to the crisis by clinging to institutional norms (Farazmand, 2003; North, 1990; Ostrom, 2015). This could cause special education administrative teams to fall into problem solving that may look like the "old" way of doing things to provide stability for themselves. Such as, prioritizing hierarchal and bureaucratic structures to maintain consistency for the district rather than flattening the hierarchy to allow middle managers to improvise and tailor responses to problems to individual school sites based on that site's needs (Skipper, 2018; Weber, 1978). Such uniformity could serve students' needs but it may be more focused on serving the needs of the institution and the administrators in it.

Given the macro-institutional quandaries of special education and the response to crisis (e.g., adaptation, integration, and structures based on client need), problem solving for special education administrative teams during such times is multifaceted (Jonassen 1997, 2000). Whether problems have ultimately a simple solution where fast or heuristic thinking serves the team to arrive at solutions quickly or if the problem is more complex resisting simple solutions calling for more analytical thinking largely depends on the situation, but often during crisis problem solving teams are faced with complex, ill-defined problems (Jonassen 1997, 2000; Kahneman, 2011). When faced with complex problem more slow, analytical thinking may be needed (Kahneman, 2011). However, crisis and the urgencies of problems calls for special education administrators to rush to solutions and become more action oriented to quickly solve problems which could mean that solutions reached may not fully answer the problems at hand (Kahneman, 2011).

Special education administrators, in particular, handle problems that impact some of the most marginalized students in education. Consequently, their emotional responses to these problems may be heightened as they strive to meet the diverse needs of students with disabilities in their district. Here, special education administrative teams may cope with problems by lamenting them or externalizing them to other actors leading to feelings of demoralization and helplessness as the team may feel they have little control over their problems (Bilney & Pillay, 2015; Hart, 1994; Ng et al., 2006; Taylor & Stanton, 2007; Santoro, 2011, 2021). However, special education administrative teams could take a more proactive stance where they focus on the strengths and abilities of their team to foster positivity and momentum to solve problems (Argyris, 1998; Kozlowski & Ilgen, 2006; Vogt & Murrell, 1990). Of course, these emotions are also based on team interactions as the group works to problem solve. In hierarchical institutions, team problem-solving processes may be controlled by top management, who dictate the discussions and tasks, and then assign solutions and tasks to subordinates for execution (Diego et al., 2015; Malone, 2015; Schermerhorn et al., 2011; Skipper, 2018; Mintrom, 2015). However, if there is a more collaborate approach where the hierarchy is flattened, and subordinates can share their experiences working with those on the ground (Hackman & Wageman, 2005; Northouse, 2021; Lussier & Achua, 2022). Both options are needed during a crisis as answers are needed swiftly, but the answers also need to reflect the needs of the clients (e.g., teachers and students with disabilities).

Based on the literature detailed above, I theorize that problem solving for a special education administrative team crisis may undertake problem solving in one of three ways—being overwhelmed by chaos, adaptive response to crisis, and institutional inertia. The three scenarios, theorized above, are only broad possibilities and each scenario is possible as they are contingent on the situation at hand.

With the theoretical framework in mind, this study examines the problem-solving patterns of two main groups: (a) The special education director and two special education coordinators (compliance coordinator and programs coordinator); and (b) the special education director, the coordinators, plus six program specialists—a group of administrators who support schools directly and serve as the go-betweens between the district's special education teachers and the special education director and the coordinators. By examining the weekly meetings and the longer problem-solving episodes that pop up during such meetings, I hope to better understand the following research questions:

1. How does the micro-communication level—specifically the cognitive and emotional processing factors—influence the director/coordinators team and the program

specialists' team as they undertake problem-solving and how are these processes reflected in their weekly meeting interactions?
2. How do the macro-institutional structures and situated organizational forces within the special education context impact micro-communication and problem-solving efforts among these special education administrative teams?
3. How do the special education administrative teams process and contend with the Covid-19 pandemic during problem solving sessions, their weekly meetings, and in their daily work as revealed by observation of weekly team meetings, formal interviews, and reflective conversations?

CHAPTER 3: RESEARCH DESIGN AND METHODS

This study aims to investigate the problem-solving processes employed by special education administrators in ABC school district to address complex problems—including the emotional aspect of problem-solving (e.g., coping with problems or team development), the special education's context influence on their teams' problem-solving, and finally, how the teams cognitively tackled the problems they faced. As detailed in the theoretical framework of this dissertation, the macro-institutional level of the special education context is characterized by quandaries between compliance versus pedagogy, siloization versus cross-functional collaboration between special and general education, bureaucracy versus improvisation, workload overload versus tasks accomplishment, and the special education shortage versus sufficient basic capacity. Such quandaries shape the problems which are present at the district and school levels and often dictate the type of problems that are targeted for problem-solving by the special education administrative teams.

Additionally, situated within the macro-institutional special education context, the administrative teams at the center of this study must also engage in both the emotional and cognitive aspects of problem-solving. The emotional aspects encompass both positive coping strategies, such as feeling energized, whereas the negative coping strategies may entail externalizing or lamenting the issues, blaming the problem on other groups, or even fanaticizing about an ideal scenario as if the problem doesn't exist. This emotional dimension also includes a hierarchical problem-solving process, wherein the department head dictates solutions to lower-level managers who are tasked with implementation (Lipsky, 2010; Mintrop & Charles, 2017). Lastly, the cognitive aspect of problem-solving, which I define broadly, is based in the literature, as (1) participants must tackle an issue with sufficient information initially to fully understand its nature, (2) they must collectively establish a clear understanding of the specific behavior they aim to alter, (3) they should explore the underlying causes of the issue or behavior, (4) clear decisions and actionable items should be formulated, (5) solutions or remedies should be chosen or organized in a manner that resonates with end users, encouraging their willingness to change and facilitating implementation within a reasonable timeframe, and (6) evidence must be accessible to assess the effectiveness of the remedy, allowing for adjustments or revisions as needed to define, frame, and structure problems (Bryk et al., 2015). This cognitive dimension enables the team to evaluate potential solutions, understand the systems influencing outcomes, and consider the solutions implemented by the learners (Mintrop, forthcoming).

Methodology: Participant Observation

To answer these research questions, I used participant observation to study two special education administrative teams: the special education director, coordinators, and the program specialists, in one northern California district over the 2020-2021 school year. Participant observation calls for immersion among research participants in everyday context to develop a

deep understanding of their routines, rituals, and culture (Brannan & Oultram, 2012; DeWalt & DeWalt, 2011; Schensul & LeCompte, 2013). Participant observation as a methodology involves the researcher participating in the same events as the participants, as well as observation, documentation, and analysis of those events. Two key aspects of this research warrant attention: 1) The study was conducted during a year marked by remote teaching and meetings in response to the COVID-19 pandemic. Consequently, the "everyday context" involved participating in Zoom meetings (version 5.4.1, Yuan, 2020) alongside the research participants rather than in face-to-face interactions; 2) Observing and interacting with participants in this manner precluded direct observation of their daily activities, such as visiting school sites, responding to emails, or managing individual projects.

There are several reasons that participant observation is particularly well suited to investigating the problem-solving patterns of special education administrators. For one, participant observation allows for flexibility when studying various aspects of a group's behaviors that are not well-established in the literature, as is the case for special education administrators' problem-solving and their interaction dynamics when tackling problems. Secondly, engaging alongside the group members in their everyday interactions affords me, as the researcher, insight into both explicit and tacit knowledge that shapes members' behavior (Brannan & Oultram, 2012). Participant observations offers the opportunity to study the interactional patterns, knowledge, and actions of the participants within an organizational culture (Martin, 2002). To understand an organization's members, one must engage and share in the same experiences and activities (Schein, 2010). Such engagement allows the researcher to understand the collective behaviors that have become established and habituated within an organization's culture (Schein, 2010). Such behaviors can be so engrained in an organization that often even members of the organization may not be aware of such patterns nor the reasons for them (Schein, 2010). Examining how people interact with each other alongside the habits, routines, and rituals they engage in within their everyday context (Schein, 2010) can reveal how the teams communicate with each other and how the context in which they operate (i.e., special education) influences the teams' actions. Ultimately, participant observation as a methodology provides the researcher with a deeper understanding of the real-world behavior of professionals within their organizations.

Yet, being able to observe and gain access to real-world processes of groups within education is difficult, particularly in those educational spaces which are under threat, as are many administrative teams. Members of such groups may view the motives of the researcher and the research as suspect, as the group does not want to be seen as incompetent or incapable. As such, many groups may be reluctant to welcome a researcher into their space to document their struggles, thinking, and behaviors. According to Cameron et al. (1988), this reluctance is due to the lack of trust on the part of possible research participants. However, participant observation might help with the issues of trust, as the researcher must build relationships with the research participants, share in team experiences, and understand their perspectives (Schensul & LeCompte, 2013). For these reasons, I employed participant observation as a method of examining the problem-solving techniques of the special education administrative teams (Schensul & LeCompte, 2013). Despite the virtual nature of their "everyday context" as mediated by Zoom, my approach allowed for an exploration of their daily challenges, observation of interaction patterns, and identification of factors impacting their problem-solving processes to be clearly delineated.

Dual Research Roles

For participant observations, one must take on two distinct roles as both an insider and an outsider, while maintaining sufficient distance to ensure impartial analysis. This requires the researcher to become an insider by actively engaging in the everyday activities of the research participants, dedicating significant time in the research context, and establishing a bond of trust and rapport with the participants (Vivyan, 2021). In the context of this research, I became an "insider" by attending all weekly director/coordinators meetings, program specialists' meetings, other relevant meetings on professional development and teacher training, and meetings to which I was invited, such as school-site special education department meetings led by program specialists. In addition to attending such meetings, I also engaged in formal interviews and informal reflective conversations with all nine participants in this study (see below for more information on participants and hours spent conducting research). Though I spent considerable time with the participants during their weekly meetings to build trust and gain access to the group, I also had to remain an impartial outsider to perceive patterns and draw inferences that may not have been apparent to insiders. To remain impartial, I maintained data logs and field journals, recording my thoughts and reactions. During team discussions, I endeavored to remain as neutral as possible, offering my expertise and opinions only when prompted by participants, and even then, doing so only after they had shared their own thoughts. This approach was aimed at minimizing my influence on the group's processes, reactions, and thoughts. In the following sections, I will elaborate on how I navigated the dual roles of a "participant observer."

Another challenge faced in participant observation is that the researcher assumes the role of the research instrument (Brannan & Oultram, 2012; Spradley, 1980), capturing data through their five senses and bodily experiences while participating alongside research subjects in their everyday context. As the research instrument, the researcher's own positionality and subjectivities (Schensul & LeCompte, 2013), background knowledge (Sánchez-Jankowski, 2002), and social skills can influence the quality and extent of the data collected, as well as the inferences from which it is drawn. Researchers' unique subjectivities may introduce bias, while limitations in their knowledge or access to participants' implicit or contextual knowledge can result in flawed interpretations of a group's behavior (Schensul & LeCompte, 2013). To achieve a more accurate and valid understanding of group behavior, researchers need to complement their observations with other sources of data. To address this issue, the study incorporated formal interview sessions and one-to-one reflective conversations with individual members from both the director/coordinator's team and the program specialist's team to gather members' perspectives, explanations, and interpretations of the events under study (Feldman, 1999; Schensul & LeCompte, 2013).

Formal interviews and reflective conversations played a critical role in providing insight into factors that could influence group interactions during problem-solving events but were not readily observable during group meetings. Group interactions are not isolated events and are shaped by broader organizational and instructional contexts, which can include planning efforts, decisions, or actions of other groups, or communication that occurs before or after meetings (Hackman et al., 2000). Furthermore, in meetings, what is left unsaid among group members and the25easonns behind it can be as significant as what is said (Argyris, 1985). By engaging in formal interviews and reflective conversations with individual group members, I gained an understanding of how different members perceived and interpreted the groups' situation. This enabled the identification of shared and differing perspectives that may not have been explicitly expressed but could contribute to underlying dynamics and tensions within the group. Further

details about the structure and content of the formal interviews and reflective conversations are provided later in the section on methods and data.

Study Context

This study was conducted in a northern California school district, ABC unified district, a pseudonym, where I was involved in a research-practice partnership (RPP). These RPPs are characterized by long-term collaborations between educators, district personnel (e.g., district administrators such as the superintendent), and researchers to achieve mutualistic goals (Coburn & Penuel, 2016; Coburn et al., 2013; Penuel & Gallagher, 2017). In this RPP, which was in its sixth year at the time of this study, the research team—consisting of the principal investigator, a professor at UC, Berkeley, and two graduate researchers including me—collaborated with district administrators, principals, coaches, and teacher leaders to design professional learning artifacts and routines aimed at improving students' academic engagement. In the second year of the research, the RPP shifted focus to continuous improvement where district administrators engaged in continuous improvement cycles (Bryk, 2015)—recurring inquiry cycles regarding issues or problems faced by educators and educational leaders that use data to measure outcomes—to problem-solve internally felt needs and urgencies.

This study took place with the special education administrators in ABC Unified, with whom I began working closely in the fall of 2020 via the RPP. To initiate my collaboration with the special education administrative teams, I contacted Gem (a pseudonym, as are all names in this study), who served as the special education compliance coordinator. This interaction occurred during a continuous improvement meeting, which the research team was facilitating for the district superintendent and other high-level administrators, including the assistant superintendent and director of curriculum and instruction. Gem joined these other district personnel for the first time in November of 2010 in an effort to establish a deeper working relationship between special and general education administrators; however, Gem ended up leaving this group in January of 2020.

After getting to know Gem over several meetings, I spoke with her about joining meetings with her and the other special education administrators—the special education director, the program coordinator and six program specialists—to gain a better understanding of their work and to see if learning more about continuous improvement and problem-solving would be of interest to them. Gem enthusiastically accepted as she was interested in completing her own dissertation in educational leadership and believed that, collectively, our work could move the special education department toward a more positive direction. These initial plans were suspended when the pandemic forced ABC district to close schools in the middle of March of 2020. In October of that year, I reached out to Gem again to see how I could support the special education administrative team during this unprecedented time. Gem connected me with the special education director, Paula, to discuss how I could be of service. Although I offered to assist the team with continuous improvement cycles, Paula decided to forego such formalities due to the difficulties she and her team were facing and the unpredictability of the pandemic. Instead, she requested that I help the special education administrators with their problem-solving on an informal basis with the expectation that I would provide them with continuous improvement training when the district reopened the following school year. Unfortunately, due to several factors, including the departure of more than half of the special education administrators at the end of the 2020-2021 academic year, this plan never materialized.

The research began with Paula inviting me to the weekly director/coordinator meetings starting in November of 2020. After two months, starting in January 2021, Paula invited me to

join the program specialists' meetings to serve as a "critical friend," and to consult the teams as they solved district and school problems related to special education. Prior to my joining the program specialists' meetings, during the fall of 2019, Gem and I set up meetings with each participant to discuss how I might work with the team to support their research. After these initial meetings, in December of 2019, I held a one-on-one interview with seven of the nine participants—two program specialists, Aiyanna and Rose, declined to be formally interviewed for this study—to better understand their perspectives regarding the work they undertook and what they felt should be the focus of my work with them. The one-on-one interviews and the initial meetings with the participants, facilitated by Gem, enabled me to build trust and establish rapport with the special education administrators. This also set the stage for me to gain unfettered access to meetings. It was only necessary for me to leave the meetings twice due to the confidentiality of the topics. All materials and documents used during the meetings were shared with me, often without my requesting them, as I was routinely included in email CCs or added to Google docs simultaneously with other participants. Even though I consciously imposed limits on my own participation, so as not to unwittingly interfere or influence participants, I became a listening ear for many of the participants. All of these steps, combined with unfettered access to the director/coordinators meetings and the program specialists meetings, allowed me to assume the dual roles of "outsider," with presumed impartiality, and "insider," who understands the challenges faced by this team.

The District Context

To understand special education administrators' problem-solving techniques, it would be helpful for research to take place in a district which similarly faces adversity and crises to ensure that the findings are more generally applicable. These issues often include inadequate resources, such as under-resourced schools (Darling-Hammond, 2012; Milner & Lomotey, 2014) with substandard facilities and outdated resources such as textbooks and technology (Welsh & Swain, 2020), as well as significant educational debt (Ladson-Billings, 2006). Urban districts also face challenges in attracting and retaining high-quality teachers and school leaders (Chou & Tozer, 2008; Kincheloe, 2010; Milner, 2006), and are often characterized by economic hardship, concentrated poverty, and inequality (Breault & Allen, 2008; Darling-Hammond, 2014; Kincheloe, 2010). As such, schools in urban districts are shaped by social and economic factors, such as poverty levels, racial and ethnic demographics, poor achievement scores, poorly maintained facilities, and teacher quality (Darling-Hammond, 2014; Welsh & Swain, 2020). With the work of the RPP underway and considering that ABC school district faced challenges similar to other school districts under crisis, working with the special education administrators in this context would serve to make the findings more generalizable to other special education administrators facing similar challenges.

ABC school district is located in a large U.S. metropolitan area, primarily serving immigrants and low-income students of color. During the time of this study, the district had 30 schools, and approximately 20,000 students and 950 teachers. Of the 20,000 students, 2,544 students are enrolled in special education (California Department of Education, 2023). Although located in a highly diverse suburb, ABC school district exhibits the typical conflict and upheaval that is typically associated with "urban" school districts, as described in the literature (Welsh & Swain, 2020). In addition to serving a student population identified by the literature as being "disadvantaged" (Welsh & Swain, 2020), the special education administrators faced challenges from a school board that reflected the district's demographic makeup but was often divided and prone to meddling in administrative decisions.

Additionally, the teacher's union in the ABC district wielded significant influence, as they reviewed and approved all matters related to curriculum, instruction, personnel selection, and working hours that impacted teacher involvement in district initiatives and role definitions. Despite efforts to foster collaboration among various district departments, such as student services and special education, which were housed in different departments within the district, special education frequently faced ongoing criticism from other administrative teams due to noncompliance with legal regulations, low graduation rates for students with disabilities, and what district leaders considered subpar classroom teaching. Consequently, the special education administrators felt threatened when district leaders (e.g., assistant superintendent; associate superintendent of student and family services) considered reducing the special education administration teams' resources, including the possibility of eliminating program specialist positions. Given this profile, ABC school district exemplified a typical urban school district and was well suited to the research undertaken in this study.

Participants

Nine special education administrators participated in this study—Paula, the director of special education, overseeing the entirety of the special education for the district including the administration of special education programs and ensuring compliance; Gem the compliance coordinator, ensuring that the district was in legal compliance in accordance to all federal and state laws; Alma, the programs coordinator, overseeing the educational and academic programs for students with disabilities within the district; and six program specialists, Rose, Aiyanna, Armando, Blair, Steven, and Sandy, who act as liaisons between the directors and coordinators and teachers and schools. Paula, the special education director, had been in special education since the "early 90s" and served as a special education teacher for students with mild disabilities, and as a program specialist in other districts and states prior to coming to ABC school district. At the time of this study, Paula had been the special education director for four years and had not served in any other capacity within ABC school district prior to her taking on the role of special education director. Gem, as the compliance coordinator for the district, handled anything related to IEP documentation, federal or state-level audits, policies governing IEPs, and any legal matters for ABC school district. Gem was a former special education teacher for students with mild disabilities and worked as a program specialist prior to joining ABC school district. She was in her second year as the compliance coordinator when the research began. Alma, the programs coordinator, was responsible for managing the special education programs (e.g., classrooms, academics) within the district. She had served as a special education teacher for students with mild to moderate disabilities and those with extensive support needs in other school districts. In ABC school district, she was in her third year as the program coordinator having previously been a program specialist.

Of the six program specialists, three of them worked with the K-12 public schools in the district—Steven, Armando, and Blair. Steven was the program specialist assigned to work with all the special educations programs—including programs designed for students with mild disabilities to those with extensive support needs—housed within ABC school district's four high schools. Steven, a former special educator specializing in mild disabilities, was in his first year as a program specialist within the ABC school district. Similarly, Armando and Blair were assigned to work with all the special education programs spread across elementary and middle schools, working with 13 and 14 schools respectively. Armando had served as special education teacher and program specialist before coming to ABC school district, and he was currently in his third year as program specialist. Blair was starting her seventh year with ABC school district as a

program specialist and was formerly a special education teacher for students with mild disabilities. Aiyanna was assigned to administer all the alternative special education programs and was in her third year in this position. Aiyanna worked for ABC school district in a different program specialist role before being fired and then re-hired a year later in her current role. Sandy was in her third year as the program specialist, involved in all special education preschool programs. She was a former preschool teacher with experience both in general and special education classrooms. Rose, the program specialist of professional development, had a unique role among the program specialists as she did not directly support any of the district's schools. Rather, she supported all special education teachers by developing and hosting monthly professional development sessions as well as organizing additional training as needed (e.g., trainings regarding academic assessments). Rose was serving in her fourth year as the program specialist over professional development and did not disclose any past positions before joining ABC school district in her current role (see table 1 for participant demographics).

Table 1
Participant demographics

Participant	Position	Prior special education experience	Years in current role
Paula	Special education director	SET*, PS**	4
Gem	Compliance coordinator	SET, PS	2
Alma	Programs coordinator	SET, PS	3
Rose	PS: Professional development	Not disclosed	4
Steven	PS: high schools	SET	1
Armando	PS: K-8 schools	SET, PS	3
Blair	PS: K-8 schools	SET	7
Aiyanna	PS: Alt. schools	Not disclosed	3
Sandy	PS: preschools	Preschool teacher	3

* SET = special education teacher ** PS = program specialist

Methods and Data

Data were primarily collected over 60 hours of participant observation of the special education administrators either in the special education director/coordinator meetings or the program specialist meetings for the 2020-2021 school year. For special education directors/coordinators, a total of 18 meetings were held, each lasting from 30 to 85 minutes. Program specialists held 19 weekly meetings, lasting from 60 minutes to over 3 hours. In all, 37 meetings were conducted. These groups made for useful loci for this study because the group's formal work definitions meant that they were the district's main problem solvers when it came to special education concerns. This meant that the development or limitation of their problem-solving has a direct impact on the work of special education teachers and students with disabilities in the district.

Observational Data: Field Notes, Audio Records, and Research Journals

Depending on the research design choices and the phenomenon under study, the level of participation or observation by the researcher in participant observation can vary (Brannan & Oultram, 2012; Creswell, 2013). In this study of the two groups mentioned above, I assumed the role of "participant as observer" (Creswell, 2013), which involved engaging in the groups'

activities during meeting events. As a participant observer, I took part in the group's discussions and tasks, while also recording data in field notes. I also offered my reactions, expertise, and opinions when prompted during meetings.

Field notes were used to capture group interactions during meetings, events, and interactions that took place before or after meetings. This allowed for a more comprehensive understanding of the context surrounding the groups' activities. Field notes were taken during meetings as well as during informal interactions during Zoom meetings, with both the director/coordinator and program specialists groups using a low-inference narrative and scripting approach. Given that the study was conducted via Zoom, all field notes were typed during meetings. Whenever possible, verbatim statements were captured in quotation marks, while higher inference judgments and interpretations about interactions were noted in the margins. For each meeting event, basic information was recorded, including meeting type and location, start and end time, documents used, and whether the participants were present, arriving late, or absent. The narratives and scripts included details such as participants' verbal and nonverbal interactions, emotional tone, silences, and contextual details such as side conversations. The content of any email communications between group members before and after events was also included, along with details from documents collected during meetings, such as agendas and key points of information. After each meeting, an analytical memo was written, capturing the immediate interpretation of events and noting any new insights (Charmaz, 2014). To ensure reflexivity a research journal was maintained alongside field notes. The purpose of this journal was to record my emotional reactions and reflections on the findings of meeting events, in which I noted emergent research decisions, my impressions, and feelings (Coghlan & Brannick, 2007). This practice allowed for a disciplined reflection throughout the study, considering how my emotions and assumptions may have impacted the participants' interactions and the patterns in the findings (Coghlan & Brannick, 2007).

In addition to the fieldnotes, all meetings with the director/coordinators and the program specialists were audio recorded to enable a closer analysis of dialogic exchanges, for a total of about 26 hours for the director/coordinator team meetings and about 34 hours for the program specialists' meetings (see table 2). These audio records were transcribed by a professional service, two graduate students, and me with all transcribed audio reviewed for corrections by myself. The only time that audio was not recorded and only notes were taken was when the team discussed sensitive student information (e.g., the mental health of a student, abuse in the family, self-destructive student behaviors) due to ethical concerns and to ensure student privacy.

Table 2

Director/coordinators and program specialists' meetings attended for the 2020-2021 school year

Month	**Director/Coordinators Meetings**			**Program Specialists Meetings**		
	Total meetings per month	Total time per meet (hrs, min)	Total duration per month (hrs, min)	Total meetings per month	Total time per meet (hrs, min)	Total duration per month (hrs, min)
Nov	1	1hr 25m	1hr 25m	0	0	0
Dec	3	57 min 1hr 19m 1hr 26m	4hrs 22m	0	0	0

Jan	2	1hr 39m 1hr 29m	4hrs 34m	2	57m 59m	1hr 56m
Feb	3	1hr 24m 52m 1hr 18m	4hrs 39m	3	1hr 56m 2hrs 07m 1hr 59m	6hrs 2m
March	3	51m 1hr 4m 1hr 38m	3hrs 29m	3	3hrs 9m 2hrs 40m 2hrs 9m	7hrs 58m
April	3	1hr 18m 1hr 38m 1hr	3hrs 56m	4	1hr 17m 2hrs 34m 2hrs 13m 1hr 31m	7hrs 35m
May	2	1hr 21m 1hr 22m	2hrs 34m	4	30m 2hrs 12m 2hrs 05m 2hrs 26m	6hrs 43m
June	1	1hr 28m	1hr 28m	3	48m 1hr 12m 44m	3hrs 44m
Totals	18		26hrs 17m	19		34hrs 38m
Ave time per meet			1hr 28m			1hr 49m

Note. Meeting minutes were rounded up to the nearest minute.

Methods and Data

In addition to observational data from group meetings, I also conducted a total of twelve formal interviews with seven of the members of the special education administrative team, as Aiyanna and Rose declined to be formally interviewed (see appendices A and B for interview protocols), during the school year; the interviews lasted between 27 and 71 minutes, totaling about 15 hours (see table 3 below). Formal interviews served multiple purposes for the research. Firstly, they provided an invaluable avenue for gaining an in-depth understanding of the participants' experiences, perspectives, and decision-making processes. This depth of insight is crucial for capturing the nuanced realities of the special education administrative team's operational and team dynamics, particularly in navigating the complexities inherent in special education administration. Furthermore, the flexibility inherent in the interview format including probing questions (Corbin, 2007; Price, 2002) allowed for the exploration of topics as they naturally arose during interviews, thereby offering richer, more contextualized data. Moreover, formal interviews facilitated a personal connection between the participants and me, fostering an environment conducive to open and honest communication (Vivyan, 2021). This rapport was

instrumental in encouraging detailed and reflective responses from the special education administrators' team members. The ability to ask follow-up questions or seek immediate clarifications ensured the clarity and accuracy of the data collected, enhancing the study's overall validity. In addition to capturing verbal responses, the interviews allowed for the observation of non-verbal cues, providing a layer of depth to the data that extends beyond what can be captured through surveys or observational methods alone. Such nuances are invaluable in understanding the emotional and cognitive dimensions of problem-solving within the team and how the special education context influences the team.

In addition to formal interviews, I also engaged in 30 reflective conversations with all members of the special education administrators. The conversations ranged from 20-80 minutes each, totaling about 18 hours. I aimed for reflective conversations with as many members of each group as possible, and all members of the special education administrative team engaged in at least one reflective conversation. Some group members, such as Gem and Blair, became regular informants (Peticca-Harris et al., 2016; Shenton & Hayter, 2004) and were engaged in a "conversation" format to capture their genuine perspectives. This format allowed for flexibility, with the participants leading the conversation and discussing important aspects of the groups or school, while also providing insight into their interactions. These conversations were designed to be reflective (Bamberger & Schön, 1983; Bjørn & Boulus, 2011; Spencer, 2010), meaning that participants were asked "to think back" on specific meeting events, share their thoughts and insights, and express their intentions for future group steps. In addition, I provided a neutral description of a particular interaction that I had observed and asked for the participants' thoughts. Through these reflective conversations, I gained insight into how members perceived the group dynamics and how such dynamics influence group interactions. I also learned more about their understanding of their group's purpose and intentions, their plans for group meetings and reasons for avoiding certain topics, their willingness and ability to work on specific tasks, their overall satisfaction with the group's work, and how they perceived the special education context, and the pandemic. Additionally, these conversations served as a "member check" where I could compare my interpretations of group events with insiders' perspectives (Maxwell, 2013). During the year, reflective conversations took place before, after, and in between meeting events. Field notes and audio records were maintained during these conversations. All of the interviews and reflective conversations were recorded via Zoom, and Zoom's transcription service was used to transcribe the audio recordings, which I then reviewed and edited for accuracy.

Supplemental data were also collected from various documents used during group meetings. These included agendas, meeting notes, and meeting-specific handouts and artifacts that were provided to or created by participants during meetings.

Table 3

Interview and reflective conversations

Participant	# of reflective conversations	# of formal interviews	Total time spent interviewing/in conversation with participant (hrs., m)
Paula	3	1	3hrs 58m
Gem	11	3	11hrs 58m
Alma	3	0	2hrs 3m

Gem & Alma	1	0	48m
Blair	3	2	5hrs 33m
Steven	3	1	2hrs 13m
Armando	3	1	2hrs 37m
Rose	0	1	20m
Aiyanna	0	2	41m
Sandy	3	1	2hrs 20m
Total # of reflective conversations	30		
Total # of formal interviews		12	
Total time spent with all participants			33hrs 11min

Note. Gem and Alma engaged in a reflective conversation as a duo.

Data Analysis

To answer this study's research questions, I took a three-pronged approach to data analysis: 1) an analysis of interview and reflective conversation data, 2) an analysis of the weekly director/coordinators' meetings and the program specialists' meetings, and 3) an analysis of longer problem-solving episodes that I refer to as the "change projects" (see table 4 for how each prongs relate to the research questions). The following section will detail the analytic approach taken for each of the three prongs.

Table 4

Data analysis prongs relation to research questions

Prong	Research question (RQ)	Reasoning
1	RQ 1	This prong explores how cognitive and emotional processing factors influence team dynamics and decision-making during problem-solving sessions.
1	RQ 3	This prong provides insights into how the Covid-19 pandemic affects the emotional and cognitive landscape of team members during their problem-solving and daily interactions.
2	RQ 1	This prong investigates how micro-communication manifests in real-time team interactions and influences problem-solving processes.
2	RQ 2	This prong examines how macro-institutional structures and organizational forces are reflected and enacted in the weekly meetings.

2	RQ 3	This prong also assesses how the teams contend with the challenges presented by the pandemic during their regular meetings.
3	RQ 1	This prong focuses on the in-depth analysis of complex problem-solving instances, highlighting the role of cognitive and emotional processing in sustained problem-solving efforts.
3	RQ 2	It provides a view into how larger institutional and organizational contexts influence extended problem-solving activities.

Prong 1: Interview and Reflective Conversations

To better understand the influence of the special education context on the special education administrators, this study combined both inductive and deductive coding techniques, guided by a developed codebook (see Appendix C; Charmez 2014, Glaser & Strauss, 1967). This approach facilitated a comprehensive examination of the themes and patterns emerging from the data, allowing for a nuanced understanding of how the macro-institutional level of the special education context influenced the problem-solving processes—both emotionally and cognitively—for the special education administrators under study. The coding procedure was executed in three distinct phases. The initial round was dedicated to applying a developed codebook based on the special education institutional context literature, followed by a second phase where I allowed themes and motifs to emerge naturally from the data. The third round focused on the systematic organization of these codes into categories, including additions of child codes and new codes to the codebook. This methodological strategy of applying a developed codebook based on the literature regarding the special education institutional context; and then using techniques rooted in grounded theory (e.g., opening coding for themes and motifs; Charmez 2014; Glaser & Strauss, 1967) underscores the value of combining deductive (i.e., the developed codebook) and inductive (e.g., grounded theory) coding in qualitative research; particularly in exploring complex organizational phenomena.

Round 1: Codebook development and application

Since qualitative data has the potential to offer detailed insights into experiences or events through thick descriptions, I aimed to enhance reliability in both collecting and interpreting this data (Creswell & Miller, 2000). As such, I began the development of the codebook with a review of the special education literature base regarding the history of special education, the legalistic nature of special education, and burnout literature for special education teachers and administrators. I selected these three areas as they provide a holistic view of the current special education context and its influence over those within the system.

The special education literature base has well described the current special education context and its influence over the work lives of special education teachers—including compliance demands and pressures (e.g., IEP paperwork demands), a lack of time to focus on pedagogy, overwhelming workloads, and siloing of special education from general education and bureaucracy (Bettini et al., 2017; Billingsley & Bettini, 2019; Borthwick, 2018; Yell et al., 2020). With the special education context well documented (see the theoretical framework chapter), I developed an initial codebook (see Appendix C) to encapsulate key areas of interest

identified both from the literature review and preliminary data analysis. The codes derived from the literature included:

- *Compliance vs Pedagogy (parent code):* Highlighting the tension between regulatory compliance and pedagogical practice, this code captured the dilemmas faced by administrators in balancing bureaucratic demands with educational objectives.
- *Siloization vs Cross-functional Collaboration (parent code):* Identified the operational isolation of teams or departments, a significant factor in the administrative and pedagogical challenges within the special education context. Cross-functional collaboration is positioned as an opposing force to siloization. This code captured instances of effective collaboration and integration among teams.
- *Bureaucracy vs Improvisation (parent code):* Bureaucracy refers to the complex administrative systems and procedures within an organization, often characterized by rigid rules, hierarchy, and paperwork, which can impact decision-making and operational efficiency primarily through the operational isolation within the special education team. Improvisation was conceptualized as having the capacity to adapt and make spontaneous decisions, prioritizing flexibility, creativity, and a willingness to take risks, enabling individuals or groups to respond swiftly to new challenges or opportunities without strict adherence to established protocols or procedures.
- *Workload Overwhelm vs Tasks Accomplishment (parent code):* Workload overwhelm describes the challenges of managing excessive tasks and responsibilities, impacting administrators' performance and well-being. Task accomplishment means that the team achieves goals, objectives, or tasks that have been assigned or set out to be accomplished. The team feels that they have been successful in completing tasks and that the tasks were fruitful or beneficial to them, either individually or collectively as a team.
- *Special Education Teacher Shortage vs Sufficient Basic Capacity (parent code):* Special education teacher code refers to addressing the impact of the teacher shortage on the team. This code explored its effects on schools and students, and delineated potential mitigation strategies. Sufficient Basic Capacity refers to having enough resources, including teachers, to complete core activities such as IEPs, and having enough teachers to fill classrooms.
- *Pandemic-Induced Stressors (parent code)*: This code refers to the unique challenges and pressures faced by the special education administrative team due to the COVID-19 pandemic. There were several codes underneath this overarching one:
    - *Adapting to remote learning (child code):* This stressor refers to not knowing how to support teachers or students during remote learning, nor how to manage and meet the emotional needs of special education students and their teachers.
    - *Maintaining compliance over Zoom (child code):* This stressor is spoken about when it comes to handling IEP meetings and paperwork over Zoom. This could also relate to giving and procuring services for students (e.g., occupational therapy, speech and language), managing overdue IEPs and conducting psychological and academic testing required for IEPs.
    - *Mitigating isolation (child code):* This stressor speaks to establishing and maintaining interpersonal relationships over Zoom.

This initial codebook was designed in Dedoose (2023). Dedoose proved to be a useful tool as I was able to develop a codebook that listed overall, generalized “parent codes” which included definitions and examples of the code. With the initial parent codes established, I was then able to develop new parent codes or *child codes* which could be attached to parent codes. These child

codes allowed me to refine and add to the parent codes which offered a more nuanced understanding of the participants' thoughts and opinions (see Appendix C). With the codebook developed, all interviews and reflective conversations were uploaded into Dedoose. I read through each of the interviews and reflective conversations and applied the appropriate parent code and child code to the relevant section of the transcripts. Once I applied the codebook, I moved on to the next phase of coding.

Round 2: Themes and motifs

To ensure a holistic picture of the special education administrative teams, I began an inductive coding process. Using version nine of Dedoose, I read the reflective conversation and interview data, again in their entirety, to allow themes and motifs to emerge naturally from the data (Charmez 2014; Glaser & Strauss, 1967). As themes and motifs emerged, I created new parent codes and attached them to the appropriate piece of the transcript. I also tagged the transcript piece with a note as to why I developed this code and how the piece represented that code. Instances where the team felt constrained in their ability to implement initiatives due to perceived resistance from teachers or the union were coded as indicative of the team's perception of power dynamics. Also, during this phase, I wrote analytical memos (Charmaz, 2014), where I noted patterns, interpretations, my reactions, and beginning thoughts regarding the participants' responses and how the special education context may have influenced such responses.

Round 3: Categorization of inductive codes

In the second round, I categorized the codes into groups based on the methodology outlined by Charmaz (2014). The data underwent iterative coding, with initial codes applied during the initial data review and further refined during subsequent reviews. This iterative approach guaranteed that the coding process captured the intricate nuances and depth of the data. The interplay between parent and child codes, particularly within the realms of siloization, bureaucracy, and pandemic-induced stressors, delineated the interconnections among different administrative challenges stemming from the special education context. Round three resulted in the following code being added to the codebook:

- *Power vs Powerlessness (child code* of siloization vs cross-functional collaboration)*:* This code captures the impact of external and internal politics on team actions and decisions. It includes considerations of power dynamics, alliances, and the influence of different stakeholder groups on the special education administrators' thoughts and actions.

By employing this coding approach, I attempted to capture the multifaceted influence of the special education context on administrative practices and problem-solving processes.

Prong 2: Weekly Meeting Episodes

For the second prong, a systematic analysis of the special education administrative teams' interactions was undertaken by chunking meeting transcripts into thematic meeting episodes. The purpose of chunking data into episodes is to create smaller units of analysis where themes, motifs, patterns, and pattern variation are more easily visible (Marks et al., 2001; Weingart, 1997). There are various methods regarding how to chunk episodes with some studies regarding group development (Marks et al., 2001), defining episodes as a group process with either a goal-directed activity or a transition activity episode. Teacher community studies have defined episodes as discussions regarding specific issues, artifacts, or topics (Kuusisaari, 2013). In other words, an episode can be seen as a group's interactions with an event, topic, or discussion that has a discernible beginning and end. Considering that group interactions vary widely due to

topics and group members, there is no formal convention regarding episode length (Marks et al., 2001; Weingart, 1997).

Given that this study is about the problem-solving of special education administrators, I am interested in understanding the interactional patterns that lead to the groups' problem-solving actions or inactions. To understand how the teams spent their time during weekly team meetings and to show how they engaged in longer problem-solving episodes, I segmented the transcribed audio data from these meetings using version nine of the Dedoose software program. Firstly, I discuss how I chunked and analyzed the transcribed audio recordings for how the team spent their time during their weekly meetings generally including an analysis of categories identified by the coding process described below. Secondly, I describe how I analyzed two meetings in their entirety to reveal the typical flow of meetings including the emotional responses and the cognitive problem-solving processes of the team. Thirdly, I discuss how I chunked and analyzed the longer problem-solving episodes which I refer to as the "change projects."

Weekly Team Meetings

To better understand how the teams spent their time during their weekly meetings, I first chunked the director/coordinators' meetings followed by the program specialists' meetings into episodes. For the weekly meetings, I define a meeting episode as a set of interactions where the participants name a topic either informally or formally (e.g., following agenda items vs spontaneous discussion) and the team engages in an exchange about the topic (e.g., members share their perspectives, asking questions, providing short affirmative statements such as "yeahs"). For longer episodes which may entail new topics that derive from the current matter being discussed then different, smaller episodes were created to analyze such deviations. After segmenting the episodes—a total of 327 episodes (director/coordinators meetings = 159 episodes and the program specialists' meetings = 168)—I applied one of four codes to the episodes: *team building, side conversations, information receiving*, and *problem-solving* (see tables 6 and 7 in findings section). The basis for selecting the categories of team building, side conversations, information receiving, and problem-solving was established through an examination of scholarly literature in the fields of organizational behavior and team dynamics (Jonassen, 2000; Kauffeld & Lehmann-Willenbrock, 2012; Nonaka, 1994; Tuckman, 1965).

Team building episodes are defined as deliberate activities undertaken by team members to foster interpersonal relationships and connections, such as giving kudos or engaging in icebreaker activities. *Side conversations* are those discussions unrelated to any agenda item or work duties, such as a team member sharing experiences of purchasing and moving into a new house. *Information receiving* is when one or two members share details about a recent or past event or provide updates. This may also include question and answer sessions, such as the question-and-answer session between the program specialists and the special education director about school reopening during the pandemic. *Problem-solving* episodes involve the team tackling specific issues. This can range from the team recognizing the tension between what is and what ought to (Jonassen, 2000)—for example, acknowledging inadequate transition planning processes for students and searching for ways to improve it—to dealing with externally imposed problems such as those raised by the superintendent. In these episodes, the team discusses the issue, but it doesn't necessarily imply action or resolution. It may involve expressing frustration, imagining ideal scenarios without the problem, shifting blame, addressing the core issue, exploring potential solutions, or revising solutions based on end user feedback.

In addition to the above analysis and the analysis of the interview and reflective conversations, I used the data from the interviews and reflective conversations and compared it

to the observational data to identify patterns as a triangulation method (Jentoft & Olsen, 2019; Mathison, 1988). First, I coded excerpts from the interviews and reflective conversations using the same codes as for the weekly meeting data (i.e., team building, side conversations, information receiving, and problem-solving). I compared the excerpts for specific codes to identify themes within and across participants' descriptions and explanations about the groups' dynamics and process. This process was done to ensure the accuracy of the findings (Jentoft & Olsen, 2019; Mathison, 1988), as I compared the patterns identified from the reflective conversations to those from the weekly meeting data. I reviewed my original notes, research journals, and audio recordings from team meetings to confirm or consider alternative explanations.

Category Analysis

After providing an overview of how the teams spent their time, I conducted a more thorough examination of their communication dynamics and interactions across the four categories identified above—team building, side conversations, information reception, and problem-solving. Within each category, I analyze two specific examples that were chosen based on their clear alignment with the category definitions and their ability to shed light on important aspects of the groups' communication dynamics and interaction patterns (see Appendix D). These selected examples offer valuable insights into the intricacies of how the teams function and interact within their unique context.

Meeting Flows

To delve deeper into the emotional dynamics and cognitive problem-solving processes of the team, I conducted a comprehensive analysis of two complete meetings—one from the program specialists' team and the other from the director/coordinators team. These meetings were selected based on specific criteria: firstly, they had not been previously examined as part of change projects, thus excluding 14 other meetings. Secondly, they exhibited a well-rounded distribution of episode types, including information reception, team building, side conversations, and problem-solving.

With these two meetings chosen, I established criteria for effective problem-solving by drawing from the problem-solving literature (Anderson, 1993; Deshpande et al., 2005; Jonassen, 2000). This criteria include: (1) addressing issues with sufficient upfront information to fully grasp their nature, (2) collectively establishing a clear understanding of the specific behavior targeted for change, (3) exploring some root causes of the issue or behavior, (4) formulating clear decisions and actionable items, (5) selecting or organizing solutions in a way that resonates with end users, encouraging their readiness to change, and facilitating implementation within a reasonable timeframe, and (6) ensuring accessibility of some evidence to assess the effectiveness of the remedy, allowing for adjustments or revisions as needed.

With the effective problem-solving criteria in place, I developed a codebook in the Dedoose software program encompassing the cognitive and emotional processes associated with problem-solving tasks along with codes on how the meetings flowed including topic shifts, the category being addressed (i.e., team building, information receiving, problem-solving, and side conversations), and if the different episode related to the pandemic (refer to Appendix D). With the codebook completed, I uploaded the two selected meetings to Dedoose and proceeded to apply the codebook. Each meeting was systematically reviewed, and each segmented episode was coded according to the predetermined criteria outlined in the codebook. This coding process involved assigning specific codes to segments of dialogue or actions that corresponded to the defined categories of the cognitive side of problem-solving, the emotions experienced by the

team, the shifts in topics of the episodes, whether the topic at hand related to the pandemic, and the category the episode fell under.

Following the coding process, I conducted a thorough analysis of the coded segments to identify patterns, themes, and discrepancies related to problem-solving behaviors and emotional dynamics within each team. This analysis involved examining the frequency and distribution of different codes, as well as the context in which they occurred. By triangulating the coded data with observational notes and contextual information such as reflective conversations and interviews along with meeting documents, I gained a comprehensive understanding of how the special education administrative teams engaged in -activities and navigated emotional dynamics during their meetings.

The insights derived from this coding and analysis process provided valuable information about the efficacy of problem-solving strategies employed by the teams, as well as the emotional factors influencing their team dynamics and interactional patterns. These findings contributed to a deeper understanding of the complexities involved in addressing challenges within the special education context, particularly in light of the ongoing COVID-19 pandemic.

Prong 3: Chunking Change Projects

For the change projects, I chunked the data and coded meeting episodes using the Dedoose software program in the same vein as the weekly meetings (see section above). However, rather than attaching the type of event (i.e., problem-solving, trust building, side conversations, information receiving) to a chunked episode, I "binned" the data. Binning required me to categorize the transcribed audio for all the director, coordinator and program specialists' meetings by thematic or conceptual groups (Miles et al., 2014; Saldaña, 2021). This process helps in analyzing the data by reducing complexity and highlighting patterns or trends with each "bin" or category representing a theme, issue, or concept identified in the data (Miles et al., 2014; Saldaña, 2021). By sorting segments of the transcriptions into bins, I can focus the analysis on how each theme is discussed, the context around it, and its implications (Miles et al., 2014; Saldaña, 2021). This method facilitates a structured approach to understanding the qualitative data and discerning how longer problem events develop and the topics which are centered during them.

When binning or categorizing the transcribed audio for the meetings, I began by attaching an overall code (Miles et al., 2014) regarding the problem the team faced. This analysis proceeded first by coding all the episodes for the special education director/coordinators meetings as these episodes held problems that would then be discussed with the program specialists in their meetings. The general problem codes—derived from the literature and based on my knowledge of the team—that were applied consisted of: compliance, pedagogical, union, operational, funding, teachers, other staff (e.g., school psychologists, speech and language pathologists), program specialists, other administrators (e.g., principals, high-level district administrators such the superintendent). After applying these general problem codes, I went through each "bin" and began to add second-order codes (Charmaz, 2014), that detailed the issue further. For example, excerpts under the "compliance bin" were subsequently labeled as overdue IEPs, transition planning (moving a student from one grade level to the next or out of the K-12 schooling system), and IEP paperwork (see table 5).

After the second level of coding, I made data reduction easier by constructing data stream matrices that showed how problems unfolded across time and to highlight key patterns and variations. Analytic memos (Charmaz, 2014) were written to explain the patterns while consulting earlier analytic notes and research journals meetings to consider alternate

explanations as a form of triangulation (Jentoft & Olsen, 2019; Mathison, 1988). The same process was followed for analyzing the program specialist meetings, including chunking and coding meeting episodes, adding new codes where necessary, and constructing data steam matrices to show how problems unfolded over time. Finally, a cross-group data stream meta-matrix was created to capture key patterns and how problems unfolded across time and across the teams to better understand how problems manifested, were approached, and were solved.

Through the data streams, I was able to identify the groups' problem-solving patterns—including emotional and cognitive processes—and how the special education context and the pandemic influenced the special education administrators in this study, which informed my subsequent analysis. These data streams formed the basis of the change projects. While reviewing the data streams, I explored different ways of representing the patterns of the teams' problem-solving and concluded that it was important to depict the interactions and confluence among them over time—hence the change projects were selected as the team addressed a certain problem over time even if the problem shifted or changed slightly. To develop the change projects, I used the data streams to create an overview of key interactions of the teams related to problem-solving efforts. To achieve this, I wrote a low inference narrative of the data streams, starting with the first meeting in the stream, noting how subsequent meetings and the approach to the problem at hand changed or morphed, and how the approach to the problem developed as I moved through the meetings in the associated data stream. Change projects, identified via the low-inference narratives, were then examined for how the emotional and cognitive processes of problem emerged among the group. Here, I verified my analysis against the raw data and earlier notes and composed analytic memos to explain these patterns and dynamics.

From this process, I developed four change projects: the passport change project, the visibility change project, the Goalbook change project, and the handbook change project, which form the centerpiece of this study. These change projects reveal several key dynamics; notably how the teams engaged in problem-solving—including both emotional and cognitive side of problem-solving—and how they approached problems against the backdrop of the COVID crisis while navigating the special education context.

Table 5

Binning for the change projects

Change project	# of director coordinator meeting episodes	# of program specialist meetings episodes	Total # of episodes in the change projects	First level code applied to bin	Second level code applied to bin
Passport change project	3	2	5	Compliance	Transition
Visibility change project	3	1	4	Program specialists, other administrators, operational challenges	Visibility, restructuring of program specialist work

Goalbook change project	2	5	7	Compliance	IEPs, paperwork, goals
Handbook change project	1	3	4	Pedagogy, compliance, operational challenges	Handbook

Epistemology and Validity

This study is based on a critical realist epistemology (Maxwell, 2013), which acknowledges the existence of an objective reality that can only be known subjectively. Biases and subjectivities are not avoided but are made explicit and subjected to critique. In participant observation, there is a risk of researcher bias and reactivity affecting the quality and accuracy of the data collected and the inferences made (Maxwell, 2013). To address these validity threats, this study used qualitative and action research strategies to establish the trustworthiness of the findings, guided by a conceptual framework that specified important assumptions (Miles et al., 2014; Schensul & LeCompte, 2013). The use of prolonged engagement with participants, audio recordings and transcription of events; field notes with separate low-inference descriptions and higher inference judgments and feelings; interviews and reflective conversations to verify members' perspectives; and triangulation between multiple data sources enhances the trustworthiness and credibility of the data sources and the inferences drawn from them (Coghlan & Brannick, 2007; Maxwell, 2013).

Navigating My Researcher Role

Gaining insider access during participant observations is necessary to closely examine group interactions when an administrative team is facing challenging circumstances. In my case, my prior experience as a former urban special education teacher for students with extensive support needs in northern California and as a member of the RPP was a crucial factor in gaining acceptance as a quasi-insider. Throughout the study, I drew upon my expertise as a special education teacher and as a member of the RPP to build rapport and actively engage in team discussions. Special education administrators would ask for my opinion during group meetings and informal interactions, and they acknowledged my understanding of their experiences. Building relationships and actively participating in group meetings and activities throughout the year also helped me gain acceptance. As a constant, friendly presence, I offered support and forged emotional connections. In so doing, I was able to integrate myself into the group and establish trust. As the study progressed, my insider status solidified, and I continued to participate regularly in the group's meetings alongside its members. By being in close proximity to their reality and by building trusting relationships, I shared in the same experiences (both rewarding and frustrating) as they did. This increased level of proximity and shared experiences led participants to be more forthcoming with their authentic struggles, hopes, desires, and honest opinions.

However, my mere presence was not enough. Overburdened administrators didn't just want someone to empathize with them; they wanted assistance. To provide it, I combined my insider positionality with my outsider role as a researcher and district partner, sharing research knowledge when asked. Being deeply involved with these administrators created some challenges in balancing my insider and outsider roles, requiring me to make real-time judgments to maintain role boundaries and it demanded careful reflexivity. This involved efforts to regulate

my own participation and create sufficient psychological distance, which included time spent in reflective conversations, transcribing meetings, writing journal entries, and memoing to provide myself with multiple ways to check for accuracy in my data and bias in my interpretations. These steps were essential for adding depth to my analysis and ensuring my eventual findings were credible.

Limitations of the Study Design

The main goal of this study is to generate theoretical insights rather than generalizing to a larger population beyond the specific district and administrators studied. Although this district and the administrative team were a suitable case for the phenomenon, it was not selected through a theory-guided process of selection but through the happenstance of being a part of ABC district's RPP. The district RPP allowed for prolonged engagement and the development of trust and rapport with participants, which enabled open sharing. However, it is possible that the researcher's affiliation with the district influenced the groups' behavior and the information shared during interviews and reflective conversations. To enhance the study's findings, additional data collection methods could have been employed, such as inter-rater reliability for coding interviews, reflective conversation, and meeting data as well as the systematic measurement of factors associated with problem-solving and group development (DeWalt & DeWalt, 2011). These measures would have increased the strength of the evidence, improved comparability across participants, and reduced potential bias and reactivity. Ideally, I would have preferred to conduct repeated reflective conversations with all members of the groups. However, scheduling reflective conversations with administrators who were already overwhelmed with their workload and with the pandemic was challenging, resulting in instances where staff did not attend or canceled last-minute.

Strengths of the Study Design

Despite the aforementioned limitations, this study benefitted from a wealth of rich data derived from extensive, long-term engagement and audio recordings with real-world special education administrators operating under adverse conditions. Few studies exist which closely examine the dynamics of special education administrators' groups in districts that serve disadvantaged populations, where improvement is typically needed most. This study employed participant observation across two groups of special education administrators offering diverse perspectives that allowed for more profound insights into the possibilities and challenges of problem-solving under the special education context and amidst the pandemic. This was further enhanced by comprehensive data from various individuals, representing multiple positions on the administrative team, providing a relatively comprehensive view of a district's special education administrators team. My background as a former urban special education teacher and a district RPP member provided me with the necessary skills and empathy to conduct thorough participant observation, recognizing both the strengths and limitations of special education administrators working in challenging environments. Despite the instances of group dysfunction that I witnessed and the participants' admission of unprofessional behavior and preferences, I am confident that, for the most part, participants shared with me their genuine perspectives and challenges.

CHAPTER 4: FINDINGS

Having immersed myself in the day-to-day operations of the special education administrative teams—the director/coordinators team and the program specialists team—in the ABC school district, throughout an academic year, this study endeavors to provide a comprehensive analysis of their experiences and problem-solving strategies. Acknowledging the

profound impact of the special education institutional context and the disruptive influence of the COVID-19 pandemic on the work of these administrative teams, I delve into the intricate problem-solving processes within their institutional context. By examining these dual layers, shaped by cognitive and social-emotional factors, I aim to reveal how they interact to generate both obstacles and opportunities for problem-solving in the complex landscape of special education.

The COVID-19 pandemic also introduced unprecedented challenges to education, necessitating rapid adaptation and innovative approaches to teaching and learning. Special education administrators, responsible for supporting students with diverse needs and their teachers, encountered unique hurdles in this tumultuous environment. Against this backdrop, my investigation focuses on the director/coordinator team and the program specialists team within ABC school district. I explore how they navigate the urgent demands of this unprecedented period while addressing longstanding district and special education issues. Through this exploration, I aim to shed light on the intricate interplay between cognitive and social-emotional processes in problem-solving within the special education department. By uncovering the challenges and opportunities inherent in this dynamic environment, I seek to contribute to the ongoing discourse on effective problem-solving strategies in special education administration. The context of the COVID-19 pandemic affords me a window into the power of institutional forces under crisis conditions. With that, the findings will proceed as follows (a) an analysis of interviews and reflective conversations regarding how the special education context and the COVID-19 crisis manifested in ABC school district, thus influencing the priorities, actions, and reactions of the teams; (b) a general analysis of how the teams spent their meeting time, including reflective conversations regarding the participants' thoughts on their meeting time; (c) a deeper analysis of the teams' communication patterns to reveal the teams' cohesion and interaction dynamics; (d) an analysis of two meetings in their entirety to examine the micro-level cognitive and emotional dynamics within the team as revealed when problem-solving occurs in longer change projects.

Interview and Reflective Conversations Data

As noted in the methods section, I interviewed seven out of the nine participants—Gem, Alma, Paula, Armando, Steven, Sandy, and Blair—as Rose and Aiyana declined to be formally interviewed for the research. However, all participants engaged in reflective conversations with me—typically, either directly prior or directly after a meeting event (see methods section for more information regarding participants and coding process). It is from these interviews and reflective conversations that I sought to gain a deeper understanding on how the special education context influenced the work and the problem-solving of these teams. From my coding, several salient themes emerged that help to explain the actions of the teams as they engage in problem-solving. I capture these themes in tensions that I assume reflect institutional quandaries that I discussed in the theoretical framework chapter. These tensions are (a) compliance versus pedagogy; (b) siloization versus cross-functional collaboration; (c) power versus powerlessness; (d) bureaucracy versus improvisation and lack of implementation; (e) workload overload/overwhelm versus task accomplishment; (f) special education teacher shortage versus sufficient basic capacity (see Appendix C). Furthermore, I analyzed the reflective conversations and interviews not only to comprehend the special education context but also to gain insight into the impact of the pandemic on their work (see Appendix C).

The Special Education Institutional Context

Compliance versus Pedagogy

Special education administrators often face the challenge of balancing compliance and regulatory requirements with the need to provide effective, individualized instruction to students with disabilities. This tension arises because regulatory compliance, such as ensuring proper IEP paperwork and meeting legal standards, can sometimes overshadow the pedagogical goals of addressing each student's unique learning needs.

This tension between compliance versus pedagogy was often spoken about by participants in this study. When the subject of IEP paperwork and compliance came up, Armando, a program specialist for K-8 schools, expressed, “Getting the IEPs done is just a compliance issue for me ... it was never really about the instruction.” Armando followed this up with a desire for a greater focus on pedagogy. “I wish we could talk more about instructional strategies.” Blair, a program specialist for K-8 schools, also shared this sentiment, lamenting that “I wish we could focus less on IEPs, but we just can't get ourselves [the district] to be compliant.” Steven, the program specialist for the high school programs, also noted how compliance issues dominated his school site meetings. When asked if Steven had time to address pedagogical issues at the weekly high school site meetings he ran, he noted, “we have a lot of things we go over, a lot has to do with IEPs, and it’s [the meeting time] ... at least 50 percent, 55 percent spent on compliance, but we do get to talk about teaching, too.” With much of the focus being placed on IEP paperwork and “getting compliant,” Blair also noted the competition between pedagogy and compliance comes from school sites as well. “They [schools] don't seem to care about interventions [for students with disabilities] ... we have some schools who really only care about compliance.” During a reflective conversation with me after a special education department meeting at one of the school sites she oversaw, Blair also noted a tension between completed paperwork and teaching. She explained to me that she had a particular teacher who was “great,” but he “didn’t care about IEPs or compliance at all.” She felt uncertain about how to approach this teacher, who had numerous overdue IEPs due to being so “focused on teaching,” a quality she appreciated. However, as “his administrator,” she believed it was necessary to meticulously review his IEPs “page by page” alongside him to ensure compliance, but she was reluctant. “I don’t want to do that because he is such a wonderful teacher,” she said.

This tension between pedagogy and compliance is echoed by Gem, the district's compliance coordinator. In a reflective conversation with Alma and me, Gem recognized the dual nature of this task, describing compliance as both a “blessing and a curse … like thank God, we have this compliance, and other times I'm so bogged down by it.” Gem further noted that “We're trying to move them [the program specialists] into a position where they're seen as not just compliance oriented but more a resource for instruction." Alma nodded her head in agreement to this statement, but also noted, “Our out-of-compliance numbers have gone way up when everyone else’s [other districts] has gone down. That’s embarrassing.” Echoing Alma’s sentiments, Gem shared her struggle. She acknowledged her desire to be more “pedagogically focused”—even joking that she doesn’t like the title of “compliance coordinator”—yet she confessed to the overwhelming pressure of compliance accountability. “It's hard,” she admitted, “when you have the CDE [California Department of Education] yelling at me about 584 overdue IEPs in the district that motivates me *more* [italicized to reflect emphasis], like ‘Okay everybody get your doggone IEPs done.’”

The overall idea of “compliance” seemed to be in competition with pedagogy until goals were discussed. For the special education director, Paula, compliance and pedagogy are not a contradiction, rather goals, as written and adhered to in a student’s IEP, are the basis of good teaching. Paula’s point is captured by her personal motto: “commitment through compliance.”

This statement underscored her belief that adherence to regulatory standards was a key component of educational commitment and effectiveness. She further explained that "teachers show commitment [to teaching]" when "they have solid IEPs." For Paula, the compliance components of the IEPs (e.g., well-written goals, up-to-date services, and service minutes, all needed signatures, affirming and attesting the IEP) demonstrated a "dedication to teaching" on the part of the teacher. When pushed to detail how she knew if having legally compliant IEPs translated into "good teaching," she was unsure, but noted that "well-written goals" were at the "heart" of the IEP and teaching.

Many of the program specialists echoed Paula's view, particularly when the interviews and reflective conversations turned to IEPs and "goal writing" or "goal setting." The program specialists made similar statements as Paula that good teaching was inextricably linked to goal writing, though they could not detail why this might be the case. Steven noted that "the goals really are like the centerpiece of the IEP because that's where you're going to show the progress the student is making, that's where you teach from." Rose supported this statement stating, "The importance of IEPs is that it drives some of your instruction because you're going to be supporting these students through their goals and objectives." Steven and Sandy both highlighted the importance of "student-centered" teaching, emphasizing that this approach is closely tied to setting "good goals." Steven specifically pointed out the need for better training of teachers in the district on "how to write better goals," seeing this skill as a crucial element in enhancing their teaching effectiveness. This emphasis on goal formulation and documentation is not unusual, given how deeply entrenched goals are in the realm of special education. The practice of emphasizing goals in IEPs is a well-established norm within special education: anchored in legal and educational frameworks, notably the Individuals with Disabilities Education Act (IDEA) of 1975—as discussed in the literature review.

Siloization versus Cross-functional Collaboration

Siloization versus cross-department collaboration highlights the contrast between teams or departments working in isolation and efforts towards collaborative, cohesive work. Special education often involves various specialists, and balkanization—the fragmentation of a larger entity into smaller, often conflicting parts—can lead to fragmented service delivery, and academic and social supports where the holistic needs of students may not be fully addressed. However, collaboration in this setting refers to the integration of efforts across different specialties, ensuring a more unified and effective approach to meeting the diverse needs of students with special education requirements. Unsurprisingly, the concepts of siloization and collaboration were described differently depending on the administrative group to which the participant belonged. Gem, Paula, and Alma talked about feeling overall excluded from the "general education side of the house," as Paula noted, whereas the program specialists focused the issue of siloization on being left out of financial considerations, particularly when it came to the purchasing of curriculum and materials for students with disabilities.

In an interview with Alma, regarding her role as the programs coordinator, she noted that she wanted more support from their general education administrator counterparts—principal supervisors, director of curriculum and instruction, assessment coordinator, professional development coordinator, the superintendent, and the assistant superintendent over curriculum and instruction, and the associate for student and family services—who also formed a team that tackled issues pertaining to general education students and the district as a whole. When discussing this team, Alma noted, "They don't include us … in anything." She further detailed how the special education department was always "excluded" from "district-level decisions," and

this negatively impacted the work the special education administrators do as "gen ed [general education] teachers complain and say they don't have to do that [support students with disabilities within their classrooms]. What do we do with that?"

Paula shared a similar notion, pointing out a noticeable divide within the district between special education and general education. She conveyed that the special education department's slogan is, "Special education isn't a place, but services … but it doesn't feel that way." She also highlighted that, despite holding the title of "director of special education," she does not have a place at the table during the high-level administrators' weekly meetings that Alma referred to. She emphasized that "no one in [those] meetings are from the special education department or have a special education background" effectively leaving special education students and teachers out of higher-level decision making. When a special education issue needed attention from the high-level administrative team, Paula had to "bring her requests" to the associate superintendent for student and family services, who then relayed these requests to the other administrators. Paula believed that this method of channeling her department's needs and desires through the associate superintendent resulted in "misunderstandings" and caused other administrators to prioritize the "general education student needs" over those of the special education students. She expressed her desire to change the department's name from "special education department" to "special education services" to emphasize its integration within the broader educational system and eliminate the perception of it as a separate entity. Although, she lamented, "this would never be possible" since having a special education department was "just how SPED [special education] is done."

Even though Paula and Alma talked about their involvement with the high-level administrative team and participating in district-wide decision-making processes, the program specialists perceived the siloization in a much more concrete sense. When discussing how the district overall could better support the work of the program specialists, the program specialists brought forth two consistent themes: curriculum and funding. Sandy noted that, "Most of my preschool teachers are concerned that we don't necessarily have a preschool curriculum." She noted that she tried to rectify this situation but to no avail:

> We did try to purchase preschool curriculum, but because of the budget and because they're [the curriculum department and the director of curriculum and instruction] not sure how willing teachers are using it that they'd rather just purchase it for the teachers who are going to use it, but we still haven't gotten anything yet.

In interviews with Blair and Armando, they emphasized similar concerns as Sandy. Blair stressed the need for consistent curriculum use across general and special education. She stated, "We need to make sure that our teachers have the right curriculum … they need the [same] curriculum that our general ed staff are using … but they don't get anything." Armando called out that special education teachers were "left out of the budget" for the schools and district, and that "some administrators don't think we need curriculum."

Most of the answers given had a sense of frustration to them and suggested that special education was at odds with general education, with general education taking priority until "something bad really happens" as noted by Blair. This "something bad" pertained to the overwhelming number of overdue IEPs—over a 1,000 at one point during the 2020–2021 school year—in the district. Gem noted that the overdue IEPs have "always been an issue even before the pandemic, but no one really cared." She further detailed that the district administrators only care now because we are under "an audit from the CDE." Paula noted that the overdue IEPs were an "all hands-on deck" situation, and it "forced" the other administrators, including the highest-

level administrators and principals, to finally confront long standing issues when it came to completing IEPs. Blair stated it best when she expressed that principals were "finally being called to the carpet" by the district's superintendent because "there are so many overdue IEPs." This occurrence of collaboration implies that district-level administrators may only prioritize special education when the district is no longer in compliance, highlighting a focus on compliance rather than the educational needs of students with disabilities.

Power versus Powerlessness

When discussing district support for the special education administrative team with the program specialists, director, and coordinators, the theme of weak political influence seemed to be an overall contributor to the balkanization or siloing that the special education administrators were experiencing, leading to a sense of powerlessness for the teams. In special education, there is an intricate interplay of political influences that are shaped by various internal and external factors, including power dynamics within educational institutions and the impact of external stakeholder groups such as unions. As seen in the prior sections, decisions and considerations (or a lack thereof) made by higher-level administrators can significantly affect special education policies and practices, often without the input from those directly working with teachers and students. Within school districts, interdepartmental competition for resources, particularly between special and general education, can be challenging, necessitating strategic alliances among teachers, administrators, parents, and other stakeholders for effective decision-making. Additionally, teacher unions significantly influence policies and practices, advocating for educators' rights and working conditions, thus impacting staffing and workload. Navigating this complex political landscape in special education requires a deep understanding of these dynamics, strong advocacy skills, and adept negotiation and diplomacy, all aimed at enhancing outcomes for students with disabilities.

Interestingly, the director, the coordinators, and the program specialists did not cite an example of having strong political standing within the district. This could be because the special education administrative team felt constantly under threat. Paula noted how she "always had to justify" why she needed "so many program specialists," and that if financial "cuts" needed to be made that these positions would be "axed first." As seen in the above section, being removed from higher-level district decision-making placed the director and her coordinators at a disadvantage as the higher-level administrators could not "see" or "value the work" of the special education administrators and, namely, the program specialists. Being left out of such higher-level district decision-making processes and opportunities, coupled with the perceived and real "roadblocks" beset by the union, led to a pervasive sense of powerlessness of the special education department and administrators, the ramifications of which can be seen at the school sites.

Additionally, all the participants mentioned the "battles" of getting support from general education departments at school sites. Paula noted that her "former school district was lightyears ahead of ABC district" when it came to inclusion of special education students into general education classes. She felt that though inclusion was "core" to her mission for special education, she must "battle schools, the union, and other admins [the higher-level administrators]" to do this. This led her to think that she needed to craft "a district-wide policy" that would "mandate" inclusion for every student with disabilities as this would be more "enforceable" than just her mission statement. Though she had faith that this could work, she noted that she would probably "never be able to get through the union or the district higher ups." Additionally, Armando saw the lack of inclusion as a manifestation of the separation between the special education and

general education departments and the weak political standing of special education within ABC District. “General education teachers are very reluctant to take our SPED [special education] students, and that comes from the top [the higher-level district administrators].” Steven also noted that “scheduling and getting our kids into the right classrooms … the gen ed [general education] classrooms … it’s tough.” Blair continued this theme when she shared that she felt “like [general education] teachers can do whatever they want,” including the exclusion of children with disabilities from their classrooms as it “isn’t pushed even when it’s in a kid’s IEP.”

With the siloing and the balkanization of the special education department from the general education department and the highest-level of administrators lacking special education representation, the special education administrative team felt a lack of political influence within the district, especially when it came to the union and special education teachers. The union in ABC school district was particularly powerful. The union had strong leadership, which allowed them to be a part of most district decision-making processes. Gem put it best when she stated, “It's a big district. There are a lot of students. There are a lot of competing energies and entities … we are just one.” She followed this statement up with “I think that there is some political game playing or something going on behind the scenes with [the union] and Paula ... It's putting a monkey wrench in moving forward on some stuff.” Gem's remarks indicate that although she was unable to identify any specific initiatives that were being delayed by the union or the reasons behind this delay, it was evident, to her, that the union was actively engaged in taking preventative measures. Paula noted this as well in an interview with me. she felt “exhausted” when dealing with the union noting that “... trying to make any kind of shifts or changes ... is also extremely challenging because of these roadblocks that I believe are from the union.”

All participants saw the union as a way for teachers to “get out of” any initiatives that the special education administration might try to implement. The team often noted “teacher pushback” to initiatives, resulting in many of them becoming voluntary as the teachers “would run to the union if they don’t like something we are doing” as Gem noted. The teachers' pushback and union pressure rendered the team powerless to enact many initiatives that they felt beneficial to students and teachers. Armando gave a prime example of this when discussing how he felt some initiatives needed to be mandatory for teachers, but these efforts were hampered by teachers, with union support:

> Whenever a teacher feels they're being mistreated or they're being asked to do something additional [outside of their roles and responsibilities listed in the teacher’s contract], right away, the union gets contacted. A lot of teachers use that [the union] as a shield…but we have to make some of the stuff mandatory. If not mandatory, then, making it essential … but I don’t see that happening in ABC school district.

Blair seconded this when describing how hard it was to get teachers to “try anything new.” She noted, “Our teachers are definitely a barrier because to try anything new there's always pushback. It's hard to act upon anything in a way that's meaningful because you can't really make people; everything is a negotiation.” Exasperated, Blair continued, “It can be really hard to just do what's best for kids because it's like teacher first instead of being more child centered.” Even Steven, who was generally stoic, spoke about how teacher resistance “irritated” and “upset” him because “teachers should be in the work for kids.” In an interview, he stated that he did become “angry” with some teachers when he encountered pushback to professional development opportunities. “I told them, ‘Hey, I don't care what the union said if that wasn't a paid thing [the professional development training], come on, why are you here if you don’t want to be better [teachers] for the kids!’” When asked if this statement caused any of the teachers to

reconsider, he did not address this specifically, but rather told me that "I am an advocate … whatever needs to be done for kids should be." However, he expressed a powerlessness in the face of teacher resistance, noting that the teachers "won't do anything extra" and "I am just now realizing the politics … what can I do about that? I'm just a middle manager." Aiyana, in a reflective conversation, also expressed how she thought the union allowed for teachers to continue with "bad practices." She noted, "If you have 10 out-of-compliance IEPs on a caseload of 15, and you know nothing is going to happen to you, then why change." She insinuated that teachers won't change because the "union will back them" causing the district to back off changes or demands when faced with pushback or perceived pushback from the union.

Gem, Alma, and Paula all expressed similar concerns to the program specialists when it came to teacher resistance. With Gem noting how the district felt "teacher centered" rather than "student centered." In a reflective conversation with Gem and Alma regarding the work of the program specialists, both noted that any changes to policies and practices would be met with "backlash" and "pushback" as Gem put it. The ideas of "backlash" and "pushback" were most palpable when discussing the development of a special education handbook, which would detail programmatic conformity and uniformed protocols that all special education teachers would be asked to implement (see change projects below). Alma shared, "We need to have a plan to roll it [a special education handbook] out. I'm thinking about all the pushback we're going to get to the policies with this plan. How are they [the teachers] going to respond? how will the teachers perceive it? Gem answered the question: "You know they won't like it. No one likes change." She continued, "I think any change effort that we're trying to implement or any change … will be really hard … teachers just don't have the accountability to be required to do it. So how can we expect change to occur?" When I asked Gem and Alma what was needed to change teacher practices, neither had a concrete answer for this. Gem expressed that it is "challenging because teachers don't have the skills, don't have the tools to teach, but they don't want anything to help them get better." She further noted that the lack of good teaching and wanting to improve "drives me crazy. It's borderline criminal, in my opinion." Alma agreed with this sentiment but also did not know how to create change given that it "sometimes feels like teachers can do whatever they want … or don't want." Even Paula felt dejected by the state of teaching in the district and felt that improving teaching and learning would be "Extremely challenging because of roadblocks that I believe are perceived to be from the unions." When I asked her what she believed these roadblocks to be, she stated, "The term 'academic freedom' [the principle that teachers should have the freedom to teach without undue interference or censorship from outside forces (e.g., the district)] being put into our union … teachers' contracts, is somewhat being abused by teachers." When asked if Paula had any ideas on how to balance "academic freedom" with improving teaching and learning, she stated "trying to make any kind of shifts or changes in any of those policies would be next to impossible. The union super-duper protects their [teachers] way of life, if you will, so you know nothing will happen [to change teachers' practices].

Surprisingly, throughout the interviews and reflective discussions, the concept of parents or their political influence did not emerge as a potential stakeholder group that the team considered as competitors or as a group likely to offer support. This could be because questions related to political influence did not specifically mention parents, or it could suggest that parents were neither seen as a hindrance nor a significant source of support for the special education department in their efforts.

Bureaucracy versus Improvisation

In special education, decision-making often involves navigating through multiple hierarchical layers within educational institutions, a process that can delay decisions and pose challenges in addressing the immediate, individualized needs of students with disabilities and their teachers. Bureaucratic procedures play a major role in dictating the allocation of resources and funding within special education, leading to difficulties in ensuring that these resources are distributed both effectively and equitably among students with diverse needs. Additionally, administrators as well as teachers often find their professional autonomy constrained by bureaucratic directives beset by both the special education institution and district, constantly struggling to balance their expertise and understanding of students' needs against the demands of administrative and procedural requirements.

All participants, except Paula, expressed feeling bogged down by the bureaucracy they faced in the district and by the special education context. This could be that Paula saw bureaucracy as a benefit to her role as the highest-level administrator in special education. She noted that when she first started in the district as the special education director, she had to "clean house," including firing several program specialists who wouldn't "fall in line," one of which was Aiyana, who was ultimately hired back in a different program specialist role. She felt that she had "to take the reins because people were doing whatever they wanted, saying whatever they wanted." She felt undermined during her first few years as special education director, causing her to "tighten her grip" on the program specialists and other staff members to ensure that everyone would "fall in line." This "tightening" served Paula in the short term as she was able to fire and hire people she felt "could do their jobs," but she also acknowledged that this "iron-fist" approach diminished her rapport with the program specialists and ultimately stifled their desire to problem solve with her (see the section on weekly meetings for more on the team's interactions and development).

The coordinators and the program specialists highlighted bureaucracy as a factor that discouraged individuals from making prompt and decisive decisions. During a reflective conversation with Alma and Gem, we explored the factors that inhibited the program specialists from taking immediate action and making independent decisions at their respective school sites, and how the director and coordinator team could work to rectify this. Gem and Alma both agreed that they wanted program specialists to become "problem solvers" and make "decisions" for their schools and the district regarding special education. However, Gem noted that "There's five layers of admin … there is a sense that you can step on toes easily," which prevented the program specialists from taking on such a role. Alma acknowledged this and offered "Right, and I would like them to be able to see them more of like support, not so much like the holder of all the answers." Though Gem agreed with Alma, she also noted,

> It's [the administrative bureaucracy] very challenging ... there's no actual structure to hang your hat on. They [the program specialists] will always have to have them [the answers],
>
> but they are too afraid to say them because they may be wrong or not quite right…

Alma and Gem shared a common perception that the emphasis on bureaucratic processes and the consistent demand for uniform communication from program specialists—a running theme observed in interviews, meeting analyses (see below), and the change projects (see below)—acted as a deterrent for program specialists to actively engage in "problem-solving at their school sites." This hesitation was attributed to their fear of potential "reprimands" from Paula, as noted by Gem.

This idea of the internal chain of command and "being on the same page" was expressed by all the program specialists, except Rose, whose reflective conversations did not explicitly

address bureaucracy or hierarchy. Steven, Aiyana, Armando, and Blair all shared the notion that "being on the same page" was crucial to having effective communication within the district. When discussing his role as a program specialist, Steven noted that he acted "as a liaison between the schools and the district higher ups ... your programs coordinator, your compliance coordinator, and the director, and your school." A common sentiment among program specialists was their perception of themselves as the key conveyors of special education information to their respective school sites, which underscored the importance of them working with and disseminating consistent information. As Blair put it, "Teachers can't go to Paula and say, 'I heard *this* from Armando, and I heard *this* [something different from what Armando said] from Blair, if we are saying the same thing." Steven also noted that when the team were "not all on the same page" that teachers would "jump the chain of command" going to Paula or the coordinators directly to "find out the answers" effectively making "us [the program specialists] look bad, like we don't know what we are doing." The coordinators acknowledged that ensuring messages and directives passed down through the hierarchy were consistent and clear reduced the chances of misinterpretation, which was crucial for the program specialists to avoid reprimands from the director.

While the fear of "looking bad" hampered decision-making and led program specialists to desire "being on the same page," several of them also acknowledged Paula as the "ultimate decision-maker" for the department, as articulated by Aiyana. During our interview, Sandy expressed how the district's bureaucratic hierarchy posed obstacles to her when it came to making decisions:

> The barrier for me [when it comes to making decisions] is that ultimately it has to be Paula's decision ... I can't give an answer because it's ultimately up to Paula. Some of the inquiries [from teachers and school sites] require you to do research and for you to either meet with other people to get the answer. If there's some decisions that are above my pay grade, then I can't just be like 'Yeah sure. Let's do that' even if I want to [say that]

This sentiment was shared amongst the program specialists, with Blair calling out that "Higher-level decision-making has to come from either a coordinator or the director." She went on to suggest that she felt "uneasy" to make unilateral decisions for school sites without first consulting with the coordinators or directors, as she sought their approval to provide support and "backup" for her decisions. The pervasive influence of bureaucracy is evident in the experiences of the program specialists and acknowledged by Gem and Alma, with almost all participants, except Paula, feeling overwhelmed by bureaucratic processes.

Workload Overwhelm versus Task Accomplishment

In the special education context, workload overwhelm or overload is a critical issue, characterized by administrators facing a daunting array of tasks and responsibilities unique to this field. The need for IEPs for each student significantly adds to the workload, demanding extensive time and effort—by teachers to write them and administrators to ensure compliance. Coupled with this is the complexity of managing detailed paperwork and ensuring compliance with educational laws which further intensifies the workload. Collaborative efforts with teachers, other district administrators, including principals and higher-level district administrators, and the challenges posed by resource constraints, including limited staffing (e.g., teachers, speech and language pathologists), all contribute to the overload and overwhelm felt by many special education administrators. This confluence of high demands, complex administrative duties, and the emotional labor involved in special education can lead to burnout, affecting the well-being of special education administrators.

When talking with Alma and Gem in a reflective conversation regarding the program specialists, both of them shared concerns for how "overloaded" the program specialists were, in terms of their meetings but did not express that they, as coordinators, felt overwhelmed. When I asked them how they felt about their workloads, Gem replied rather nonchalantly, "That's just my job. I knew what I was signing up for." Alma also expressed that she was mainly concerned for the program specialists as they are "tied up in meetings all the time, which is *a lot* [italics added for emphasis] for them." Alma then pointed out that, except for Rose, each program specialist had the responsibility of leading a weekly meeting with the special education department at their respective school sites, which for Armando and Blair equaled to 14 and 13 meetings per week respectively. Paula, though sympathetic to the program specialists, did not think that the program specialists should be "coddled" because the job is "difficult and demanding," and "no one made them do it." Paula then shared that one goes into administration to "support more students than they could in the classroom." Paula's quote suggests that being an administrator was answering a higher calling for her, and that the multiple, and possibly daunting, responsibilities are for the benefit of "marginalized children," so that they "don't fall through the cracks."

However, the program specialists shared that their workloads were unmanageable and untenable and did not necessarily share Paula's perspective. Armando shared that, "I'm super busy meeting with [his assigned caseload of] 14 schools on a weekly basis … it's pretty daunting." He further added that "it's a lot … check-in meetings and program specialist meetings. I'm pretty much in meetings from 8:30 to 3:00." Blair recalled that it's "really hard to try to schedule these things [school meetings and IEPs]; I think, sometimes, it's just a little overwhelming … we're [the program specialist] constantly putting out fires." When asked if Blair shared these concerns with the director or coordinators, she stated that "Paula just doesn't see the need the way that we do … I don't really feel like our director is the most supportive." This was a common theme amongst the program specialists with Ayanna noting that she felt "burdened" by all her responsibilities at the nonpublic schools she oversaw. Sandy was surprisingly candid when describing how she felt regarding her role as the program specialist over preschools:

> Every day, I [am] booked from 8:00 a.m. all the way to 5:00 p.m. Most of the time, I don't have a lunch break ... I work all night just to keep up with the job. I have to sit on 300-something IEPs ... that's like two to four IEPs a day. I feel like I should have somebody helping me because I run like 1/4 of special ed [education]

I then asked if she brought this up to Paula or the coordinators. Sandy shared that she said this many times to Paula, but "she does nothing about it." She noted that the coordinators were both more "understanding" and "try to help" where they could. Sandy then revealed that she planned on leaving the district at the end of the year for another program specialist position in a different district, but she was hesitant to do so because "if I am not the voice for preschool [programs] then they will be left out altogether." Sandy did not return to the district the following school year along with Steven, Armando, and Gem.

Special Education Teacher Shortage versus Sufficient Basic Capacity

The special education teacher shortage presents a significant challenge in the educational landscape, driven by factors such as the high demands and stress of the job, specialized training requirements, and often less competitive salaries. This shortage profoundly impacts schools and students, leading to difficulties in adequately meeting the individualized needs of students with disabilities, larger class sizes, and potentially compromised educational quality. Existing special

education teams face increased workloads and stress due to this shortage that culminates in burnout.

When discussing compliance and teaching, Paula and Blair, in their respective interviews, noted that the high number of special education teacher and paraprofessional vacancies was affecting the quality of special education programs. A common approach used by several districts, including ABC district, to address such staff vacancies, is to rely on teachers who hold emergency or intern credentials and are currently enrolled in credentialing programs. Paula noted that "we have so many [teachers] on emergency credentials, which means they haven't gone through any program, and they just don't know what they're doing." She further detailed that these teachers were a "stop gap measure." Blair, in her assessment of the special education teacher shortage, focused on compliance, noting that the overdue IEPs in the district stemmed from teacher vacancies. She suggested that "I think part of it is our [teacher] vacancies …" Armando supported this idea, stating that most of "his work" was focused on finding ways to "get IEPs done because we don't have teachers, psychs [school psychologists], or people to do them."

Steven took a different approach to discussing the special education teacher shortage, framing it more as a retention issue rather than simply recruitment. Steven shared that he saw himself as "advocating for the young teachers ... so we retain them …"He felt that these teachers were often "not supported" and needed a lot of assistance when "writing goals and understanding IEPs," which could be done via professional development.

Interestingly, though the special education teacher shortage is typically a major concern for many districts, and was for ABC school district, many of the program specialists did not bring it up or only briefly touched upon it. Even when specifically questioned, most of the administrators admitted it was a problem, but their responses did not delve much deeper than this acknowledgment. This may be due to the COVID-19 pandemic as Alma noted that she's "always thinking about that [the special education teacher shortage]" but "there's *so* [italics added for emphasis] many other things to take care of."

The Pandemic

The COVID-19 pandemic dramatically reshaped the landscape of education worldwide, impacting schools in unprecedented ways since March of 2020. With overnight closures, schools were propelled into a state of uncertainty, necessitating rapid responses to ensure student safety and educational continuity. This abrupt shift to remote learning, coupled with the implementation of stringent health protocols, exposed and exacerbated preexisting disparities in access to education and resources. Administrators faced organizational chaos. Amidst this upheaval, they were also compelled to navigate uncharted territory and forge new pathways for teaching, learning, and support.

The special education administrative teams in this study encountered stressors unique to this period, fundamentally altering their approach to education delivery and management. The shift to remote learning demanded rapid adaptation to ensure students with disabilities received quality education through online platforms while maintaining effective communication and collaboration amidst evolving health guidelines and policies. In alignment with many other districts, ABC school district conducted the entirety of the school year via virtual platforms, utilizing Zoom for meetings and instruction. It is from the interviews and reflective conversations that I sought to gain a deeper understanding on how the pandemic influenced the work and the problem-solving of these teams.

Maintaining Compliance via Zoom

Gem, as the compliance coordinator, shared her grief with trying to navigate the COVID-19 pandemic and conducting IEPs over Zoom. **"**We're in this panic mode right now … the CDE [California Department of Education] is providing guidance around COVID-19, but it isn't …" She paused for a moment: "... we are still held to a standard that would be manageable I think in preCOVID." Exasperated, she questioned, "How do we take notes in the IEP to represent that instruction's happening remotely?" Gem felt that the guidance given by the CDE lacked any "real guidance" and that districts had to "figure it out [how to do IEPs and teach] on their own." This sentiment was shared by Alma, who noted that the "district has over 1,000 overdue IEPs, so there's a lot of focus on that now. But it's hard to do IEPs right now ... sometimes I don't know what to tell people." The program specialists noticed a similar difficulty when it came to conducting IEPs over Zoom. Armando touched on such challenges, noting, **"**How do we do IEP meetings? How do we do Zoom? … We had to figure out on our own how to do IEP meetings via Zoom on our own." He also noted that "not much help" was given on what the structure of a Zoom IEP should be or look like.

Adapting to Remote Learning

Beyond their concerns regarding compliance, the special education administrators faced additional stressors tied to delivering instruction to students with disabilities through Zoom. Sandy observed, "For distance learning, everyone that I talked to had to reinvent the wheel." Blair and Paula had more emotional reactions to not being able to assist teachers with their instruction and shifting to online learning during COVID. Blair shared how she felt "useless" during the shift to online learning as she couldn't assist the teachers she managed. "You have to balance all that as a human as well as people being like help me help me help me help me help me, and you're like I can't give that to you right now," she said. Paula conveyed her sense of being left out of the decision-making process concerning the adoption of distance learning, which, in turn, hindered her ability to assist others effectively. She said, "No one thought about what it was going to be, how is it going to be, how do we all ... answer to the people that answer to us."

Beyond general concerns regarding remote learning, student engagement was highlighted as a particular challenge for the team and teachers during the pandemic. Sandy noted that preschool students were particularly challenged during this time because they need "constant attention." She brought up that a significant portion of the time during the weekly preschool meeting she conducted was focused on the subject of "engaging students and parents." She stated that teachers had to "train parents to be teachers … that way they know that the parents know what to do and how to engage them [the student] and how to work with them." Gem also highlighted the difficulties encountered when it came to student engagement and participation during remote learning. "How do you consider student engagement on Zoom? With distance learning, we have students who may or may not be in attendance … and it's very difficult to provide guidance via a Zoom meeting." Blair also noted the importance of student engagement via Zoom and teachers needing more assistance around this: "student engagement has been brought up." But she also acknowledged that "I sometimes don't know how to help" because instruction looked "so different now." Faced with instructional difficulties and persistent student absenteeism, Rose mentioned that her responsibility was to support teachers in enhancing their online teaching. However, she acknowledged the challenge: "One of the biggest challenges during the pandemic was figuring out how to provide effective PD remotely. We had to get creative with our approach." However, she did not detail what she meant by a "creative

approach." Professional development, led by Rose and other program specialists, was seen as the "best way" to support teachers during this time.

Mitigating Isolation

Interestingly, I had anticipated that the theme of *team development over Zoom* would have been a more prominent topic among the participants, especially discussing the challenges of not being able to interact with colleagues in person during such a challenging period. However, only two program specialists brought up this challenge. Blair observed that the transition to virtual meetings took some adjustment. She noted, "It took a while for people to find their rhythm and get comfortable with being on camera and figuring out their workspace." However, she didn't see this as a real obstacle to team development or their work because she believed that the program specialist group was "tight-knit." Steven, unsurprisingly, as the newcomer to the team, experienced a sense of isolation when interacting with his colleagues through Zoom. Steven remarked, "It is a little bit more difficult to do everything over Zoom because I have ... never met any of my coworkers in person." However, outside of this comment, he did not add any specifics on why being on Zoom made his work "more difficult."

Analysis of Interviews and Reflective Conversations

The interviews and reflective conversations with the special education administrators in the ABC school district unveiled significant challenges, revealing a complex educational landscape characterized by feelings of powerlessness, bureaucratic constraints, and the struggle between compliance and pedagogical needs. Expressing a profound sense of powerlessness, administrators cited systemic barriers and teacher resistance, often shielded by the union, as major hindrances to implementing initiatives aimed at improving inclusivity and teaching quality. The program specialists described feeling overwhelmed by responsibilities, especially managing IEPs and ensuring compliance, amidst staffing shortages and administrative burdens, exacerbated by the transition to remote work during the pandemic. This overwhelming workload, coupled with a perceived lack of support from upper management, led to feelings of underappreciation and frustration, prompting some administrators to consider leaving the district.

The bureaucratic environment stifled creativity and risk-taking, impeding innovative problem-solving and decision-making, despite the recognition of the need for program specialists to become proactive problem solvers. The hierarchical decision-making structure and fear of reprimand for independent action further constrained administrators' autonomy and initiative, hindering their ability to address the diverse and evolving needs of students with disabilities effectively. This paradoxical situation underscores the urgent need for systemic changes that strike a balance between procedural oversight and flexibility to foster adaptive and responsive action in special education.

One might expect that discussions with the participants would primarily focus on navigating the challenges brought about by the pandemic due to the disruption of their teams' daily routines. It is in the midst of such crisis that established routines reveal themselves, and they can either withstand the crisis and chaos, or they can wither, making room for new approaches that are better suited for the urgencies at hand. However, the pandemic was only marginally discussed and was often introduced by me during interviews and reflective conversations. This unexpected silence on the pandemic might hint at the team's unintentional effort to stick to what's familiar. They seem to be holding onto their established organizational culture and "safe" routines, perhaps not fully realizing that this defensive stance could be more of a reflex than an effective strategy.

Weekly Meetings and Participant Reflections

This study seeks to understand how special education administrative teams in the ABC school district navigate the intricate landscape of special education alongside the challenges presented by the COVID-19 pandemic, and how these factors influence their work and problem-solving strategies. The findings below present descriptions and analyses of the interaction dynamics of two main special education administrative groups for the district: the director and coordinators and the program specialists, the coordinators, and at times, the director. Though each group is considered special education administration, each group had a unique function within the district, with the director and coordinators being the highest level of administration for special education—just under the district superintendent and assistant/associate superintendents—and with the program specialists acting as middle managers between the director and coordinators and the special education teachers at individual school sites. As such, each group spent their meeting times differently when it came to engaging with special education problems.

Director/coordinators weekly meetings

From November to June of the 2020–2021 school year, I joined the director and coordinators for their weekly team meetings. I stayed for the entire length of the meetings unless explicitly asked to leave, such as when the teams discussed sensitive student matters, which occurred twice. The director/coordinators meetings consisted of three main actors: Paula, the special education director; Gem, the compliance coordinator; and Alma, the programs coordinator. No program specialists were a part of these meetings, and team meetings would be canceled if Paula could not attend. This team regularly convened on Zoom every Wednesday morning, with meetings typically lasting 1 hour and 25 minutes on average. However, the duration varied, ranging from a minimum of 51 minutes to a maximum of 1 hour and 37 minutes. I was invited to join them to gain a better understanding of their work and be a thought partner when asked. Table 6 displays how the team spent their time across the 18 total meetings based on the four categories described in the methods sections. Out of a total of 159 episodes, zero episodes pertained to intentional team building activities, 49 episodes related to side conversations (an average of 2.7 episodes per meeting), 33 episodes related to information giving or receiving (an average of 1.8 episodes per meeting), and 77 episodes pertained to problem-solving (an average of 4.2 episodes per meeting).

Table 6

Number of Episodes and Episode Categorization for the Director/Coordinators Meetings

Meeting #	# of TB episodes	% of time TB	# of SC episodes	% of time SC	# of IR episodes	% of time IR	# of PS episodes	% of time PS	Total episode #
1	0	0%	3	30%	1	10%	6	60%	10
2	0	0%	2	25%	2	25%	4	50%	8
3	0	0%	2	22%	1	11%	6	66%	9
4	0	0%	4	40%	4	40%	2	20%	10
5	0	0%	3	33%	2	22%	4	44%	9

6	0	0%	1	11%	3	33%	5	55%	9
7	0	0%	3	37.5%	1	12.5%	4	50%	8
8	0	0%	2	33%	2	33%	2	33%	6
9	0	0%	2	25%	3	37.5%	3	37.5%	8
10	0	0%	3	33%	2	22%	4	45%	9
11	0	0%	3	43%	0	0%	4	57%	7
12	0	0%	5	45.5%	1	9%	5	45.5%	11
13	0	0%	3	37.5%	2	.25%	3	37.5%	8
14	0	0%	4	36%	3	28%	4	36%	11
15	0	0%	1	16%	1	16%%	4	66%	6
16	0	0%	3	27%	2	18%	6	55%	11
17	0	0%	3	33%	1	11%	5	55%	9
18	0	0%	2	20%	2	20%	6	60%	10
Totals	0		49		33		77		159
Ave	0	0%	2.7	30.8%	1.8	20.7%	4.2	48.5%	

Note. TB = team building, SC = side conversations, IR = information receiving, and PS = problem-solving. Percentages of time may not be exactly 100 due to rounding errors.

During the initial phase of the study, from October to December 2020, I engaged in interviews and reflective discussions with Paula, Gem, and Alma. The aim of these conversations was to develop a deeper understanding of the dynamics and proceedings of the director/coordinator meetings by inquiring about the actors' motives and interpretations and to identify the team's key priorities during these gatherings. Although there were some variations in the team's perspectives regarding their meeting time, there was a general consensus aligning with Alma's observations, which were reflective of the data presented in the table outlining how the team allocates their time.

> So, it's information from [Paula], [then] what we need to get done, [what's] going to have an effect long term, then we'll definitely talk about any issues with parents, with program specialists, or anything that we need to be aware of right now that we need to change immediately. Then we chat, we always like to chat.

As seen in table 6, the director and coordinator team rarely engaged in singular information receiving and giving episodes, with the average time spent on information receiving being 20.7 percent, and the average time spent on problem-solving 48.5 percent. This is due in part, because the team would often begin problem-solving episodes with information to give context to the issue at hand. For example, when Paula would ask for an update on the backlog of student evaluations and assessments for their triennial IEPs—the triennial review is done every three years to assess whether the current IEP is effective and to determine if the student still qualifies for special education services, which is typically done through academic and

psychological testing, Gem would begin with an update. This update would include such information as how many students still need evaluations, how many students have outstanding evaluations, who is to conduct the evaluation, and when. With the context given, the team would discuss the issue brought forth, which in this case was student evaluations and overdue IEPs—those IEPs that have not been completed by the annual due date—and how student evaluations are a large part of this bigger issue. Often, when a team member engaged in information sharing, there was an intention to problem solve around the topic introduced as seen in the example above. If the team member initiating the exchange of information didn't intend to transition the discussion into problem-solving mode, it was classified as an information-receiving episode, even if it occasionally evolved into problem-solving, a less common occurrence for the director/coordinator team.

As the highest level of administration for special education in the district, it is not surprising that the team would spend the bulk of their time on problem-solving either immediate urgencies (e.g., mediating a personnel or parental concern) or longer-term issues (e.g., development of inclusion classes for students with extensive support needs). Often, the team would construct their agendas around the various issues and problems faced by the district. For example, one agenda for the director/coordinators meeting consisted of overdue IEPs, scheduling inclusive classes for high schoolers with disabilities, sharing information regarding a new school board member, completing the backlog of student evaluations for IEPs, developing a special education handbook, and constructing the agenda for the upcoming program specialists meeting. As Paula noted, “We are, theoretically, the biggest minds of the district. We got to these positions, and it is our job to problem solve these issues.”

Given that effective problem-solving requires psychological safety, it is notable that the director and coordinator team did not engage in deliberate team-building activities. Rather the team used “side conversations” to build rapport and trust, especially during the pandemic when teams were isolated physically from each other. Paula, when reflecting on how to best prioritize their team’s time, expressed that side conversations “feel like building a rapport or relationships” with Gem and Alma as they are her “right-hand women.” Alma agreed: when she says that “we always like to chat.” Chatting or side conversations ranged anywhere from short exchanges such as wishing a team member a happy birthday to lengthier conversations regarding health concerns. Considering the team's high level of isolation during the pandemic, with Zoom meetings being their sole means of connection and communication, it's evident that informal communication was valued by the team. This likely played a role in fostering team cohesion and maintaining a positive work atmosphere. This aspect, although not explicitly quantified in table 6 in terms of intentional team-building, might be an underlying factor that facilitates effective information exchange and problem-solving, reinforcing the importance of balancing structured and informal interactions in the director and coordinators meetings. Though this balance does make for a very ineffective use of time.

Program specialists weekly meetings

From January to June of the 2020–2021 school year, I joined the program specialists for their weekly team meetings. I joined the program specialists meetings for the entire length, and I was never asked to leave such meetings by participants. However, I was not invited to a weekly meeting known as “hot cases” where the program specialists spoke to the coordinators about particularly litigious or challenging student and family cases.

The program specialists meetings consisted of nine main actors: Paula, the special education director; Gem, the compliance coordinator; Alma, the program coordinator; Aiyana,

the program specialist for nonpublic schools; Rose, the program specialist for the district's professional development regarding special education; Sandy, the program specialist for all preschool programs; Steven, the program specialist over all high schools; and Armando and Blair, both program specialists for elementary and middle schools (K-8). This team regularly convened on Zoom every Friday morning, with meetings typically lasting 1 hour and 46 minutes on average, with meeting lengths ranging from a minimum of 30 minutes to a maximum of 3 hours and nine minutes.

Upon working with the director and coordinator team for two months, Paula was open to me joining the program specialists meeting to see where my expertise might be beneficial and to better understand the work, priorities, and problems that the program specialists faced. Table 7 displays how the team spent their time across the 19 total meetings based on the four categories described in the methods sections. Out of a total of 168 episodes, 17 episodes pertained to intentional team-building activities (an average of .89 episodes per meeting), 51 episodes related to side conversations (an average of 2.68 episodes per meeting), 71 episodes related to information receiving (an average of 3.73 episodes per meeting), and 29 episodes pertained to problem-solving (an average of 1.52 episodes per meeting).

Table 7

Number of Episodes and Episode Categorization for the Program Specialists Meetings

Meeting #	# of TB episodes	% of time TB	# of SC episodes	% of time SC	# of IR episodes	% of time IR	# of PS episodes	% of time PS	Total episode #
1	1	11%	3	33%	3	33%	2	22%	9
2	1	14.2%	2	28.5%	3	42.8%	1	14.2%	7
3	1	9%	3	27%	5	45%	2	18%	11
4	1	11%	4	44%	3	33%	2	22%	9
5	1	9%	4	36%	5	45%	1	9%	11
6	1	9%	2	18%	6	54.5%	2	18%	11
7	1	10%	3	30%	4	40%	2	20%	10
8	1	11%	3	33%	4	44%	1	11%	9
9	1	12.5%	3	37.5%	3	37.5%	1	12.5%	8
10	1	9%	4	44%	4	44%	2	18%	11
11	1	11%	2	22%	4	44%	2	22%	9
12	1	14%	1	14%	4	57%	1	14%	7
13	1	20%	2	40%	1	20%	1	20%	5
14	1	11%	2	22%	4	44%	2	22%	9
15	1	12.5%	3	37.5%	2	25%	2	25%	8

16	1	9%	3	27%	5	45%	2	18%	11
17	0	0%	2	33%	3	50%	1	17%	6
18	1	11%	4	44%	3	33%	1	11%	9
19	0	0%	1	14%	5	71%	1	14%	7
Totals	17		51		71		29		168
Ave	.89	10%	2.68	30%	3.73	42%	1.52	17%	

Note. TB = team building, SC = side conversations, IR = information receiving, and PS = problem-solving. Percentages of time may not be exactly 100 due to rounding errors.

As seen in table 7, a large percentage of time, 42 percent, was spent on information-receiving episodes during the weekly meetings. This is in large part due to the fact that the program specialists meeting agendas were often constructed during the weekly director/coordinators meetings. As Alma noted, one of the main objectives for the director/coordinators meetings was "first, to get any information [from Paula] that Gem and I need to send out to the program specialists." The hierarchical structure and bureaucratic nature of the special education environment is evident, as there is an emphasis placed on "messaging" and communicating the "same message" to the program specialists, who in turn, relay that information to the teachers and schools they support.

Having spent January and February attending the weekly meetings of the program specialists and observing their structure and management, I chose to seek the program specialists' perspectives on these meetings. My goal was to determine if there was a consensus between the directors, coordinators, and the program specialists regarding how the program specialists meetings are and should be conducted. With that, I interviewed four out of the six program specialists as Rose and Aiyana declined to be formally interviewed.

When asked for their thoughts on the program specialists meetings, a consistent throughline emerged: "Being on the same page." Armando felt the team was moving in the right direction as a team "with Gem and Alma leading, we are taking the time at the beginning of the meeting to go over the basics. Just talk at me, give me the information that I need to disseminate [to the schools]." Blair seconded this notion: "We started doing that, and it's working well [sharing information]. Because … then we talk about exactly what we're going to say to the teachers and make sure that we're on the same page." Sandy conveyed that despite her unique position as the preschool program specialist, she often discussed "general situations" in meetings. She does this knowing "that chances are they [the other program specialists] will want to hear that straight answer from Paula."

While the team acknowledged the significance of receiving information, the program specialists expressed a desire to increase time spent on discussing and solving challenges related to special education in their district and individual school sites. As can be seen in table 7, little time was dedicated to problem-solving, with 17 percent of episodes pertaining to problem-solving. Armando shared that when the program specialists meetings "were all Paula driven, and it was all like just talk, talk, talk, and I felt like we [the program specialists] didn't have a voice. That's changing with Gem and Alma leading … we are having more of a voice." Blair and Steven shared this sentiment and suggested that the team's time should be spent on longer-term

goal setting. Blair was both skeptical and hopeful that the program specialists meetings could be a space in which to do this.

> I think in a program specialist meeting, us talking about the "why" [a problem is occurring]. Maybe pulling some data; and again, I just want to know that I'm on the same page as the coordinators, as my peers, and as Paula. But I just don't feel like we're making the best use of our time. I feel like it's been brought up, and nothing's come of it [using the program specialist meeting time more effectively]. I feel I'm to the point where I don't even want to try. But hopefully … we can plan for things that we can do next year, some goal setting. I feel pretty hopeful for next year, just not for this current school year.

Despite the team's entrenched focus on bureaucracy and hierarchy, prioritizing clear communication and maintaining consistency in messaging became even more imperative. The upheavals caused by the pandemic should have urged the team to place greater emphasis on addressing the pedagogical requirements of students with disabilities and providing support to teachers. However, despite the program specialists' expressed desire for more involvement in this aspect, opportunities for engagement were not pursued during their meetings. Instead, instances of improvisation and pedagogical discussions with teachers typically occurred during special education department meetings at the school site, overseen by the program specialists.

Regardless of the incorporation of deliberate team-building activities, accounting for 10 percent of the total meeting time, and side conversations, which comprised 30 percent of the overall duration across the 19 meetings (refer to table 7), and perhaps served a purpose akin to those in the director and coordinators meetings for rapport-building, especially during the pandemic when the team members were isolated from one another and only had time for small talk and chit chat during the Zoom meetings,I observed that the program specialists became notably more reserved when Paula was in attendance. I noted in a journal that the program specialists were often silent and needed to be "cold called" by Paula to participate.

Steven, who was newly hired the year this study took place, supported my observations when he noted that there are "a lot of silences" during the meetings. As he was "still learning" and "didn't want to step on people's toes" he often remained quiet, mirroring the team's overall communication dynamic. Even Armando, Blair, and Sandy mentioned that they "lacked a voice" during meetings. With that, I decided to ask Paula about this in one of our reflective conversations. Paula let out a sigh and expressed her frustration to me.

> You have seen me, I get frustrated because whether they're [the program specialists] afraid, they don't want to throw out ideas. I can't be the generator of every idea. Not only do I not have a buy-in for it, but I don't have the capacity myself. It just can't be that way. But it's been a struggle for me to try to feel like building a rapport or relationship for people to feel like they have some kind of voice in being able to express difference of opinion. I do feel like I'm open. I do feel like I'm asking for opinions and open to different thoughts, but I get nothing back. And then I get frustrated, and then it's like I don't have time if you're not going to talk. There's some work to be done.

Considering the team's strained relationship with Paula, it makes sense that the program specialists meetings would incorporate team-building exercises. This inclination was echoed by Rose, who mentioned in a team meeting, "Paula asked me to do this [the icebreaker activity] to build the team up." Despite both deliberate (i.e., team-building activities, icebreakers) and incidental efforts (i.e., side conversations) at fostering relationships between the program specialists and Paula, Gem and Alma still had to serve as intermediaries between the two groups.

This was due to, as Sandy noted, the program specialists feeling more "comfortable" and "open" when interacting with the two coordinators.

Team Interactions

As this study aims to identify how special education administrators solve problems within an often-overwhelming special education context that frames and defines their actions, explaining the subtleties and complexities of the teams' interactions becomes crucial. To achieve this, in the first section, I sought to understand from interview data, how the special education context influenced the team members. Then I provided an overall understanding of how the teams spent their time during their respective meetings, including the percentage of time dedicated to team building, side conversations, receiving information, and problem-solving activities as seen above. Now, with an overall understanding of how the teams spent their time, the subsequent findings offer a thorough examination of the teams' interactions, focusing on communication dynamics and cognitive and emotional processes. Firstly, I will analyze the categories listed above—intentional team building, information receiving, side conversations, and problem-solving—to demonstrate aspects related to communication. Next, I will conduct a detailed analysis of two complete meetings to unveil the cognitive and emotional dynamics.

Interactions by Category

As noted above, to grasp the communication dynamics of the team, it's essential to delve deeper into the understanding of the four categories—team building, side conversations, problem-solving, and information receiving—outlined in the "weekly team meeting" section of this study. This deeper understanding allows for a comprehensive analysis of how communication patterns influenced the teams' cohesion, decision-making processes, and overall effectiveness during meetings. For the two teams (i.e., program specialists and director/coordinators), I demonstrate how the four categories are represented during their meetings. Much like the section above, the findings below are split by director/coordinators' meetings and the program specialists' meetings. For each category, I present a few key narratives from meeting events over the course of the school year which are representative of that category.

Intentional Team Building Interactions

Program Specialists Meeting 2/12/2021

The team gathered on Zoom for their weekly Friday morning meeting. Alma welcomed the team to the meeting stating, "We do have an icebreaker for today, thanks to Ms. Rose. What's a habit you have picked up during quarantine?" Sandy chimed in first, "I feel like I eat more chocolate now. I've got my stash right there!" Alma laughed, "You need to eat a meal, girl" and Paula joked, "a sandwich." Rose piped in that she wanted "half" of the sandwich, and that she got "an iRobot [a robot vacuum] since we've been in quarantine, and I am obsessed." Paula joked that she talks to hers "like it's my pet." The team proceeded to share stories about their robot vacuums getting "caught" on furniture. Alma then said, "Steven?" This prompted Steven to share "buying crap that I don't need online." Armando then looked around and said, "Am I left? I don't think I have developed any new, or bad, or good habits." Rose laughed and asked him, "You haven't perfected the margarita making?" Armando quipped, "Now, that's not a habit, that's a way of life." The team laughed, and many nodded their heads in agreement. Alma then shared, that she "got into Color Streak nail strips." Paula chuckled and asked, "like a wallpaper type-thing that you just apply [to the nail]?" Alma affirmed this with a quick laugh and "mmm hmmm." With all members of the team sharing their quarantine habits, Alma moved the team onto their next agenda item.

Program Specialists Meeting 5/14/2021

Once all the team members entered the Zoom room for the team's weekly meeting, Alma got the team started with a round of "kudos." Alma began with her kudos, "To Blair for jumping in at the last minute to cover an IEP at 8 this morning." Blair nodded her head in acknowledgement of the statement. Paula then chimed in,

> I feel like a broken record, but really just kudos to all the program specialists who are doing your job as well as helping at school sites and/or helping somebody else do something else, and opening school sites [during COVID], and all of you, I know how much you're doing. I appreciate it.

Alma then noted how Sandy got all the "ESY [extended school year; summer school for students with disabilities to support the retention of academic and social skills] dates of kids that don't have ESY on their IEP yet." Paula nodded her head in understanding and then gave some kudos to all of the program specialists again, noting "you guys are all doing your job on making overdue IEPs important."

Rose then gave kudos to Paula for supporting her with "some personal stuff, and it's nice to be able to reach out to somebody." Holding her right hand to heart, Paula stated, "anytime for anyone." Armando then praised the transportation department who bus students to and from schools for their "flexibility" as they navigated the schools reopening amidst the COVID pandemic. Paula seconded this, letting Armando know that she would pass his acknowledgment to the heads of the transportation department. Paula then shifted to their next agenda item.

Side Conversations Interactions

Director/coordinators meeting 12/9/2020

Paula, Gem, and Alma gathered for their weekly Zoom meeting. Paula started the meeting by saying she had "hot stuff." Paula clarified this statement by noting that she had canceled the program specialists meeting for that upcoming Friday, so "that people could go to the WJ [Woodcock Johnson; a test of cognitive abilities] training." Gem and Alma agreed with this decision. Paula, looking at Alma, then stated, "All right. I can't help it; nice glasses, Alma. Those are new." Alma giggled and said, "They're *huge*." Gem agreed and added, "Yeah, those are fun," with Paula pointing out that "they're Elton Johnish." Gem asked Alma where she got them from, prompting Alma to answer, "It was one of those ads that pop up on Instagram" and she wanted to see if "it was a scam." She concluded saying, it "obviously wasn't a scam," and that she wasn't ready for how "huge they were." Paula then wrapped this side conversation stating, "The better to see you with, my dear. All right, so what do you guys have that is within 15 minutes of Gem's meeting?"

Program Specialists Meeting 6/17/2021

Toward the end of the meeting, the team was waiting for Paula to join them to discuss items for the summer and for the next school year. Alma noted that Paula, "should be joining soon," and she thought she was "on the phone." She followed this with: "if you guys didn't know, I bought a house. I had to share; I'm super excited." Gem congratulated Alma asking, "Did you get it locally [close to ABC district]?" Alma eagerly nodded her head yes, "Eight minutes away. I'll be right by [a district school]." The team shared their congratulations and excitement with Alma. She thanked the team and proceeded to tell them, "The only thing that worries me, Blair, is the bike [her stationary exercise bike]. How am I gonna move the bike? It's so freaking heavy." Armando quipped, "Pretend there's a defect, and it has to be recalled." Alma scoffed, "It took like three months for them to deliver the bike." Alma then shared where she would place her exercise bike in her new home, either up or downstairs, with Blair laughing, "It's going to be hard to get that upstairs. When mine [Blair's exercise bike] was delivered, I

thought the guy would break his neck bringing it upstairs. I am just watching waiting for it to happen." After this comment, there was a short lull in the conversation, which prompted Blair to ask "So, … are we just here waiting on Paula? Like, I mean, no shade to anybody. Like, I love you all, but …" This comment effectively ended the side conversation with Gem noticing Blair's eagerness to wrap up the meeting and subsequently introducing a new agenda item about virtual study.

Information Receiving Interactions

Director/Coordinators Meeting 2/17/2021

Towards the end of the meeting, Alma noted that she wanted to discuss a topic that was not the agenda but was relevant to the team. Alma proceeded to share that a speech and language pathologist (Mitzy), "complained" that she had "like 50-something assessments or requests for assessments right now." Alma detailed that Mitzy had to take over "Spanish ones [assessments]" as well, leading to Mitzy "feeling overwhelmed." Alma noted that she told Mitzy to "just use an interpreter" for the Spanish assessments and "prioritize and go down the list" of students who needed assessments. She then said, "okay, I think that's it for that," ending this information-receiving episode.

Program Specialists Meeting 3/5/2021

Near the end of the program specialists meeting with everyone in attendance, Paula broached the subject of returning to the office during the COVID pandemic. She began the information session by stating:

> I want us to start getting ready. I mean, it's obvious we have to come back [to the office] at some point. No one's giving us a day. It's not that we have to come back tomorrow, or we're gonna come back next week. Or heck, we don't even know if we have to come back next month. But we will have to come back, and I would say that we need to start preparing ourselves for things sooner rather than later.

As Paula continued, most of the program specialists placed their microphones on mute, with one, Steven, turning off his camera. Paula shared, "We also feel in cabinet that it's important to bring back our staff before we reopen with kids … before we try to get all the public onboard with some of these systems." She went on to state that she wanted the team "to start thinking about it [returning to the office] as she needed to "start ordering equipment" and other items for the office. Paula took a brief pause, but when no one spoke up, she continued to detail how the return to the office could work. "Now, a couple of easy gives would be Sandy would stay in her office [at the preschool office], so that you're not causing more infiltration at the district office." Sandy nodded her head in acknowledgement. Paula went on, "Aiyana could stay at Jefferson [a nonpublic school] and that gives more space." Aiyana silently acknowledged Paula with a nod. Another short silence occurred. Then Paula chirped, "Anyway, I don't have a plan," and that this "is a conversation that we're having at the cabinet level." But there is "no need for everybody to panic, but we need to mentally prepare everybody to say it might be before the end of the school year." She also noted that if there is an "individual situation" to contact HR. Paula furthered the information-receiving episode by posing the following: "So, with that, any questions, or comments, concerns that I should be thinking through?"

Another silence occurred before Aiyana requested a printer for her office location, to which Paula quickly agreed and asked Rose to "make a list of those kinds of things [items needed to come back to the office safely]." This prompted another question by Aiyana regarding outfitting the schools with plexiglass. Paula proceeded to detail a "reopening checklist," which included items regarding checking the heating and air conditioning systems, "spreading out"

administrators so there “aren’t crowded office space,” but that she was “not as worried about us in offices.” Paula went on to share her plan for the office. “my first thought is that I would rotate days where people come in for two days, and then it's [the office] cleaned, then the next group would come in … Any questions, comments, concerns? Complaints?” Following a short silence, Paula acknowledged the stress felt by the program specialists, “I know it's not fun to think about coming back, but it is going to be reality.” Another silence occurred before Alma wrapped the information-receiving episode, stating, “So, I think there was nothing else left on the agenda.”

Problem-Solving Interactions

Director/Coordinators Meeting 1/14/2021

This problem-solving episode pertains to school psychologists, whose jobs it is to conduct assessments: administering various tests and evaluations to identify students' strengths, weaknesses, and any potential disabilities or learning disorders affecting their cognitive abilities, academic skills, and social-emotional functioning. Based on such assessments, school psychologists then generate reports that can influence the services students receive and their eligibility for special education. Considering the significant impact of these evaluations and reports, it was crucial for the team to ensure their quality and accuracy. As such, this problem-solving episode begins with Paula presenting the findings of a report, provided by David, a consultant hired by the district, concerning the district's school psychologists and their proficiency in evaluating cognitive disabilities as well as the quality of their assessment reports.

The report revealed several problems, such as the absence of a standardized template for documenting assessment results and diagnoses; the failure of school psychologists to assess all areas of disability (like speech, language, and cognitive skills) due to the lack of a uniform set of tests for the district; and the reports being indefensible owing to insufficient detail or "finesse." Following her presentation of these findings, Paula invited Gem and Alma to offer their thoughts and potential solutions for these issues, including whether the district should engage David's services to address these shortcomings.

Gem didn’t hesitate to offer her “reservations.” She cited one of the current school psychologists who worked with David in a different school district, and “there's some baggage about the way in which his [David’s] work impacted the psychologists in [the other district.” Gem continued to detail her reservation:

> In David’s proposal, he talks about consultation and signing up for work meetings with a whole bunch of people. I think that's kind of our job, frankly. I think we need to be more engaged and involved in this process, and I don't want to just outsource it.
>
> So that's one of my questions and concerns.

Paula agreed and invited Gem to talk more about being “engaged in the process.” Gem stated, “I'm thinking specifically of developing the assessments.” She pointed out to the team that, rather than employing David to do this, the team “could go about this in a different way and call all of the directors [of special education] we know around the state.” Then Gem positioned that the team could, “Pick and choose different psych[ology] templates, analyze the components internally, maybe with his [David’s] consultation. Like bringing it internal and working with our folks and develop a relationship with our people that isn't outsourcing that relationship.” After a short pause to gather her thoughts, Gem continued: “I know there's been struggles with the psychologists, and I think assigning someone else to handle that may not be the best next step to kind of building our capacity as it were.” Paula nodded her head in agreement and suggested they needed to get “the buy-in of the group [the school psychologists].” Alma and Gem quickly agreed with Gem noting, “I think it would be helpful to have his consultation and like one or two

psychologists, sort of in a think tank." Alma then added that the team needed to provide specific professional development to the school psychologists on how to assess students for "emotional disabilities."

This shifted the conversation with Gem mentioning that David wanted to "develop an evaluation tool for school sites," but that the union "ain't gonna be buying a new evaluation for school psychologists any time soon." Alma slowly nodded her head in agreement. Paula picked up on both Alma's and Gem's suggestions stating, "We've got to figure out how to foster them [the school psychologists] to believe they [the school psychologists] need it, them [the school psychologists] wanting to make change, and them [the school psychologists] having a part in making that change." Paula offered the suggestion of forming "work groups." These work groups would focus on developing "a standard template, standard battery of tests, and PD [professional development]" for the school psychologists. Paula also noted that these work groups were born from her "first attempt" to provide the school psychologists with a template, which she brought from the district where she used to work. However, when the school "poo-pooed" the idea, Paula began considering these work groups more seriously, realizing that she will have to "let them [the school psychologists] come up with something." Gem agreed that the team needed to "build trust and empower" the school psychologists "to be the professionals that I think they are," which meant allowing them to "go out" and "research" and "take the ownership of it." Paula quickly chimed in saying, "I absolutely agree." Looking at her watch, Paula said, "right, so anyway, let's go on." After discussing these issues, and with the ideas of workgroups set as a possible solution, the team moved on to other agenda items. This was the final instance in which they tackled the problems highlighted by the report and the potential use of working groups to empower the school psychologists to implement any necessary changes.

Program Specialists Meeting 3/5/2021

In a previous meeting, Gem, Alma, and Paula deliberated over concerns arising from unfinished evaluations conducted by the school psychologists and speech and language pathologists. They particularly noted that these incomplete assessments were resulting in overdue IEPs and, consequently, students not receiving the necessary services promptly. Gem, Paula, and Alma decided to open a space in an upcoming program specialists meeting to discuss any issues related to assessments to get a better sense of "what's happening on the ground" as Gem put it. As such, Alma asked the group if they had any questions regarding assessments from either speech and language pathologists or school psychologists.

After a silence lasting about 45 seconds, Blair said she had a "random complaint" coming from a speech pathologist. She detailed that the speech pathologist said they have "to order their own protocols." Paula, exasperated, stated, "They [speech pathologists] want to act like it's something I'm doing to them. The fact is we don't have a standard." Armando then asked what "protocols are being used?" Paula, visibly frustrated, stated, "They all have their own kits [protocols], and we don't know what they are. The past practice is [to] order your own protocols because I don't know what fricking kits you have because it's not a standard battery." Paula vented to the group, "it's just the tone … like somehow [I'm] punishing them, and it's like, no." Paula continued, "I'm happy to order something, but I've got to know what to order." There was a slight lull in the conversation before Blair, empathizing with Paula, offered the following solution. "We should remind them." Blair further explained that the team should use a past survey for this purpose. She detailed that this survey had been sent to the speech pathologists to understand which protocols they used and then to store this information "at the district level," with "most" of the speech pathologists filling out the survey. Blair then asked, "can we give it

[the survey] to them again?" Visibly brightening, Paula replied, "Yes! I will have [Alma] send it to you guys." With the solution set in place to remind the speech pathologists of the protocols they currently use via a survey, the program specialists agreed to send out the survey to those speech pathologists they work alongside. This is the last time the team would discuss this complaint, and there was no follow-up regarding the survey.

Category Analysis

Paula initiated intentional team-building interactions as a response to strained relations between herself and the program specialists, such as activities like kudos and ice breakers, aimed to foster rapport and strengthen the connection between Paula and the program specialists. However, despite allocating time for these activities during meetings, there remained periods of silence and a perceived lack of safety for program specialists to express their opinions or thoughts on topics, even though both Paula and the program specialists expressing a desire for open communication. Side conversations for both teams were likely a consequence of the pandemic, as they could no longer interact face-to-face or have informal discussions outside of meetings. With Zoom meetings becoming the primary means of connection, these side conversations became inevitable and served to combat feelings of isolation during quarantine. However, while beneficial for team cohesion, these side conversations consumed a significant amount of meeting time, reducing efficiency and limiting discussion on other agenda topics.

As seen in the tables above (see tables 6 and 7), the director/coordinators meetings and program specialists meetings diverged when it came to time spent on information receiving and problem-solving. For the director/coordinator team, most information-receiving episodes were rarely self-contained, singular events. Rather, the problem-solving process typically commenced with a team member offering background information about a particular issue which set the stage for subsequent problem-solving discussions. Even in instances where the primary aim of an information-sharing session was to disseminate information, it often evolved into a problem-solving session, triggered by a different team member who would steer the discussion towards addressing an issue raised during the information exchange. Typically, problem-solving occurred with this group, with most of their meeting time spent on such tasks.

The dynamics within the program specialists' team presented a stark contrast. A significant portion of their meeting time was dedicated to information-receiving events (refer to Table Y). This was primarily because the program specialists lacked control over the meeting agenda, which was set by the director/coordinators. The agenda typically involved administrative matters, and the program specialists were expected to implement any solutions proposed by the director/coordinators. Consequently, there was limited opportunity for problem-solving discussions during program specialists meetings. Even when such discussions arose, the program specialists were often hesitant to engage, leading to periods of silence. Operating within a bureaucratic and control-oriented system, the program specialists felt constrained in their ability to initiate problem-solving efforts. They feared repercussions for overstepping their roles or deviating from the established hierarchy, which could result in reprimands from Paula. Despite their reservations, the program specialists found themselves adhering to bureaucratic processes and hierarchy.

The Pandemic

Interestingly, one might have expected that the pandemic would spark creativity and flexibility, leading to a shift in priorities from bureaucracy to improvisation, and from compliance to pedagogy. This could have potentially flattened hierarchical structures as teams adapted to the unique challenges of the time. However, the problems addressed in the teams'

weekly meetings primarily revolved around compliance and other administrative concerns. Issues arising from the pandemic, such as remote learning and conducting IEPs over Zoom, were not prominently discussed. The pandemic only became a main topic of discussion in these team meetings when schools were slated to reopen in April. Even then, the focus was more on sharing information about reopening procedures rather than engaging in problem-solving.

Meeting Flows

Having delved into the team's communication interactions in the section above, I will now analyze two specific meetings—one from the director coordinators' sessions and another from the program specialists' gatherings—to unveil the micro-level cognitive and emotional dynamics within the team, a task achievable only by reviewing meetings in their entirety. These meetings were chosen based on specific criteria: (a) they were not previously analyzed as part of change projects (see below), thereby excluding 14 meetings; and (b) they demonstrated a balanced distribution of episode types—information receiving, team building, side conversations, and problem-solving—evidenced by tables in the "weekly meetings" section. These two meetings were then analyzed using a coding framework (see Appendix D) that took into consideration the following: the cognitive aspects of problem-solving when such an episode is presented in the meeting, the emotional aspects of the meeting episodes, and noting which episodes related to the pandemic (see tables 8 and 9). This will be followed by an analysis of the teams' meetings.

Director/Coordinators Meeting 2/24/2021

Context

The primary focus of this director and coordinators meeting revolved around addressing diverse challenges within the district, particularly concerning three main areas: (a) projections involving the estimation of required teacher hires, adjustments in full-time employment, redistribution of teacher caseloads, and potential removal of positions from specific school sites based on projected student enrollment for the upcoming school year; (b) proposed inclusion policies by a school board member; and (c) transitional kindergarten programs, serving as a link between preschool and kindergarten, and their impact on schools sites and special education teachers. As such, the director and coordinators needed to address several large issues within one meeting. The key participants in this meeting include Paula, the director of special education; Alma, the programs coordinator; and Gem, the compliance coordinator. Following the meeting, a table is presented that includes the type of episodes, shifts in topics, the emotional aspects of the meeting, cognitive aspects pertaining to problem-solving episodes, and whether the episodes were related to the pandemic.

Episode 1. At the beginning of the meeting, Paula noted Alma's absence, stating, "Okay, well right now we don't have Alma. I'm trying to remember if I knew she wasn't coming to the meeting." As the team waited for Alma, Paula shared her lack of motivation but did not specify where it stemmed from, expressing, "I lost motivation last night. I had every intention of like working a little bit later, but didn't," to which Gem empathized, saying, "I completely understand, 100 percent." Alma then entered into the Zoom meeting and apologized for being late noting that she was in a meeting that ran long. Paula reassured her, joking, "It's okay. I was just like, I'm always the one late." Alma then joked that she is usually only late if she is "in a meeting or I need to get my coffee." This led Paula to discuss her recent purchase of a cold brew bottle and health concerns related to coffee intake.

Episode 2. Paula then started the meeting by stating, "So, I think one of the biggest things we have for sure is projections. She noted that "it feels like most things [for the

projected] have to be done by March 15th, and the reason is like it can't be ending the school year without it, right?" She went on to say that the team had to think about "placing teachers into other positions" because there won't be enough students at particular sites. She did not pause before bringing up another issue regarding the elimination of an office manager position. She asked the team their thoughts on this and on what they should do because it might set off a "horrible chain," where those with seniority bump others from their jobs. But before anyone could answer, Paula said, "I want to add [that] I don't think anybody's losing a job; they're maybe losing that particular position, so I'm going to take some time to look at that, and then we can talk."

Alma stated, "Sounds like a plan." Paula, acknowledging Alma, stated that Alma needed to start the ball rolling on the projections by "notifying unions, notifying teachers and staff through a staff meeting, so that everyone kind of hears it at the same time, and then, quickly after that, notifying parents." "Alma then shared that she has a meeting with human resources to go over the projection list "because some students have moved out of district, and they're no longer enrolled with us, just so it's accurate." Paula seconded this plan and asked if Alma knew if anyone else had access to the projects, such as "teachers" or the "program specialists." Alma shook her head no. "No, we are still not telling the program specialist when the projections are shared." Paula, relieved, asked when Alma would share the projections. Alma noted that she "would do it at a meeting, so that they all know at the same time." Paula then asked for Alma to share the projections after the meeting takes place, so she could "review and make sure we know next steps on the plan."

Episode 3. Paula begins the next episode by stating, "A big one [problem] is the TK issue, coming up with a solution to that." She further noted that she had to "talk to [higher-level administrators] because that makes the most sense, and you guys tell me if you think otherwise, that the TK is located at [name of school]." Paula further elaborated that this school would then "become the administrator of that TK program," and "what will change for them is now they'll have IEPs" for TK students. Paula then detailed that "the bigger change is the RSP [resource specialist program], right?" (RSP is an educational program designed to provide specialized support and instruction for students with mild learning disabilities within the general education setting). Paula then shared her own experience to illustrate its impact, stating that this happened to her when she worked in elementary schools as an RSP teacher. "I was like I'm not trained for early childhood; I didn't want to do early childhood. It was a big deal to me …" Alma proposed training for teachers to support TK students with RSP needs, suggesting, "we could also train them ... just so they're not so freaked out about it." Paula expressed the need for negotiation to do this, though she did not state with whom, considering the credentials required for teaching pre-K students. Alma referenced California Department of Education regulations, informing, "Pre-K students can be taught by anybody with a kindergarten credential." Paula then noted that the team should make this "front-and-center" in case they got any pushback from teachers. Alma agreed, saying, "they can have this in their "back pockets just in case." Paula, nodding her head in agreement, then noted, "Okay, all right. That will help us keep going."

Episode 4. Paula shifted in her chair before starting the next episode. She began with "I wanted to share … just so that you know, too." Her tone was notably changed from the prior episodes. It now had more of a sense of urgency and importance to it. Paula continued, "I got a phone call from Dr. Jefferson [a school board member] over the weekend." Gem's eyebrow raised, "Oh yeah, about what?" Paula continued, "Dr. Jefferson wants to write a board policy on

inclusion." Paula expressed her initial enthusiasm for the proposed policy but quickly delved into the intricacies and challenges associated with such an endeavor. "It's not as simple as writing the board policy on inclusion and going okay, well, there we go," she emphasized, her voice tinged with a hint of frustration. She noted that:

> We are not set up right now for systems changes. We have some big fires that we have to sort of settle. And that, once you move to improve … I hate myself saying this, because I'm such an inclusion advocate, but at the same time, I know from [my previous work], the struggles that we had. I don't want to make those mistakes. It requires a mindset change, which this district right now is not anywhere close to that mindset.

She further went on, admitting that, "I'm kind of second-guessing myself." Noting that she both wants an inclusion policy with "support from the school board," but also noting the challenges that make her hesitant to agree to something like this. She then asked for "thoughts" from Gem and Alma. Alma chimed in first, pushing the importance of providing training and support to teachers before implementing any changes. "If we don't do it in steps and giving them that training and that support from the start of what it is, prior to just being we have to do this, we're going to get pushback, and then we're still not going to get anything done," Agreeing with Alma, Gem suggested a more flexible approach, advocating for the board to write a "commitment statement" instead of a rigid policy, noting that, "[A] policy is sort of restrictive when a board can come up with [a] commitment to move it forward in this direction that is short of a board policy." Paula welcomed Gem's suggestion, recognizing the need to set up everything for success before moving forward with any policy changes. She reflected on her past experiences again with inclusion and expressed her desire to avoid repeating past mistakes. "I don't want to go down that rabbit hole," she admitted, acknowledging the complexities of implementing inclusive practices within the district. Paula then ended the episode by asking Gem and Alma: "What else do you guys have that you need to throw on the table?"

Episode 5. Gem and Alma both were silent for a moment, with neither of them offering any other topics for discussion. Paula then began "well, if that's …" before Alma jumped in. Alma said, "Hey did you all hear that Susan [a special education teacher] is retiring?" Gem confirmed, adding, "Yeah, I heard the last day of June or sometime just after school is out." Alma elaborated, "Yeah, she said that this is it." Paula chimed in, "Yeah, that's going to be exciting for her." Alma continued to share Susan's retirement plans which prompted Paula to put forth her own desire to retire, "I'm 10 years away. You guys got to increase your skills because I'm going to retire in 10 years, and you've got to keep going." Alma joked about her own retirement prospects, saying, "I heard a man saying that he's going to die in his classroom, and we can bury him in his little garden. I am going to be like him." Paula laughed at this: "It's like I'm going to die at my desk. Just throw me in the dumpster and bring the chair back in and let everybody fight over my good chair." Gem and Alma both laughed and claimed the chair for their own. Paula wrapped up the conversation, asking, "Okay, guys, anything else?"

Episode 6. Both Gem and Alma noted that they had nothing else to add when Paula inquired about the upcoming program specialists meeting, asking them, "You guys got the program specialist meeting?" Alma expressed that she was "drawing a blank on that for right now." Gem, picking up on this, shared, "I'm going to do a quick reminder to people about records requests [how to request IEPs and other documentation from a student's former district] when they come in and how to work through them because we had a situation come up this week." She emphasized the importance of forwarding requests promptly. "When we get those records requests to forward them immediately to me and [administrative assistant], so that we

can process them in a timely fashion." Paula sought clarification on the timeline: "It's five days?" Gem confirmed. "Five days, yeah, timely equals five days, which is a lot [of time]." Paula agreed, and then asked if there was anything else for the program specialists agenda.

Episode 7. There as a short lull in the conversation before Paula put forth a topic she would like to discuss at the program specialists meeting regarding district nurses who write IEP goals for students with medical ailments. (For example, student will take their needed medication at x time without being told by the teacher to do so). Paula stated, "They [the program specialists] have to start meeting with the nurses because their knowledge of IEPs is all over the place." She noted that the program specialists needed to assist the nurses when writing goals, noting their poor quality. "I've seen some; it was like [student] will have no more than three seizures in a month. Well, [student] can't really control how many she has in a month." Gem and Alma acknowledged this with head nods. Paula continued, mentioning that some nurses in IEP meetings "wanted to do away with [the nursing] goal, and you can't have a service without a goal. So, they [the nurses] don't get that … that like a service is to meet a goal." She further stated, "So, I think the program specialists know this [that a service is to meet a goal], but we need to confirm that they know this, and that they can also reiterate this." Paula stressed the urgency of this topic, and the need for the program specialists to address it.

Episode 8. There was a short lull in the conversation, when Alma put forth her topic for the program specialists meeting. "And I also want to remind them to train everybody [special education teachers] how to do written translations requests [translating a student's IEP from English to their guardian's native language], because I have done a lot this past couple days. I don't feel that that should be my job." Alma noted that she had been complaining to Rose due to an influx of translation requests. Paula asked, "Why are you doing it? Why aren't you just sending it back to them and telling them to do it?" Alma expressed that "it was just easier." Acknowledging the situation, Paula sympathized, noting, "I get it; we all do that." She then asked Gem and Alma, "All right, you guys, anything else? [Gem and Alma shake their heads "no"] No? Okay, have a good day. We'll talk to you soon."

Table 8

Analysis of the Program Specialists Meeting Flow

Meeting Episode #	Episode Type	Topic Shift	Emotional aspects	Cognitive aspects	Pandemic related-topic
1	SC	Start meet	Positivity, Engagement	/	/
2	PS	Haphazard	Directed communication, Centralized decision making, Delegation of tasks	Diffuse problem, Insufficient info, Fuzzy solution, Limited shared understanding, No understanding of Root Causes, No end user consideration, No	/

				monitoring of solution.	
3	PS	Haphazard	Cooperative problem solving, Collaboration, Lament, Externalization	Diffuse problem, Insufficient info, Fuzzy solution, Limited shared understanding, No end user consideration, No monitoring of solution	/
4	PS	Haphazard	Lament, Externalize, Limited locus of control, Demoralized, Cooperative problem solving, Collaboration	Diffuse problem, Insufficient info, Fuzzy solution, Limited shared understanding	/
5	SC	Haphazard	Positivity, Engagement	/	/
6	IR	Haphazard	Engagement, Empowerment	/	/
7	IR	Haphazard	Centralized decision making, Directed communication, Lament, Externalize	/	/
8	IR	Haphazard	Demoralized, Lament	/	/

Note. TB = team building, SC = side conversations, IR = information receiving, and PS = problem-solving. The symbol "/" means that the category is not applicable to meeting episode.

Program Specialists Meeting 5/7/2021

Context

As this meeting of program specialists is happening later in the academic year, some schools in the ABC district have started reopening during the pandemic. In this context, program specialists, along with the director and coordinators, have taken on additional duties beyond their usual roles. They were tasked with supporting a specific school site and its principal. This required the special education administrators to be on-site, aiding the principal as needed.

However, no specific roles, responsibilities, or expectations were formally outlined for these special education administrators in their capacity at the school site. It was left to them and the principals to determine the nature of their support. Consequently, this often resulted in program specialists, coordinators, and the director managing all aspects of special education, including student transportation, overseeing IEP meetings, and communicating with parents. As such, at this particular meeting, there was an emphasis placed on being responsive to and supportive of principals during reopening. The participants in this meeting are Paula, the special education director; Gem, the compliance coordinator; Alma, the programs coordinator; Aiyana, the program specialist over nonpublic schools; Rose, the program specialist over district professional development; Steven, the program specialist over high schools; and Blair and Armando, the program specialists over K-8 schools. Following the meeting, a table will be presented which will include the type of episodes, shifts in topics, the emotional aspects of the meeting, cognitive aspects pertaining to problem-solving episodes, and whether the episodes were related to the pandemic.

Episode 1. As the program specialists enter the Zoom meeting, Alma noted that the only absence from the team that day would be Sandy. Gem then started an intentional team-building activity, by passing the meeting time over to Rose, stating, "now that everybody's here, Rose, you want to welcome all?" Rose then shared her screen which displayed a PowerPoint slide that had eight boxes with each box listing a different hypothetical. The boxes were as follows (box 1) "a personal chef who cooks all your meals, but you can't choose the menu"; (box 2) "a free home, but you can never sell it or move"; (box 3) "free medical for life"; (box 4) "a free car of your choice, but you can only drive 100 miles per month"; (box 5) "A lifetime supply of books, but you can only read each one once"; (box 6) "A wardrobe filled with designer clothes, but you don't get to choose what to wear"; (box 7) "unlimited airline tickets for life"; (box 8) "free groceries for life." With the boxes displayed, Rose then said, "All right, pick two."

Aiyana quickly came off mute and said, "Oh, that's easy; three and seven." Rose laughed and nodded her head in approval. "I figured you'd go for that." Alma jumped in next, "Seven and eight. I have two teenagers!" Rose and Gem seconded this choice. Paula then said, "Mine is two and seven." Rose, in disbelief, said, "a brand-new home and you'd never sell it?" Alma followed up saying, "You're stuck there, *forever."* Armando, coming to Paula's defense, "agreed" with Paula and chose boxes two and seven. Rose then asked Steven, "what do you pick?" Steven reviewed the boxes and stated, "I like three and seven."

Episode 2 With the team-building activity now over, Paula moved the team onto the next topic of discussion where she detailed a situation that she was being constantly called about, regarding reopening procedures for schools amidst the pandemic. She started this episode by stating, "all right, let me see … I don't know since what time, but prior to 8:00 a.m., I received three principal phone calls, most of them regarding bussing [only students with special education services were bussed between their homes and schools]." She then went on, "yesterday the same thing was happening up until 7 or 8 at night." She noted that some of the phone calls came from the district superintendent and associate superintendent as principals "weren't able to reach us [the program specialists]," so they reached out to the district higher ups who then called her for answers. She then put forth her demand to the team: "I want to say today, no phone calls go unanswered. I know you all are really busy … but we have to be able to problem solve and help them [the principals] problem solve situations." Paula then paused, asking if there were "any questions" on what the program specialists were to do when it came to the principals' phone

calls. The team remained silent for about 45 seconds before Paula looked down at her phone. She then excused herself, saying, “I'll come back” before leaving the Zoom room.

Episode 3. There was another brief silence after Paula’s abrupt departure. Alma said, “I guess questions in the meantime?” Gem picked up on this, taking the opportunity to shift the team to another topic. This episode pertained to paraprofessionals [paras; staff members who aid and support students with disabilities] needing to be reassigned, based on seniority, to those schools that reopened during the pandemic as not every school resumed in-person classes. Gem began the episode by noting that “there is a lot of confusion around para[professionals]. [An HR administrator] emailed last night saying that they're working on para [paraprofessional] assignments.” Gem further detailed: “so there's a little bit of delay. I think they [the principals] got a spreadsheet to fill out …” Blair, exasperated, “This whole para situation is bonkers.” Shaking her head in agreement, Alma moved the episode forward: “Armando, just so you know, I talked to [a principal] last night and this morning, I mean through text, but she filled it out [the spreadsheet]. So, you just need to sit tight. She knows what to do.” Armando, annoyed about not understanding what “spreadsheet is” or what “principals are supposed to do with it,” put forth the following: “we're expected to support principals with minimal to no information regarding this [the spreadsheet] … I think it's ludicrous that we're supposed to say how high when we're told to jump without having a safety net underneath.” Gem commiserated, “Yes, the para situation is confusing at best and frustrating beyond measure at worst.” After this comment, there was a short pause in the conversation.

Episode 4. As the meeting atmosphere grew uncomfortable due to the silence, Blair picked up the conversation, shifting it to a discussion regarding personal protection equipment. Blair brought forth the problem that teachers of students with significant disabilities haven’t been given “gowns yet.” Blair further detailed that Aiyana told her they were placed in the “isolation tent” (where students were sent if they had a fever). However, Blair was hesitant to take them as she believed that the gowns were “for the isolation tent, not for our teachers.” Armando backed her: “we were promised those gowns, particularly [one elementary school] has a lot of kids who do a lot of drooling and spitting ...” Rose offered a suggestion. “I recommend you go and steal them from the iso [isolation] tent.” This solution was seconded by Alma who noted that Sandy used this approach with success. Gem then sanctioned the solution stating, “take what you need and then ask for forgiveness later.” With that, the team agreed that they would take gowns from the isolation tent for the special education teachers as needed.

Episode 5. Gem then took advantage of the slight lull in the conversation, shifting it to a new topic. She asked the team, “Is there anything going well? I want to hear something that’s going well.” Rose noted that Sandy “ran a really great parent meeting” regarding schools reopening and COVID procedures. Armando then gave Alma a shoutout for how well her parent meeting went. Alma noted, “I heard that all the parent meetings have gone really well.” As the team discussed the positivity surrounding the parent meetings, Paula rejoined the Zoom meeting.

Episode 6. Paula apologized for having left the meeting but quickly shifted the team to another topic where she reiterated the need for the program specialists to be “glued” to their phones. She told the program specialists that a principal called her stating, “I am calling you [Paula] because I can't reach my program specialist.” She went on to note: “I know that they're overwhelmed, and they're just sort of being exaggerative, but I want to eliminate that ability for them to say that.” She then asked if the program specialists had any questions regarding this. There was a long silence amongst the team.

Episode 7. With no questions asked, Paula moved the team to another topic. “the second thing is there's going to be a lot of requests for moving bussing around.” She then detailed how the program specialists should handle requests to change student bussing: “we can cancel bussing for today, and we can change bussing for next week, so the parents will have to bring the student” until the bussing issue is resolved. She then instructed that the program specialists will “have to support” the transportation manager. She then directed the program specialists that they will “have to do some problem-solving on your own” with the transportation department head. She paused, “any other questions right now that are coming up for you?”

Episode 8. At this point, many of the program specialists were looking away from their screens with all of them on mute. Gem, sensing the silences and the uncomfortable atmosphere in the Zoom room, asked Paula, “When there’s an issue, and we don't have the answer, and we have some missing information, I feel like sometimes I'm nervous even about reaching out to someone, and people will be upset that I'm going around something.” Paula shifted in her chair. “Like I said, we just need to be the problem solvers, and so, if there's another step that needs to be taken, we need to be the one taking that step rather than shuffling it to somebody else.” Another silence occurred for about 30 seconds. This prompted Paula to suggest that if the program specialists “needed help” from other district administrators (e.g., human resources, assistant superintendents), to “always preface anything with a principal's name and somehow that gets elevated, it [becomes] important.” The program specialists nodded their heads in understanding. Paula then asked, “Anything coming up that we all should be aware of?” No one came off mute. No questions were asked. Paula wrapped the meeting with, “Okay, guys, no need to keep you. I'm going to be tethered to my phone, so let me know what you need. All right?” The program specialists nodded their heads in agreement and then left the Zoom meeting to attend their school sites.

Table 9

Analysis of the Program Specialists Meeting Flow

Meeting Episode #	Episode Type	Topic Shift	Emotional aspects	Cognitive aspects	Pandemic related-topic
1	TB	Start meet	Positivity,	/	/
2	IR	Haphazard	Demoralized, Directed communication, Controlled task delegation	/	Yes
3	IR	Haphazard	Defensiveness, Lament, Directed communication	/	Yes

4	PS	Haphazard	Lament, Demoralized, Defensiveness, Cooperative problem solving	Specific problem named, Limited info, Clear solution, Shard understanding, Moralized, Consider the end users, No monitoring of solution	Yes
5	SC	Haphazard	Positivity, Seeing strengths	/	Yes
6	IR	Haphazard	Lack of engagement, Directed communication, Defensiveness, Demoralized	/	Yes
7	IR	Haphazard	Lack of engagement, Directed communication, Controlled task delegation, Demoralized	/	Yes
8	IR	Limited continuity	Deference to the chain of command, Demoralized, Lack of engagement, Directed communication	/	Yes

Note. TB = team building, SC = side conversations, IR = information receiving, and PS = problem-solving. The symbol "/" means that the category is not applicable to meeting episode.

Meeting Flows Analysis

Based on the established criteria for effective problem-solving: (1) participants must tackle an issue with sufficient upfront information to fully understand its nature; (2) they must collectively establish a clear understanding of the specific behavior they aim to alter; (3) they should explore the underlying causes of the issue or behavior; (4) clear decisions and actionable items should be formulated; (5) solutions or remedies should be chosen or organized in a manner that resonates with end users, encouraging their willingness to change and facilitating implementation within a reasonable timeframe; and (6) evidence must be accessible to assess the

effectiveness of the remedy, allowing for adjustments or revisions as needed (refer to the methods section). The analysis of meeting flows demonstrates that both teams' meetings attempt to address problems. However, the observed micro-cognitive and emotional communication and emotional processing inadequately align with these problem-solving goals. Meetings often exhibit only a superficial engagement with the issues, lacking the depth necessary for a thorough understanding and resolution. Emotional responses, such as demoralization and defensiveness, dominate, overshadowing constructive dialogue and hampering the development of clear and actionable solutions. This disconnect indicates a significant gap between the cognitive processes required for effective problem-solving and the emotional dynamics present within the team meetings.

Furthermore, the hierarchical structure within these teams significantly impacts micro-level communication. The program specialist team, designed to act as a bridge between top-level management and classroom realities, finds itself marginalized in the problem-solving process. This marginalization translates into feeble problem-solving efforts at the crucial classroom level. Meanwhile, the top-level team, particularly the director, is predominantly engaged in episodic problem-solving, lacking both depth and continuity. Predetermined solutions, often formulated without a comprehensive understanding of the underlying problems, result in a cycle of ineffective decision-making and emotional exhaustion among team members. The top-down approach, characterized by directives primarily issued by the director without adequate deliberation, fosters a passive reception among the program specialists, stifling their active engagement and collaborative problem-solving. This passive dynamic is particularly problematic, given their direct contact with teachers, and could significantly influence classroom outcomes. Their detachment from the decision-making process leads to weaker problem-solving outcomes for the department, as evidenced by their torn response between silence and solidarity with the top-level directives.

The problem-solving dynamics of the director and coordinators underscore some challenges. Despite dedicating approximately half of their time to problem-solving, their approach is marked by episodic, top-down decision-making with limited room for collective deliberation, even within their own team. This results in frequent shifts in focus and solutions lacking in depth, compounded by decision-making processes that fail to consider end user needs adequately. Consequently, the emotional aftermath for team members is overwhelmingly negative, characterized by feelings of exhaustion, demoralization, and lamentation.

In light of the myriad challenges confronting the teams, the overwhelming nature of existing problems becomes evident. They grapple with numerous issues, from fundamental procedural gaps to systemic inefficiencies, which obscure the path to clear prioritization. The sheer volume of concerns complicates the identification and resolution of critical problems, contributing to a pervasive sense of overload and dysfunction. Amidst this chaotic backdrop, the marginalization of the pandemic from central discussions raises significant questions. Why is this global crisis, which exacerbates existing issues and introduces new complexities, not receiving the attention it demands? This oversight can be attributed to the preexisting disarray within routine organizational operations. Faced with a critical juncture, the teams had two viable options: either temporarily set aside these longstanding administrative issues to focus on the immediate, pressing challenges presented by the pandemic, particularly those affecting basic service provision, or continue to adhere to their established concerns, thereby neglecting the urgent needs prompted by the pandemic. The choice to cling to familiar problems, effectively sidelining the pandemic, underscores a reluctance to confront and adapt to the unprecedented

circumstances, revealing a profound disconnect between the teams' operational focus and the emergent realities imposed by the global health crisis. This approach not only highlights the entrenched resistance to change but also illuminates the dire need for a shift in priorities to address the pressing demands of the moment effectively.

The Change Projects

Gaining a deeper understanding of how the special education context affects the teams and their members and analyzing how the team allocates its time, coupled with a detailed look at their typical interactions during regular team meetings, provides insight into how the team orientates itself and navigates problems—namely the change projects. Based on the interview data and meeting observations, the culture within the teams is distinctly influenced by their activities, interactions, and the special education context. The coordinators and director form a notably cohesive unit, characterized by trust and smooth collaboration among its members. This contrasts with the dynamics observed within the program specialists team. A significant portion of their time is devoted to receiving information, engaging in side conversations, and participating in team-building exercises. While these activities were crucial for establishing rapport and understanding new initiatives, they inadvertently reduced the time available for focused problem-solving. This is particularly evident with the program specialists team, where the emphasis on team-building and information-receiving sessions, coupled with frequent side conversations, dominated their time.

The special education context influenced the problems they prioritized and how they tackled them. Namely, the interview data revealed that the teams grappled with the challenge of balancing compliance with pedagogy, particularly navigating the tensions between regulatory requirements and the educational needs of students with disabilities. This was compounded by systemic issues of siloization, which hindered synergy between special and general education, and was exacerbated by political dynamics and bureaucratic hurdles that limited effective decision-making and collaborative efforts. Workload overwhelm, a critical teacher shortage, and the unprecedented demands of the pandemic further influenced the teams' prioritization of problems and, subsequently, how they problem solved them.

These insights revealed the impact of the special education context and team culture on their ability to engage in deeper problem-solving tasks. The program specialists, constrained by limited time for thoughtful deliberation and operating within a rigid hierarchical structure, faced amplified challenges in effective problem-solving. With this revealed, in this final section, I delve into a comprehensive exploration of the intricate problem-solving processes undertaken by the special education administration teams within ABC School District. These narratives focused on two core teams: the director and coordinators team, and the program specialists team. Each faced unique challenges in their journey to address and manage crisis and adversity, particularly during the unprecedented times of the pandemic. The centerpiece of this study is the "change projects," which are not fleeting efforts but extended episodes of problem-solving, spanning numerous meetings and discussions.

The Passport Change Project

Passport Change Project Introduction

The passport project began with the issue of transitioning special education students from middle to high school. Transition planning emphasizes the need for a coordinated, individualized approach to address students' unique needs and goals throughout their educational journey. The transitions between school levels (e.g., elementary to middle school) are generally regarded as

minor transitions, whereas transitions from high school to postsecondary life is a major transition for students which begins at age 14 and has formal, legalized procedures.

The passport change project shows the team struggling with how to address the issue of poor transition planning. The passport change project demonstrates the team's ambitious aim to improve student transitions with limited time for thorough exploration. Rushing to implement the passport solution, they focused on bureaucratic procedures rather than practical teaching needs, leading to teacher resistance. Due to the team's weak political influence in the district, the project became voluntary, and likely unimplemented, perpetuating ongoing frustrations with current transition planning. This change project spanned six meetings between December and February: three director and coordinators meetings, two program specialists meetings, and one litigious IEP cases meeting, which I did not attend due to the sensitive nature of these meetings. The actors in this project are Paula, the special education director; Gem, the compliance coordinator; Alma, the program coordinator; Sandy, the program specialist over preschools; Corrine, the researcher; and Blair and Armando, both program specialists over K-8 schools.

Director/Coordinator Meeting 12/9/2020

The topic of transition arises after Gem departs for a contentious IEP meeting, leaving Paula and Alma to carry on the meeting without set agenda items.

Paula: What else?

Alma: Nothing.

Paula: There's a couple of things I wanted to talk to you about. One is … and this seems to be a good point to talk about transition … I don't think that our eighth graders, and I know our ninth graders at 16, are not getting the big T transition plans that they should be getting. They're not really well thought out with adult goals … so, in January, we need to do a massive training of teachers on how to write those plans.

Alma confirms that a "big T transition" training is scheduled in the next month. Paula then moved them onto a new topic regarding articulation meetings.

Paula: Okay, there's other transitions I was going to talk to you about, the articulation meetings. I think the basic idea of them was good, and then over the years it just got to be less and less useful. But that idea seems to still hold … the teacher and the receiving school meet and have a conversation about each of the students.

Corrine: And what is the expectation of these meetings?

Alma: The idea is for the receiving case manager [teacher] in like elementary to middle to talk about the student's needs. And they talk about things not only academically, but what social support system do they [the transitioning students] need or the quirky things they do. Things that sometimes are not in the IEP, too.

Paula: I realize that I hadn't been on the same page because … I always thought the articulation meeting was for the middle school to convey, 'this kid is receiving pullout RSP [a resource classroom] at this level. That equates to a basic level class, and we would program them into that [class].'

Alma: What we saw the year before was too … it became just a social meeting, and they just chatted about their own personal lives.

Paula: Right … I wanted to transition over to SPED [special education] solutions, and we are on that …

The discussion concludes similarly to this exchange with various aspects of the transition topic being brought up, and with each participant holding a distinct perspective on the issue.

Director/Coordinator Meeting 12/16/2020

The meeting begins with the team setting the agenda for the program specialists meeting.

Paula: Let's talk about what should be on the program specialist agenda.

Alma: Transition.

Gem: Yeah, it's time because we're going to need to figure out how we're supporting resource specialists in understanding programs that they're sending students to …

Paula: I think we have some cleaning up to do in our department because I'm not sure we have a consensus about how articulation should look, and we've got new staff … now would be the time to say this is how we're doing articulations, and this is how we want them to look.

Gem: Last year, it's pretty clear that the teacher [articulation] meetings didn't happen. So I think we should plan [them] and it should be facilitated by the program specialists.

Paula: To be frank, I'm hesitant, unless somebody can give me a really good reason why we need them. I know that there are some teachers who appreciated them, and maybe there was some good information that went back and forth, but I'm trying to figure out a different way.

Gem: They [teachers] might have enjoyed them, but what was the value added? And my guess is it's a lot of what could be communicated through some other mechanism … In previous districts, I've had what they called a passport, and it was a document that the teacher would fill out with some of that kind of, very personal, [information] … It was not just the IEP at a Glance. I think it was really welcomed by the case managers who received the students because it did give a little personal flavor … so, rather than paying teachers their half day to do that [articulation meetings], have them write passports that are thoughtful.

Paula: I'm going to say for Friday's [program specialist] meeting, we're going to talk about no articulation meetings as they worked in the past, but they're [program specialists] going to be collecting data on each of the students transitioning, and we can give them the passport to collect that data. Gem, if you can get your hands on one …

The team concludes the meeting with the passport document set as the solution to the transition and articulation issues.

Director/Coordinator Meeting 1/27/2021

The meeting starts with a discussion of the silences among the program specialists when Paula attends. Alma notes they're more open when one-on-one and highlights a significant feedback shift on the passport document from group to individual settings. Paula questions if her presence or the meeting's approach causes the specialists' hesitancy to discuss.

Gem: I think it's a little bit of all of it. The formality and structure of the way program specialist meetings have been operating I think contributes to that; like I'm here to get information. I do think your presence impacts people's willingness to take the risks … I think you're the big boss, right? I think people want to have the right answer, or they have a little bit of guard on in terms of being willing to throw an idea out that might not be well thought out.

Paula: I don't see it that way. We are problem-solving … but I certainly don't need to take four hours of people's day only to have you guys turn around and have to have another meeting with them to get the real information out…

Ultimately, Gem and Alma agree that Paula will not attend the following program specialists meeting to promote discussion regarding the passport change project.

Program Specialists Meeting 2/5/2021

The program specialists meeting commences with the team reviewing the passport document. The team enters into a debate regarding the information presented in the passport document, paperwork overload, and teacher IEP responsibilities.

Alma: All right, let's go.

Armando: Alma, I talked to you about the passport and how some of the [teacher] feedback that I got was that it's too long. This information is on the IEP at a Glance. “I [teachers] don't want to do three pages.”

Armando shares a one-page version of the passport he developed, emphasizing areas such as instructional strategies, student behavior, and mainstreaming opportunities. He drew inspiration from a similar format used in his former district which valued a teacher comments section. In contrast, Alma pushes the inclusion of IEP data in the passport as it is crucial due to a backlog of outstanding IEPs. Blair reiterates that the teachers’ perceive the passport as redundant.

Blair: I can just hear teachers saying all this stuff is in the IEP … some teachers have eight kids that are moving, and it's like, “you want me [the teacher] to go through every IEP to write down what they [receiving teachers] can look up?”

Alma: I do agree, if I was a teacher, I would have the same complaint … but you know, we used to have the articulation meetings, right? We don't have those anymore. And even when we did, not everybody showed up … I feel like it should be a one-page thing, but at the same time, I feel like all this [IEP] information is needed. So, that's kind of why I'm stuck … I guess. If there's anything that we can get rid of, then let's just get rid of it. But we have to make sure that the teachers are *looking* [emphasis added] at the IEPs when they come back in the fall.

Gem recommends adding a section on the student's distance learning performance or missed services due to the pandemic, but Blair worries it might make the document longer than a page. The team then shelves the passport document for the remainder of the meeting, knowing they have an additional week to refine it. At this point, the passport showcases key IEP elements, offers a section for teacher comments on the pandemic and personal student details with the “IEP at a Glance” attached, making the document nearly four pages.

Program Specialists Meeting 2/26/2021

Alma starts the meeting by outlining the agenda, but Sandy points out the omission of the passport change project. Alma then addresses the high teacher resistance to the document.

Alma: I know your teams don't like it. I think I will just have to kind of make a decision … We're getting a lot of pushback from the teachers, saying that it's the same information [in] the IEP at a Glance. That they don't see the benefit of the passport.

Sandy: So, could we make it voluntary, then? At least some of them may do it.

Paula: I don't think it's something I want to push. If they don't view this as a solution, then I don't know that we want to force it.

With the passport document becoming voluntary at this point, it is not addressed or mentioned again during the remainder of the school year.

Passport Change Project Analysis

After 30 minutes of discussion, Paula, Gem, and Alma have proposed an ambitious goal of improving student transition plans and meetings with the passport serving as a means of improvement, though they recognize that the passport solution may not fully address all the underlying issues. Several reasons may explain why the passport change project couldn't fully address the transition issues, such as the lack of resources to implement such a solution (e.g., time, trainings), district teachers' consistent non-compliance with mandatory paperwork, feelings

of overwhelm due to the ongoing pandemic crisis, and their belief that an overly bureaucratic approach didn't genuinely benefit students' well-being and learning. However, the manner in which the team addressed the transition issues and its subsequent solution might also be noteworthy. The issue originated somewhat spontaneously from Paula's sentiment, and given her role as director, her position added urgency to the transition and subsequent articulation meetings issues. After Paula raised the transition issue, detailing her frustration with the current course of transition planning and meetings, Alma and Gem intuitively pursued it. However, while the perspectives of the director and coordinator team seemed to diverge, with each having a unique understanding of the core transition issues, a solution was swiftly identified from a previous successful implementation of a passport document in a different district context.

Yet, shortly after introducing the passport as an addition to the transition monitoring system, implementation hurdles arose. Instead of exploring how the passport could enhance existing practices, it was adjusted to address anticipated reluctance from teachers by omitting repetitive IEP details. But, when Alma insisted on the instructional significance and moral desirability of including the IEP information in the passport, urging teachers to review it, the size of the passport grew once more. This overly bureaucratic approach, emphasizing legal compliance and procedural correctness in the passport document, points to the tension of desirability and realistic implementation of the passport document. While these efforts were aimed at improving student support, they risked becoming overly procedural and possibly detached from the actual pedagogical needs and realities of the teachers and students involved. A potential solution to this tension might have been for the program specialists to show teachers the tangible benefits the passport tool could offer to students' learning, especially during the COVID crisis; however, the team satisfies itself with a nebulous plan for its implementation. This might be attributed to the swift adoption of the passport solution that had been previously used, and presumably, with success. Consequently, challenges in implementation emerged as a significant concern. When Paula perceived micropolitical difficulties due to significant teacher resistance to, and criticism of, the passport document, she decided to abandon the chosen solution, and in fact, any potential solution. Despite efforts to innovate and improve processes, the eventual decision to make the passport document voluntary, and the lack of follow-up, suggested a reluctance or inability to push through significant changes, thereby perpetuating the status quo of poor transition plans.

The Visibility Change Project

Visibility Change Project Introduction

The visibility change project started with high-level district administrators questioning program specialists' work and visibility. In this change project, we see that the program specialists' siloization from other district-level administrators, particularly those in general education, diminishes their political standing and makes them more susceptible to criticism from these administrators who may not fully grasp the nature of the specialists' work. Consequently, Paula, Alma, Gem, and the program specialists were compelled to increase the visibility of their work, leading to surface-level discussions about the problem and the subsequent solution of restructuring their roles. However, this potential restructuring for enhanced visibility encounters a disconnect with available resources, such as time and training for the program specialists. The proposed changes face resistance from the program specialists, who questioned the benefits to their work and the schools they support. Due to this resistance and a lack of adequate exploration of how restructuring could positively impact both the program specialists and the district, the visibility change project was eventually put on hold. This project covered four meetings between

February and June: three director and coordinators meetings and one program specialists meeting. The actors in this project are Paula, the special education director; Gem, the compliance coordinator; Alma, the program coordinator; Corrine, the researcher; and Blair and Armando, both program specialists over K-8 schools.

Director/Coordinators Meeting 2/10/2021

From the onset of the meeting, Paula brings up a concerning conversation she had with Ming, the associate superintendent of student and family services.

> *Paula*: I was in my one-on-one meeting with Ming, and she keeps pointing out that our program specialists, although we have a ton on our plate. There's no initiative. I don't disagree with her … and what's happening too is Daphne [the assistant superintendent] is saying stuff like "what do the program specialists do?"
>
> *Alma*: We spend most of our time putting out fires … **Is there something missing between the comma after specialists and although? Pointing out that the PSs don't seem busy, do enough? It reads a bit oddly as is**

Paula then shares that upon joining the district, she observed a history of chaos and unstructured decision-making. As a response, she took strong measures to streamline processes, including dismissing several employees who didn't adhere to her plans. This firm approach was necessary for setting a direction for the department, but she reflects that this could impact some of the program specialists who were present for this upheaval. After establishing a disciplined framework and providing training, Paula believes the right team is in place, with a focus now on collaborative decision-making and undertaking "projects."

> *Paula:* I think we need to come up with a project or come up with three or four initiatives that we need to make some changes on. Then next year that will be a project that they work on for the year. It's something they're interested in. But it also has to be a need …

The meeting progresses to the next agenda item while the matter of program specialists initiative taking remains broadly defined, with the idea of projects as a possible solution.

Director/Coordinators Meeting 4/28/21

From the onset of the meeting, Paula brings up a concerning conversation she had with Daphne regarding how other district administrators view the work of the program specialists.

> *Paula*: Daphne said program specialists are really gonna have to step up. I said, 'I need you to tell me more about that because from my perspective … there's no time in their schedules that they're not with school sites doing some task.' She's like, 'just visibility, they need to be more visible.' I need to take that as meaningful feedback … how can we coach our staff to have that visibility?
>
> *Gem*: I find it hard to think of how to provide feedback to our program specialists from that topic because I don't understand the visibility piece … I just don't know what visibility looks like from Daphne's point of view. If there are specific things that we are not visible in that we need to be visible in from Daphne's or other's perspective, let's fix that. We'll become visible.

Paula expresses that the pandemic has obscured the program specialists' work. Alma loops this back to the conversation on visibility.

> *Alma*: That's the whole visibility thing. Because something that does worry me is … when we were in person, you [the program specialists] would go to the school. So even if the admins [the principals] weren't attending site [special education department meetings] check-ins, they would see them on campus. But now, the majority of them [principals] don't attend those check-ins. If it's coming from the sites, I feel like it's because they're not showing up.

Paula: There's some degree where you don't have to come to all of them but then don't complain that we're not visible. Okay, let's think through that. We can start working by making sure that our staff are visible, to rethink their work and make them more visible.

The visibility concern, largely rooted in ambiguous comments from top administrators, gains prominence when Paula brings it to the fore over these past two meetings. Despite Paula, Alma, and Gem not fully agreeing with the scope or urgency of the issue, they remain receptive to addressing it. The idea of re-envisioning the roles of program specialists emerges as a potential strategy to enhance their visibility.

Program Specialists Meeting 5/28/2021

The meeting begins with Gem detailing the many absences from the group that day, including Alma, Sandy, Aiyana, Steven, and Rose. Paula then moves the team onto the topic of restructuring the program specialists' work to become more "visible."

Paula: I would love to have you guys think [about] the way we have it [your work] currently structured. Is it the structure that will serve our population, our students, our parents and us going forward? Or is there a redesign, a rework of how we're structured internally? I really want you guys to think through it, too, and come be partners with us in how that might look.

Gem: Paula, can you elaborate a little bit? From what I've heard, administrators don't see us as visible. That visibility question is in play … so in thinking about structural changes or different ways of operating, what are some questions that come to your mind when you're thinking about ideas for that? Kind of give us some prompts …

Paula: The reason I didn't want to give the prompts, but I will, is that I didn't want it to stagnate you in your thinking. I wanted you to be able to think completely openly.

Rather than providing prompts, Paula outlines the history of the program specialists' work structure and proposes using a high school feeder pattern for restructuring while emphasizing the meeting's brainstorming nature. Gem then suggests restructuring to increase their "visibility."

Gem: Look at your work patterns to see where we might more efficaciously use your time in a way that's really … visible. I don't think we're invisible, but I want to make sure we're very *present* going forward.

Paula: Yes, it's about visibility, but it's also what works for us too. I want us to think it through. Well, how do you make it less [work] if you don't change the roles and responsibilities of everyone? We can't drop anything that we're doing. I would like for you guys to continue to meet and actually produce a document that has brainstorming ideas … on how the department can restructure. Something that shows what you guys are working on. I'm gonna leave because I want you guys to have those frank discussions without me.

Paula exits for another meeting. Gem, surprised by the restructuring topic, says that she appreciates the program specialists' efforts and mentions that she, Alma, and Paula have considered reorganization "to be more involved" in the district's operation. Gem departs, leaving Armando, Blair, and Corrine to continue brainstorming, with Corrine documenting the restructuring changes proposed. As the conversation begins, Blair notes feelings of overwhelm when it comes to any impending changes that a restructuring of her work may entail.

Blair: [next to] the program specialist structure possibilities, can you put Blair does not like change. Please leave her stuff alone. It gives me anxiety. I don't want to change … We can't keep changing to meet the needs of everybody, like on the outside [other nonspecial education administrators], because it changes so much.

In an effort to produce a document to present to Paula, Armando and Blair discuss several different feeder patterns, landing on a high school feeder pattern, as a way to restructure their work. The team shifts from discussing restructuring to instruction.

Director/Coordinators Meeting 6/9/2021

Paula begins the meeting by referencing the program specialists restructuring document, created by Armando and Blair and wants to continue the discussion. The team reviews the suggested high school feeder pattern with Alma raising concerns that such a structure would place several program specialists at one school, possibly causing confusion for teachers and principals. Despite reservations, the team leans towards this approach.

Alma: I think that if we are going to change things, we should change them by the high school feeders. I can't see any other way to proactively make a change.

Paula: I don't need to have change for change's sake. I just need to make a change if we feel like it would actually support sites and the program better.

Gem believes that a broader K-12 perspective would enhance program support and promote the visibility of the program specialists' work. The team discusses how such an approach could foster better coordination and align everyone's thinking regarding program development. However, this would demand program specialists take on more of a leadership role. The team notes that this could increase resistance pushback among the program specialists.

Alma: Just be ready for pushback … especially from Blair

Paula: I know there's frustration … they [program specialists] feel like every year they have to justify their jobs. But at the same time, there's frustration on ed [educational] services [other upper-level district administrators] part. Because they don't know what we do, and they don't see the value in what we do. How do you justify the value of what you do when people don't see it? So, how do we become more visible? I'm not saying that we don't have value and that anybody's lacking in their work or that they're not working hard. But we have to …

The conversation ends abruptly when Gem receives an urgent phone call. Paula notes that "time was up anyways," and that the team will come back to this discussion later. However, as the school year nears its end, the visibility change project is not revisited.

The Visibility Change Project Analysis

The "visibility" of the program specialists' work emerged not from their actual performance but rather from vague grievances by top-level, nonspecial education administrators, placing visibility as an urgent concern for Paula. The lack of visibility is a result of the special education administrators being siloed from the other district-level administrators. As such, the other district administrators were unaware of the program specialists' roles and responsibilities, as these administrators are often excluded from district-level team meetings and decision-making. This suggests a vulnerability of the team to criticism from higher-level district administrators, as the group's contributions and effectiveness are not fully recognized or valued. This perception places them in a weaker political position in the district, having to constantly justify their roles and work. Despite recognizing the full commitment of program specialists, Paula, Gem, and Alma embarked on addressing the visibility issue. However, it appeared that the team had an amorphous understanding of the problem, its depth, and implications.

Amid this uncertainty, the focus wavered between enhancing visibility and streamlining their work for greater efficiency. While factors like remote work during the district-wide COVID shutdown and minimal interactions with top-level administrators, such as Daphne and Ming,

might have influenced the perceived "invisibility" of the program specialists, these elements were not directly tackled when addressing the cause's issue.

In the quest for solutions, Paula pinpointed two potential strategies: introducing specific projects and restructuring. The projects plan, however, was shelved for the academic year due to the pressing concerns of the district-wide reopening plans during the pandemic. In contrast, restructuring was given consideration with Blair and Armando being tasked by Paula to explore its potential, all while juggling their existing roles. Given the broad directive to develop a work pattern that would enhance their visibility, the team struggled to grasp the core of the visibility problem and how to effectively address it. In the end, the team's proposed structure echoed Paula's concept of a high school feeder pattern to restructure their work.

This ongoing visibility issue accentuated the tension between the perceived worth and the actual contributions of program specialists. Blair, in particular, felt a heightened sense of overwhelm and instability, perceiving that her work was continually shifting based on the whims of nonspecial education administrators such as Daphne and Ming. As such, Blair swiftly pushed back against the idea of restructuring. Such resistance may have been avoided, if Blair and Armando had a clearer understanding of the visibility issue and if the task focused on ways to amplify the visibility of the program specialists' existing work. Additionally, the focus on restructuring and enhancing visibility, underscored by a lack of detailed discussion on the potential impact on teaching and learning, suggests that the emphasis was more on bureaucratic and administrative aspects rather than on assessing how restructuring might enhance the program specialists' work and benefit schools.

As Paula, Gem, and Alma reviewed the restructuring document, there emerged a consensus favoring the high school feeder pattern as the best restructuring method to increase program specialist visibility. This change would necessitate program specialists to assume a more pronounced leadership role to bolster coordination and alignment across programs and schools. Yet, the proposed changes posed structural challenges (e.g., more than one program specialist assigned to a school) and demanded greater work, suggesting a gap between the ambitious goals of increasing visibility and restructuring and the practical means to achieve them. Faced with anticipated resistance and the complexities of implementing such a restructuring, Paula ultimately abandoned this approach to increase program specialist visibility. Yet, confronting such resistance might have been possible by reviewing and adjusting the program specialists' duties, thereby accommodating the expanded leadership roles. With no definitive solution, expected resistance from the program specialists, implementation complexities, and the school year ending, the restructuring idea faded away. This left the coordinator and director team much in the same position as at the beginning of the change project: how do they make the work of the program specialists visible and valued?

Goalbook Change Project

Goalbook Change Project Introduction

The Goalbook change project initially focused on securing curriculum for Extended School Year (ESY), which refers to supplementary educational services offered to students with disabilities beyond the standard school year to prevent regression in academic skills and knowledge. Goalbook is a software platform where teachers can access prewritten, standard-based goals and learning activities designed for students across grade levels and various disability diagnoses and support needs (e.g., students with mild to significant disabilities).

In the Goalbook change project, the team expressed frustration with a multitude of problems that appear to plague the district on which they can seemingly make little change. As

such, the team centered on the Goalbook solution. Many problems were generated around the solution with scant attention paid between the identified problem and the focal solution. With the solution set, the team hopes for teacher implementation and improvement in pedagogical and IEP issues (goal development). However, short conversations that keep on-the-surface issues and the legalistic and bureaucratic bent of the Goalbook software combined with team's perceived conflicts with the union, the Goalbook change project had limited uptake. This change project spanned seven meetings between January and May: two director and coordinators meetings and five program specialists meetings. The actors in this project are Paula, the special education director; Gem, the compliance coordinator; Alma, the program coordinator; Rose, the program specialist over professional development; and Blair and Armando, both program specialists over K-8 schools.

Director/Coordinators Meeting 1/27/2021

The team is preparing for ESY, when Gem brings up a concern regarding instruction.

> *Gem:* One thing that I think is missing often is we have the kids identified [for ESY], but what are the teachers doing with the kids? Is there something we can provide … some sort of packaged curriculum … I don't know if money associated with COVID could be used to purchase some curricular materials that could support teachers who seem kind of vague on what they should be doing with kids.
>
> *Alma:* I just think Unique [a learning system]. It gave me enough work for the whole time.
>
> *Paula:* If Goalbook can be something that we can get, it technically is not a curriculum, but it does say here's a goal, here's how you bring down that goal, and here's some activities to do [for] that goal. So, while it's not a curriculum, and ESY in particular is supposed to be goal-focused, not just this general 'let's teach you how to read kind of thing.'

The discussion ends with Alma laughing lightly while Gem remains quiet, after which Alma guides the team to the next agenda item. Given Paula's authoritative position and her efforts to secure the Goalbook software for the district, Gem and Alma refrain from suggesting alternative solutions to the ESY curriculum issue.

Program Specialists Meeting 2/12/2021

During COVID, ABC school district had major concerns related to overdue individualized education plans (IEPs). *Overdue IEPs* refer to when a student's IEP has not been reviewed, updated, or rewritten by its annual due date as per federal law. Gem begins this meeting by raising a concern she saw during a district-wide audit of IEPs, noting that around 30 percent of the district's overdue IEPs could be eliminated if teachers met the seven-day timeline for affirming and attesting IEPs. Paula expands Gem's point by advocating for her plan to introduce Goalbook as a means to support teachers with their IEP tasks.

> *Paula:* Goalbook is another thing that I want to be able to roll out soon to say this is another way we're gonna support IEPs. Because Gem just said you have to write the goals and you have to write the IEP, and Goalbook has some great goals … so, we've got to get folks set up. It's been a year-long, two-year-long process, three-year-long … I don't know how long we've been trying to get Goalbook.

The conversation ends with no input or discussion regarding Goalbook or the overdue IEPs issue as the team quickly moves onto other topics. The team's brief discussion seems to be part of a broader pattern where the team talks in snippets, skimming the surface of topics and issues, which ultimately limits conversations. Given the director's authority and the apparent finality of her decision to adopt Goalbook, the team refrains from voicing objections or suggestions—leading to a tacit acceptance of the Goalbook solution. In essence, this meeting

represents the final occasion that the team will discuss Goalbook in relation to its capacity to address a specific and related issue.

Program Specialists Meeting 2/26/2021

With the Goalbook software selected as a solution and purchased by the special education department, Paula directs Rose and Alma to set up Goalbook training sessions for interested teachers. As such, this meeting begins with Alma and Rose providing an update informing the group that mid-March was selected as a possible time frame for the first Goalbook teacher training. Rose notes that she and Alma are currently working on garnering teacher interest. Given the district's fraught history with the union, Paula intuitively feels that the union will create obstacles when it comes to choosing teachers for the few available spots in the upcoming Goalbook training. Already feeling constrained by the union regarding teacher recruitment for Goalbook, Paula believes that acquiring additional Goalbook licenses is a possible strategy to circumvent the union as each purchased license provides access to trainings.

> *Paula:* We started some negotiations with [the union] ... there was a lot of 'how are you gonna pick [teachers for the training],' and how I was having to negotiate with [the union] on that. But to avoid that and because we have extra COVID money, I'm like let's just see how many people we get. If we get more than 50, I'll go buy more because we have COVID money. In the past, I couldn't go buy any more. So, I'd rather do it that way than try to negotiate through how we're choosing and which people we're choosing.

The team transitions to discussing goal formulation, focusing on the role the program specialists have in this process. Gem and Alma pose that the program specialists should do more when it comes to goal development, particularly for contentious IEPs—those IEPs with significant disagreements or disputes among the IEP team members about the development, revision, or implementation of the IEP which can result in litigation.

> *Alma:* All right, contentious IEPs. So, Gem wanted to talk to you guys about the role of the admin at those meetings and prior to the meetings. So, what support could be provided. I'll start with prior to the meeting. You should be reading the IEPs and the goals, especially prior to the meeting, providing the support, providing goals. Making sure that goals have clear baselines, and the goal is clear itself. I know those goals have like five or six different things in one goal, so just breaking them down to make sure that they are measurable and that the short-term objectives are clear, and the baselines are clear. They're not some random statement.
>
> *Gem:* I know. Sometimes it's difficult. But that's really your role; to help move us along and not get stuck. Moving along in what the goals are for the IEP.

After this brief admonition by Gem and Alma, the conversation ended without any input from the program specialists regarding the reasons behind poor IEP goal development and how the program specialists could better support this work. Rather, the responsibility for interpreting and addressing the goal development and contentious IEP issues is left to program specialists to handle on their own.

Program Specialists Meeting 3/5/2021

The meeting begins with Alma giving an update on the Goalbook initiative. She notes that she and Rose developed a survey designed to secure teacher commitment for using Goalbook, and only those teachers who completed the survey will be granted access to the Goalbook software and trainings. As of this meeting, 17 out of approximately 90 teachers completed the survey, prompting Alma to encourage the program specialists to promote Goalbook to the teachers.

Alma: If you guys can bring it up and really, really sell it during your weekly check-ins, it would be great. I mean it is a great tool. It's really comprehensive. If you guys could tell a few things about it [to teachers], so they can participate in the PD [professional development]. It is required. So, there has to be a real commitment from them.

Alma then shifts the conversation to preparing for a school board meeting regarding reopening schools during the COVID pandemic.

Program Specialists Meeting 4/21/2021

Prior to the start of this meeting, two Goalbook trainings took place with the first one held on 3/18/2021 and the second one on 4/15/2021 with approximately 17 teachers in attendance as per the commitment survey; no exact numbers were discussed during meetings that I attended. The first training was hosted by Alma and Rose, and the second training was hosted by Alma and Armando. Alma starts the meeting by sharing her perspective on the Goalbook trainings.

Alma: I think it went well. I couldn't remember how the first one had gone, even though I remember the information. But I thought it was a big group, but it seems like everybody that went to the first one went to this one as well.

Paula: Did they [teachers] seem to have any questions based on having been using it?

Armando: There were some positive reviews, but I didn't see too many questions in the chat.

With the trainings completed, the team is seemingly satisfied with the trainings outcomes, evidenced by teacher attendance and positive reviews. The team's satisfaction with the Goalbook training leads to a brief discussion, as the prevailing positive sentiment suggests there are no outstanding issues or queries that require attention. As such, the conversation regarding the Goalbook training ends with Paula requesting assistance locating the agenda.

Director/Coordinators Meeting 5/12/2021

The meeting begins with the team detailing what needs to be discussed. Paula brings up report cards which swiftly transitions to the topic of goal carryover, which refers to teachers retaining goals from last year's IEP to the new IEP without adjustment made given the student's development or new skill level. Goalbook is promptly thought of as a possible solution for this problem as the software provides teachers a goal bank from which they can choose new goals.

Paula: Progress reports are obviously always important, but right now, they need to be meaningful because that is what it's gonna be utilized to determine learning recovery. So, we need to articulate that they need to be data based. I hear things about how great Susan [a district teacher] is … how she is a beacon of light, but I was in an IEP [with her], and there was carryover of goals. That implies they [students] didn't meet the goal, and there's no discussion about why they didn't meet the goal. That is frightening … I don't know if Susan nor anybody really understands the connection between IEP goal and services and present levels. It's just like whatever we feel like doing, we can do.

Gem and Alma share similar experiences, expressing that teachers they worked with in the past also carried over goals with little to no adjustments made, and the program specialists assigned to those cases did not notice this issue either.

Paula: They [teachers and program specialists] don't even know they're doing something wrong … I think [the union] has helped them [teachers] to not even care ... I think that they do not believe that paperwork is their responsibility because there's no evaluation on that.

Alma: Since we cannot check goals, I am sure it is happening elsewhere; it's rampant.

Paula: It's rampant, and maybe Goalbook could help, but let's talk about this in the program specialist meeting. Goals are being carried over at an alarming rate, and let's see how we can

solicit a discussion about it rather than I just tell them. Can you do it when I'm not there? Is that the best way? They [program specialists] don't want to talk when I'm there …

The team does not present Paula with suggestions on how to promote conversation amongst the program specialists, effectively ending the conversation and resulting in her attending the program specialists meeting to discuss the issue of goal carryover.

Program Specialists Meeting 5/14/2021

Two days later, the conversation from the director and coordinators meeting carries over to the program specialists meeting. Alma and Gem begin the meeting by addressing the issue of goal carryover and insufficient baseline data, after which Paula. poses a question to the team.

Paula: How connected are the teachers, do you feel, to the instructional strategies and the goals? What are you guys seeing, and what do you think they believe is the connection?

Armando: I think we're [meaning special ed] sort of stuck in the technicalities of the paperwork; that connections between goals and instruction is often not made. We, as an administrative team, could do better supporting our staff and making those two things meet.

Rose: I agree. I think those two things are completely separate. I think you start from what the goals are and that drives your lesson plan, instruction. I think Goalbook is definitely going to help because that's the way Goalbook is set up. It's done for you, basically.

Paula: Yes, when you're in special ed, the connection is the IEP. The connection to the instruction should be about the gap between where they [students] are and where they need to be. How do you make even the good teachers make that connection and value that? How do we get to the point to realize the IEP is a commitment that we need to be making to the students? Gotta think through that, and I do hope that Goalbook will help.

Armando then highlights the ongoing issue of "vague goals" and the lack of data when identifying "learning gaps." Paula positions Goalbook as a possible solution to these issues.

Paula: Goalbook will do that. Goalbook will help you do that. So, start thinking through how do we bring this to them [teachers] because there is that gap.

Armando: I think Goalbook is good at providing those short-term objectives as well. I think those would be valuable for teachers. It will tell the teacher if you make this the annual goal, then by the first trimester your students will be here. So, that's a good measure to use.

Blair: My meetings with my departments aren't very consistent right now. I don't want to mention the goals yet. I feel like I need to make sure I'm meeting with everyone for that.

Alma: We have four weeks left of school. I think the goals should be our focus next year.

Following this comment, the team wraps up their discussion on Goalbook, goal development, and instruction. As such, the Goalbook change project isn't addressed again for the remainder of the school year.

Goalbook Change Project Analysis

This Goalbook change project unfolded over the course of two hours with several issues coming to the fore: ESY curriculum, goal development and carryover, IEP tasks, progress reports, aligning instruction with goals, and pinpointing student learning gaps. These issues were introduced by different team members—particularly Gem, Paula, and Armando. However, certain issues, such as goal carryover and aligning IEP goals and instruction, were given more emphasis since Paula highlighted them. Considering the range of issues addressed in the Goalbook change project, team members held diverse views on these concerns and their effects on the education of students with disabilities and, as such, various team members brought forth new dimensions of an issue for discussion.

Though there were diverse understandings of the above issues, the team recognized the severity of such pervasive issues, particularly when it comes to the connection between IEP goal development and instruction. From this perspective and for several reasons, the Goalbook initiative became a solution that could fit a myriad of problems. Goalbook, championed by Paula, was accepted as a fait accompli. Owing to the district's rigid hierarchy and respect for Paula's authority as the director, neither the program specialists nor the coordinators questioned the efficacy of Goalbook as the ultimate solution to the problems presented. The pivotal link that could have anchored a solution like Goalbook to substantive practice change was not deeply investigated. Conversations were often in the form of "snippets." Such short discussions allowed for the acknowledgement of weighty issues (e.g., lack of connection between IEP goals and instruction, poor goal development), yet frequently skirted such matters without exploring in depth how Goalbook could concretely change educational practices or provide real pedagogical value. This surface-level treatment led to a recurring outcome—a promising solution was introduced, only to be sidelined due to either perceived or real obstacles, without an earnest effort to understand or address the underlying complexities of its integration.

The project's eventual shift towards a legalistic and bureaucratic approach became evident as Goalbook was emphasized as a tool for managing IEPs and transition plans. This focus aimed at enhancing compliance and procedural efficiency but risked overshadowing the practical educational needs of teachers and students. Concerns emerged about the separation of instructional strategies from goal development, reflecting the deeper issues within the education system. Even though such concerns were recognized and raised, the team's approach did not seem to fundamentally change the existing practices. This situation, coupled with the lack of sustained follow-through on the Goalbook initiative, indicated an inability to effectively implement changes, thus perpetuating the district's status quo when it comes to the education of students with disabilities.

Given the special education administrative team's weak political standing in the district, the path to the practical implementation of Goalbook was presumed to be obstructed by union politics. Paula frequently cited union politics as a scapegoat for anticipated challenges, such as a lack of teacher interest in Goalbook, attributing perceived challenges to the union's control over who could access the Goalbook training. Program specialists then found themselves in a bind, tasked with the promotion of Goalbook, despite its tepid reception, as actual interest with the software by teachers remained minimal. Curiously, the discourse didn't extend to dissect the root causes of this tepid uptake.

As discussions advanced, it became evident that the potential of Goalbook to act as a panacea for numerous entrenched problems was overestimated, or perhaps, not given the chance to prove otherwise. The program specialists, amidst this dynamic, were positioned as the frontline advocates for Goalbook, yet without the agency or the resources to drive its adoption effectively. This culminated in a palpable disconnect: a solution seeking a problem, a tool lacking a craftsman. Ultimately, Paula's initial push for Goalbook did not translate into a coherent strategy for its uptake or implementation. The lukewarm reception of Goalbook by the teachers, coupled with limited discussions regarding the specific issues Goalbook aimed to resolve, led to a halt in its progress. Consequently, the advancement of the Goalbook initiative was shelved.

Handbook Change Project

Handbook Change Project Introduction

In the handbook change project, the team quickly explores the issue of improving the program specialists' work which results in a resounding frustration amongst the team—the lack of clear special education procedures and programs. *Programs* refer to the various classroom settings (e.g., special day classes) and instructional approaches to meet the diverse needs of students with disabilities. After a short conversation regarding this frustration, the team identifies a solution: a handbook. The handbook change project reflects a bureaucratic and legalistic bent to the solution as it is a concrete artifact that the program specialists can point to in an effort to enforce programmatic and procedural guidelines and to show other district administrators. It would make their work visible to others (e.g., on-site administrators, district-level administrators), due to the siloing between special and general education administrators. However, due to the pandemic, the handbook change project was halted during the school year, leading to continued frustration. Even when discussed near the end of the school year, the team cannot agree on how to complete the handbook project nor how to promote the work to the teachers, thus ending the project.

The handbook change project covered four meetings between December and May: one director/coordinators meeting and three program specialists meetings. The actors in this project are Paula, the special education director; Gem, the compliance coordinator; Alma, the programs coordinator; Armando and Blair, both program specialists over K-8 schools.

Program Specialists Meeting 12/9/2020

To better support the program specialists' work, Gem and Alma decide to seek input from the program specialists concerning the content and structure of the meetings. Therefore, at the conclusion of this program specialists meeting, Gem and Alma allocate roughly 30 minutes for the program specialists to provide feedback. As the discussion unfolds, Blair shares her frustration regarding her current work. She points out that the team needs to clarify procedures across a range of special education topics (e.g., transition, placements).

> *Blair:* I feel like when COVID started we had an opportunity to get some really tight procedures … it would have been nice if we could have used this time to create some solid procedures, and at the end of COVID, after this whole year, be able to say that these are some things that we accomplished during this time.
>
> *Gem:* I will say that I do think we've done more than we think we've done in terms of tightening up our practices and programs. But you're absolutely right, there's nothing documented, and nothing we can pass along to who's coming next.

The group had intermittently discussed, over the past school year when I was not present, developing a handbook to provide clearer special education classroom definitions and procedures. Gem's comment prompts Armando to bring up the handbook once more.

> *Armando*: We know that that's needed [having documentation] because the handbook is dated back in 2013. The verbiage of what our programs need to look like or what they should look like. So those kinds of things I think we all can contribute something to.
>
> *Alma:* And that is definitely something that we want to see as well. We do want us to work to get things done, and instead of us working on it individually, to work on it as a team.

The program specialists agree that a handbook would serve teachers and themselves as a means to clarify procedures and programmatic expectations and would like to develop a handbook in upcoming meetings. Following this conversation, the handbook is set as the solution to the frustration of not clearly documenting procedures and programmatic expectations.

Director/Coordinators Meeting 2/10/2021

At the start of the meeting, Paula mentions that she is aware that work on the handbook will commence shortly, emphasizing that teachers are "clamoring for it." Alma notes that the program specialists will work on the handbook to clarify the program definitions to include specific information for teachers across various school levels in upcoming meetings.

> *Alma:* Also, what type of students would benefit [from a specific program], what would make them qualify for that [program], and what the classroom setting will look like. Not just a description, but more.
>
> *Paula:* We have a request at high school, too, [from teachers] about how do I put these kids into courses? [Who receives] inclusion support? Where are we with that?
>
> *Alma:* So, we started with pre-K and elementary [portion of the handbook] last week, and then I'm hoping we're done with middle this week, and then we'll probably take a couple of weeks to do the high school one because it's just so much more. Everybody is pitching in and has a lot to say and provide information of what it should be looking like.

Paula, based on comments from high school teachers, places an emphasis on developing the high school portion of the handbook. Due to Paula's authorative position, Alma, acknowledges the complexity of high school programs and tacitly seeks Paula's approval to continue the handbook development in a phased approach, starting with elementary and middle schools. Concurrently, the handbook's development begins to adopt a legalistic and bureaucratic approach. The focus on detailed content—including program benefits, qualifications, and classroom settings—highlights a commitment to procedural clarity and legal compliance.

Program Specialists Meeting 2/12/2021

The meeting begins with Alma telling the program specialists that Paula thinks the handbook is "a great idea." Alma then details that the team can select to work on either the elementary/preschool or the middle school portion of the handbook for the next 15 minutes. Alma prepared a Google document ahead of this meeting. She shares it with the team, displaying it on her screen. On the first page of the document is the header "Preschool & Elementary" under which there is a three-column table. The first column is labeled as "Programs Offered & Student Eligibility," the second as "Program Definition," and the third as "Program Description/Details" (e.g., classroom setup, academic and social skills to be taught) with the second page of the document having the same table, but with the header of "Middle School." On the Google document, the program specialists begin to type silently on their preferred handbook section. Roughly 10 minutes into the work session, Paula joins the meeting and asks the group whether they are in the process of addressing the adult transition section of the handbook to which Alma responds that they are not. Paula then highlights concerns about the language used in the district's transition programming materials, created by a transition teacher.

> *Paula:* I have to say, I shouldn't say more, but meeting George [a transition teacher] made me really, really sad that that's where his mind is on those students [transition students with extensive support needs]. And to put it in writing that they're low, it might be where they are, but to put it in writing … I just sent you guys some sample language about adult transition programs from other districts and saw what kind of language they were using for program descriptors, so that when you guys were working on it, you would have some ideas of what other districts are using as language.

Alma suggests that the team read the sample language when Paula pauses, stating that she needed to give some information regarding overdue IEPs. After Paula shares details on overdue IEPs and exits the meeting, the group redirects their attention to the transition section of the handbook based on Paula's suggestion. The team discusses choosing language that upholds

student dignity and improves the description of the district's transition programs. Following this discussion, Alma informs the team that work on the handbook will proceed throughout February and expresses that she is "loving this collaboration."

Program Specialists Meeting 5/28/2021

Due to the schools reopening in April during COVID, the handbook change project was put on hold for several months. This meeting starts with Gem noting who is absent, including Alma, Sandy, Aiyana, Steven, and Rose. Stemming from a larger conversation regarding changing the structure of the program specialists' work for the next school year, the handbook becomes a topic of discussion again when Blair surfaces her frustration with the absence of clear procedures and her perceived inability to influence and drive change at her school sites.

Blair: I just feel stupid sometimes when I'm in meetings and you have these teachers who think that their program, and it's mostly those SDC [special day class] programs, that think their programs are supposed to look a certain way. I went into a [IEP] meeting and, so we're talking about the SDC program and then [the teacher's] like, "my program is mod-severe." And I'm like it kind of is, but it's kind of not. But it looked silly because we all had this different impression of what that program is. I'm worried about that. I want to be able to inform the schools that I cover what this program looks like, and I want to be able to explain to a parent what this program looks like. It just seems like the change is gonna come [by] making sure our programs look alike. Making sure our teachers understand our programs. Those kinds of things are what we need to make our department better, in my opinion.

Armando: I feel like we're really scattered, because how many times have we talked about the handbook? How many times have we talked about the description, program descriptions? How many times have we talked about roles and responsibilities for each and every teacher, right? What a resource teacher should be, what is a mild-mod teacher, what are their roles and responsibilities? Those things are not in place, and therefore, we cannot do anything at this [administrative] level.

This prompts Gem to ask the program specialists to imagine that the handbook was finished and poses the following question: "What is the program specialist administrative lead on how that [the handbook] gets communicated?"

Armando: We would essentially be kind of salespeople, right? We're selling the handbook.

Blair: Well, I just think that once you have a clear description of what it is, and everybody has it, then you're all in a room talking about either what you're doing that looks like what's on paper or what you need to do. I just think that having a clear expectation is everything.

Gem pushes the team to think how they could effectively communicate the handbook, once it is completed, in a way that garners support from both administrators and teachers. Armando suggests that the greatest "salesperson" for the handbook would be Paula.

Armando: Rather than shifting the heavy lifting to program specialists, I think the biggest advocate who we have to sell a handbook, to sell all this great information, is the director.

Gem: Maybe. I'm gonna play pretend for a minute. Let's say Paula said, "okay, SDC teachers, this is what your classrooms need to look like." Do you think that they're gonna hear that?

Armando: I get a sense from some, but maybe not all, right? If she starts it that way, then we can, as program specialists, continue and move that forward, and say it was expressed to you guys that this is how a SDC classroom should be, or when we go in there and do some observations and move that forward, right? But it can't just be always the program specialist to come around and say follow the handbook. Here's the compliance.

Gem: I think the director needs to come out and send a broad message … the broad vision, and then we need to figure out how we continue the conversation with staff. I think people do go on sort of top-down messaging. That's kind of the pattern of communication that we have. You do this and I say this, and therefore this happens, and it's sort of a directive. I think it's important when you're thinking about what the program specialists' admin role is in all of this. What does that look like then? What is your job gonna look like in that context, if that's the direction we want to go? It isn't gonna happen overnight. We're not gonna be able to put up the handbook and then every problem solved.

This prompts Armando to suggest using COVID funds received by the district to facilitate a special education teacher taskforce, which could provide teachers with release time to work on the handbook to facilitate teacher uptake. Armando proposes that the teacher release time could occur once a month with the goal of these gatherings to exchange ideas, collaboratively define what an ideal program should entail, and use these insights to inform the content of the handbook. Armando emphasizes the value of this approach.

Armando: They are the ones in there [the classroom]. They're the ones who are working with students. They're the ones who are developing these programs.

Blair: But … we need to give them a handbook or something with [program's] expectations…

Given Blair's reservations and the absence of many program specialists, Gem, Blair, and Armando agree that the full team needs to revisit this issue before the fall. However, with the end of the school year fast approaching, the handbook change project is not addressed again.

Handbook Change Project Analysis

School districts commonly use handbooks to create a clear and objective foundation for programmatic and procedural norms as a means to ensure uniformity among various special education programs and teachers within the district. While handbooks might not be the most effective means to alter teacher practices, they are crucial for administrators. Handbooks translate tacit guidelines into concrete, actionable directives, providing a foundational basis for enforcing baseline standards. Additionally, handbooks also serve as a guide for administrators to spearhead improvements in teaching practices and program procedures. Much like other districts, the program specialists begin to develop a handbook within this administrative logic—a concrete document that details clear, objective guidelines that can be pointed to and enforced—and seek to a practical strengthening of their position through it.

After 20 minutes of discussion, the program specialists reached the solution of the handbook to clarify the issue of unclear procedures and poor program development. The handbook change project emerged as a solution amongst the program specialists, and particularly Blair, rather than from the top administrators. The program specialists believed that ambiguous guidelines and program expectations contributed to teachers' confusion about managing their classrooms and effectively supporting their students. To better communicate these expectations and to strengthen their authoritative position within the district and amongst the teachers, the program specialists quickly arrived at the solution of developing a handbook. The handbook solution served two purposes: first, it was a clear, concrete document that demonstrated the program specialists' efforts and value. Second, it provided a means for the program specialists to uphold procedures and program expectations.

Paula, Gem, and Alma sanctioned the handbook solution, recognizing its ability to address teacher needs and guide their understanding of program expectations. Recognizing the handbook's ability to convey a clear message, Paula leveraged it to correct a transition teacher's

derogatory portrayal of students with extensive support needs and his classroom programming. Given Paula's authoritative position, the team quickly redirected their work from its originally planned progression, starting with preschool/elementary and ending with transition programs. Though the team perceived this adjustment positively, this quick shift demonstrated poor coordination as Paula jumps in and shifts the work based on her needs. Though there was momentum behind the handbook, the team's ambition to create this comprehensive resource was repeatedly hindered by external factors, notably the reopening of schools during the pandemic, resulting in a lack of time to work on the project. This situation illustrated a significant gap between the team's goal to provide a handbook to teachers and available resources, namely time to develop the handbook, leading to a delay in its completion. As the school year ended, Blair vented her frustration about the handbook not being completed. She felt embarrassed during meetings, as she was unable to refer to the handbook to correct teachers' misunderstandings about classroom programming. Her frustration surfaced a larger concern: How to strike a balance between district messaging, teacher buy-in, and enforcement.

Blair and Armando placed an emphasis on top-down messaging once the handbook is completed. This could stem from the entrenched hierarchy often seen in this district. As such, Paula would be the ultimate authority with the program specialists acting as her enforcers. A handbook with well-defined procedures and expectations, coupled with clear directives from Paula, would strengthen the program specialists' ability to implement guidelines and set standards, minimizing the likelihood of encountering teacher resistance or pushback. Blair and Armando's insistence on the top-down messaging could be that they are looking for backup from the top of the system (e.g., Paula, Gem, Alma) by codifying clear expectations that the program specialists can then enforce. However, there is a direct tension between the program specialists looking to the top administrators and those administrators, particularly Gem, pushing the handbook messaging and work downwards to program specialists. Though Gem noted that some top-down messaging must occur, she also suggested that securing teacher support is crucial for the handbook's successful adoption, something that couldn't be achieved by Paula's messaging alone. To this end, Armando proposed a teacher task force to contribute to the handbook to promote teacher buy-in. Similar to the bottom-up origin of the handbook solution, understanding teachers' perceptions of the handbook and its messaging would enable the team to foresee its classroom implementation. This approach could result in greater teacher adoption and reduce the need for strict enforcement by the program specialists.

However, the idea of a teacher task force to tackle the issues of messaging, teacher buy-in, and enforcement was set aside. This decision is, in part, attributed to the absence of the full team during this discussion, but could have also stemmed from the team's need to provide legal and programmatic clarity. Teachers might lack the necessary skills to create a handbook or have an inadequate grasp of what constitutes a quality program, as exemplified by the transition teacher, which could potentially lead to conflicts between the program specialists and teachers. The shelved suggestion of a teacher task force, aimed at enhancing teacher buy-in through a more collaborative approach, mirrored the challenges in balancing administrative directives with classroom realities. Given the numerous absences in the team, and the insufficient time to delve deeper into this matter, the group decided to postpone the handbook revision to the next year, leaving it incomplete and unimplemented.

Summary of Findings

Across all the findings presented in this section—the reflective conversations, formal interviews, analysis of the weekly meeting, and the change projects—highlighted the existence

of two operational levels within special education administrative teams: the macro-instructional level of the special education context and the micro-communication level. At the micro-communication level, notable differences and patterns emerged between the two tiers of the system: the program specialist team and the director coordinator team. Program specialists, acting as intermediaries between the director/coordinators team and special education teachers, often find themselves sidelined in the problem-solving process. This marginalization stems from the prevalence of top-down directives, primarily issued by the director, with limited input sought from the program specialists. Consequently, the program specialists, despite their direct engagement with teachers, often find themselves sidelined, resulting in a weakened problem-solving capacity within the broader special education department.

The response of program specialists to this pattern appears conflicted, as evidenced by interview and reflective conversation data. On one hand, during program specialist meetings, they opt for silence over active engagement, communication, and constructive conflict resolution. On the other hand, they strive for solidarity and alignment with the director/coordinators team, particularly with the director. However, the director/coordinators engaged in a different pattern with the team spending approximately 50 percent of their meeting time problem solving. Though half of their meeting time is spent problem solving the majority of this time consists of episodic fast thinking oriented towards quick fixes.

But there was a concerted effort to address ongoing challenges through the various change projects. These initiatives—the handbook, visibility, Goalbook, and passport change projects—collectively constituted approximately six hours and eight minutes of meeting time, representing around 10% of the total duration and all tackled administrative issues. Based on these change projects, an identifiable interaction pattern became clear. The interactions were strongly dominated by the director who is the final arbiter on decisions and actions and deliberation of problems and solutions was often curtailed. Throughout the projects, a pattern of constant shifts in focus emerged with little closure given to the initial topic. When a problem was addressed, solutions were often championed prior to fully understanding the problems at hand. Often there was a rush to solutions and the solutions were found in a heuristic way. As such, the implementation of selected solutions encountered significant challenges, as obstacles were either overlooked or underestimated. This often resulted in initiatives being abandoned before they could be successfully executed, exacerbating feelings of frustration, lament, and demoralization among team members.

The director/coordinators team addresses important issues and strives to implement solutions aimed at enhancing special education operations in ABC District. Nevertheless, the cognitive processing described earlier undermines the team's effectiveness and chances of success. While team members recognize this situation, the leadership's reluctance to explore new approaches despite repeated failures perpetuates well-established patterns, contributing to frustration. This frustration often finds an outlet in blaming external parties including teachers, other administrators, and the quandaries inherent in special education. Consequently, it is unsurprising that the concept of team development did not emerge as a significant focus within this environment.

The cognitive and emotional aspects of problem-solving have already been identified as barriers to team effectiveness. However, the situation was compounded further by the COVID-19 pandemic, which brought significant and unprecedented challenges to educational landscape, necessitating swift adjustments and innovative solutions. The sudden shift to online learning and interactions highlighted and intensified pre-existing disparities, significantly stressing staff and

students and laying bare the strengths and flaws of the special education department's operational frameworks. The chaos engendered by the pandemic, coupled with the overwhelming number of issues, led to inconsistent problem-solving efforts. The absence of in-person communication further complicated the reconstruction of strained political relationships, reinforcing feelings of powerlessness.

Yet, this crisis and upheaval could have also provided an opportunity to reassess and reconfigure the entrenched quandaries of special education, potentially rebalancing entrenched institutional quandaries and tensions and spurring a concerted push toward resolving team dysfunctions. Ideally, the pandemic could have foregrounded a stronger focus on pedagogy, with the team concentrating on the shift to distance learning, fostered improvisation and creativity as traditional routines became obsolete, and flattened hierarchical distinctions between the director/coordinator team and the program specialist team, thus promoting shared expertise, agenda-setting, and active feedback between them. However, this transformation did not materialize. In the context of team meetings, the prevailing emphasis on compliance, hierarchical structures, and bureaucratic procedures was not just maintained but strengthened, as if these frameworks provided an anchor during the tumultuous period that the pandemic wrought. It is in this way that the institutional traditions demonstrated their resilience, maintaining their grip over the teams' functioning and prioritization of problems despite the disruptive forces that challenged their organizational underpinnings. This approach, arguably chosen for its perceived stability and familiarity amidst the uncertainty brought about by the pandemic, inadvertently stifled potential innovation and collaboration. By clinging to these conventional frameworks, the special education institution underscored its deep-rooted inclination towards operational and procedural rigidity—a tendency that, while ensuring legislative compliance and the provision of services to students with disabilities, also perpetuates a compartmentalized and hierarchical organizational culture.

This phenomenon reveals a significant tension within the institutional space of special education: the drive to adhere to legislative mandates and procedural norms, essential for safeguarding the rights and services for students with disabilities, often comes at the expense of pedagogy and collaborative empowerment. The emphasis on compliance and the resultant operational silos not only limit the scope of influence for these special education administrators but also diminish their capacity to adapt and innovate in response to emerging challenges. As such, the resilience of these institutional quandaries, even in the face of potential transformative forces like the pandemic, demonstrates the enduring challenge of reconciling the imperatives of compliance with the need for pedagogical flexibility and collaborative engagement within special education.

CHAPTER 5: CONCLUSIONS

This study set out to understand the problem solving processes (e.g., cognitive, emotional, and team interactions) of special education administrators and how the special education institution and the crisis of the COVID-19 pandemic influenced such processes (See Argyris, 1998; Bryk et al., 2015; Coburn et al., 2009; Conklin; 2006; Deshpande et al., 2005; Deming, 1986, 1994; Hackman & Wageman, 2005; Jonassen 1997, 2000; Kahneman, 2011 Lussier & Achua, 2022; Mintrop & Zumpe; 2019, Pretz et al., 2003; Scott, 2013; Skipper, 2018; Skrtic, 1991; Skritc & McCall, 2010; Taylor & Stanton, 2007). When it comes to the first research question, the findings reveal significant disparities in communication and problem-solving styles between the director/coordinators and the program specialists' teams. Program specialists are often marginalized by top-down decision-making, reducing their active

participation and leading to a reliance on silence. In contrast, director/coordinators devote considerable time to problem-solving but focus on quick fixes that often overlook deeper issues, highlighting a preference for fast thinking that perpetuates ineffective solutions. For research question two, the macro-institutional structures, such as rigid hierarchical systems and procedural adherence, significantly influence micro-communication, stifling innovation and collaborative problem-solving. This systemic rigidity is evident in change projects that frequently abandon innovative solutions due to a lack of deep understanding, reflecting entrenched institutional norms that limit effective team operation and cohesion. Finally, when it comes to research question three, the COVID-19 pandemic intensified existing disparities and operational challenges, showing the limitations of current frameworks during the shift to remote learning. The crisis potentially offered a chance to rethink entrenched practices; however, it instead reinforced existing hierarchical and procedural dependencies, preventing innovative and adaptive responses that could have emerged from a more flexible and collaborative approach.

The literature emphasizes the role of administrators as problem-solving leaders in schools and districts, capable of addressing challenges systematically (Bryk et al., 2015; LeMahieu et al., 2017) and special education administrators, though not thoroughly studied, are no different. While special education administrators play multifaceted roles, problem-solving remains a central aspect of their responsibilities. They are expected to serve as problem solvers, addressing issues raised by various stakeholders such as other district administrators, teachers, and families (Bettini et al., 2017). However, existing literature often overlooks the influence of institutional contexts on special education administrators' problem solving. Institutions, as defined by Scott (2013), are resilient social structures operating within legal, educational, and economic realms, guided by established rules and norms. Scott identifies three pillars of institutions: cultural-cognitive, regulative, and normative. Education, as an institution, serves to govern societal behavior, yet it faces inherent puzzles such as balancing diverse student needs with limited resources and reconciling principles of selection and nurture. These contradictions reveal the complex dynamics within educational systems (Friedland & Robert, 1991; Scott, 2013; Meyer & Rowan, 1977; Scott, 2005; Thornton et al., 2012).

Contradictions in institutions arise from conflicting values, norms, and beliefs, often unnoticed due to their tacit nature (Friedland & Robert, 1991; Meyer & Rowan, 1977, Scott, 2005). These contradictions manifest as institutional duality and conflict (Dover & Lawrence, 2010 & Hashemi et al., 2023), decoupling (Scott, 2005; Weick, 1976, 1995), and identity and role conflicts (Bostrom, 1980; Kahn et al., 1964; Rizzo et al., 1970, Miles, 1977). Despite their resilience (Scott, 2013), these contradictions represent vulnerabilities within institutions, potentially leading to crises or collapse (Scott, 2005), but also open spaces for agency and choice that proactive administrators can fill with problem solving activities that aim at a fuller realization of their values, goals, or dreams.

Special education, as an institution, also contains contradictions. Special education in its current form, has been significantly influenced by legislative acts such as EHA (1975) and IDEA (1990, 1997, 2001), and with the implementation of these laws there came a balance for special education teachers and administrations between compliance and providing effective pedagogy tailored to individual student needs (Skrtic, 1991; Skrtic & McCall, 2010). This leads to several contradictions or quandaries within special education. I theorized five such quandaries that are hypothesized to enable or constrain problem solving. They are the tension between compliance and pedagogy, siloing versus cross-functional collaboration, powerlessness versus power, bureaucracy versus improvisation, and workload overwhelm versus task accomplishment, all of

which have significant implications for the quality of education and the well-being of students with disabilities and their educators (see Billingsley et al., 1995; Forness & Kavale, 1994; Kramarczuk Voulgarides et al., 2021; Meyer & Rowan, 1977, 1978; Skrtic & McCall, 2010; Skipper, 2018; Weber, 1978). These quandaries help to shape the institution as those within it learn to navigate them and uphold them.

Using this special education administrative team as a window, we can see that when it comes to the quandaries above that certain tendencies prevail, particularly emphasizing compliance, and the maintenance of the status quo over pedagogical practices (Skrtic & McCall, 2010). This phenomenon underscores a critical aspect of special education as an institutional space: it is marked by a profound adherence to legislative mandates and procedural compliance (see Billingsley et al., 1995; Skrtic, 1991) which, while essential for ensuring rights and services for students with disabilities, often results in a rigid hierarchy and siloization within the educational system (Skrtic & McCall, 2010). This adherence to compliance and the consequent operational silos significantly curtails the power of the special education administrators, confining them within very limited spheres of influence.

Institutions, though enduring, are not immune to disruption, especially during crises like the COVID-19 pandemic (Scott, 2013) and quandaries, such as the ones detailed above, can become fracture lines leading to institutional deterioration or improvement. During crises, institutions can either deteriorate, leading to loss of trust and disruptions (North, 1990; Ostrom, 2015), or improve by adapting to changes, prioritizing urgent issues (North, 1990; Ostrom, 2015), or by maintaining stability through established guidelines (Farazmand, 2003; North, 1990; Ostrom, 2015). In this study, it is evident that the pandemic upended long-established routines that were previously unquestioned, shedding light on the profound influence of the special education institution on the team. For this administrative team, the transition away from in-person classrooms was not addressed during team meetings. Consequently, the change projects moved forward as though the pandemic's disruption had little impact on schooling with the team proceeding as if operations were continuing under normal circumstances. This approach mirrors a conventional school setting, emphasizing that the primary focus remains on meeting the institutional demands, such as compliance, bureaucracy, and hierarchy (Skrtic & McCall, 2010), rather than adapting to the challenges presented by the pandemic (Schein, 2010, 1999). This situation reveals a significant insight into the resilience and rigidity of institutional priorities, even in the face of significant disruptions (Scott, 2013).

The combination of the quandaries and the crisis often pressures administrators to problem solve rapidly (Kahneman, 2011). Educational leaders can be overwhelmed by the sheer number of problems brought forth by the crisis and special education administrators are no exception. With such a constant barrage of problems, fast thinking and defaulting to heuristics is expected given chaos around the special education administrators (Kahneman, 2011). However, some problems do require for the team to slow down and undertake more analytical thinking (Bryk et al., 2015; Kahneman, 2011; LeMahieu et al., 2017).

Based on the above considerations and the literature, I theorized three scenarios that could explain how special education administrators undertake problem solving within the context of crisis and the macro-institutional special education context (see Anagnostopoulos, 2006; Argyris, 1998; Ashforth, 1990; Ashforth & Lee, 1990; Billingsley et al., 1995; Bryk et al., 2015; Forness & Kavale, 1994; Hannaway, 1985; Jonassen, 2000; Kahneman, 2011; Kramarczuk Voulgarides et al., 2021; Meyer & Rowan, 1977, 1978; Mintrop & Zumpe, 2019; Pretz et al., 2003; Schein; 2010, 1999; Skrtic & McCall, 2010; Skipper, 2018; Weber, 1978).

Scenario 1: Overwhelming Chaos. In scenario one, special education administrators face overwhelming chaos during the crisis, rendering their usual problem-solving frameworks ineffective. They feel powerless and adopt a passive 'wait-and-see' approach, unable to address the unfolding situation. A sense of helplessness leaves the organization stagnant and unable to respond effectively.

Scenario 2: Adaptive Response to Crisis. The crisis prompts significant changes within the organization, leading to proactive attitudes among the special education administrators and staff. They adopt rapid problem-solving methods and experiment with novel solutions, focusing on critical challenges and embracing innovation. The organizational culture reflects a positive 'can-do' attitude, characterized by responsiveness, adaptability, improvisation, and openness to change.

Scenario 3: Institutional Inertia. The organization clings to old certainties and routines, ignoring or minimizing the crisis. Enduring power structures perpetuate this inertia, leading to superficial problem-solving efforts that focus on outdated practices and fail to address new challenges. This approach fosters frustration, inefficiency, and demoralization among staff, ultimately resulting in high turnover.

From the findings section, it is evident that the special education administrators in this study problem solve in a way that is closer to the third scenario. The team clung to institutional norms, favoring “business as usual” as they focused on problems that didn’t meet the needs of the students and teachers as they navigated the pandemic (Farazmand, 2003; North, 1990; Ostrom, 2015). This approach minimized the pandemic during problem solving events as the team focused on outdated practices that failed to address the challenges of the pandemic leading to the special education administrators to feel demoralized (Santoro, 2011, 2021) and frustrated resulting in about half of them leaving before the start of the subsequent school year. However, there were some moments—namely in the passport and handbook change projects—to slow down (Bryk et al., 2015; Kahneman, 2011; LeMahieu et al., 2017) and consider teacher feedback and how to secure teacher buy in (Kimbell & Street, 2009), but these bursts were short lived and did not effectively change the problem solving and arrived solutions of the team. It is a credit to the team that they did undertake longer periods of problem-solving given the ill-defined problems (Jonassen, 2000; Pretz et al., 2003) they faced and the chaos of the pandemic (Reyes-Guerra et al., 2021; Whitla, 2003). Yet given the chaos of the pandemic and with instruction ceasing in classrooms the team was mainly worried about compliance, IEPs, goals, that is, well-trodden pathways to improving Special education delivery. They, as we saw, strove to carry on with business as usual.

With these dimensions revealed, I ask myself: Why does this special education administrative team problem solve in a manner closer to scenario three? What was the institutions’ influence on the problem-solving actions of the team and why didn't this team, given the pandemic, prioritize feedback from teachers on solutions, flatten the hierarchy, enhance improvisation and creativity, and focus on pedagogy over compliance paperwork? Is there a prospect to increase the problem-solving capacity of these administrators given the context under which they problem solve? If the people I studied are meant to be the ultimate special education problem solvers of their district, then how do we get them to a space where they can slow down and be more analytical, when needed, given the weighty problems they face and the outside pressures of the special education context and crisis?

To answer these questions, I undertook participant observation (Brannan & Oultram, 2012; DeWalt & DeWalt, 2011; Schensul & LeCompte, 2013) and embedded myself with this

special education administrative team over the course of the 2020-2021 school year. From this work, I have reached two main conclusions based on the findings:

1) The special education institutional context and particularly the regulatory framework of special education (e.g., compliance) proved to be a strong and influential force over the team, often pushing other needs (e.g., pedagogy) to the side.
2) There needs to be better training for administrators when it comes to productive problem solving.

The power of the special education institution. During times of crisis, there can be "flex" when it comes to the contradictions or quandaries (Friedland & Robert, 1991; Scott, 2013; Meyer & Rowan, 1977; Scott, 2005; Thornton et al., 2012). This suggests that, rather than adhering strictly to entrenched institutional norms—such as compliance, hierarchy, and paperwork—the team could have balanced their priorities to confront the challenges posed by the pandemic more directly (e.g., adapting teaching methods and service delivery for online platforms). While this does not imply a complete abandonment of compliance and paperwork during crises, it does suggest a strategic reprioritization to address urgent issues raised by teachers and stakeholders. However, despite the pandemic-induced shift to online learning, the administrative focus remained predominantly on bureaucratic tasks, such as managing IEPs.

These findings, when viewed through the lens of institutional theory (Scott, 2013; 2005) and informed by Schein's (2010; 1999) insights on organizational culture, highlight how entrenched structures and norms within the special education institution constrain problem-solving efforts of this special education administrative team, particularly in times of crisis. The findings of this study underscore a systemic failure to prioritize adaptation and responsiveness over traditional institutional requirements (North, 1990; Ostrom, 2015), despite the pandemic crisis. Schein's work (2010; 1999) suggests that this is indicative of a deeper issue: an organizational culture overly influenced by the special education institution leading to defensiveness, resistant to innovation and overly reliant on established protocols. This culture, reinforced by leadership that focuses on stability rather than adaptation, affects this special education administrative team's ability to effectively respond to the needs of teachers and students during critical times.

Productive problem solving. The special education institutional context significantly shaped the team's approaches to prioritizing and problem-solving, leading to challenges in adopting a more measured and analytical approach to the issues faced (Kahneman, 2011). Often, the team would lean towards heuristic thinking (Kahneman, 2011), applying established solutions that might not fully capture the nuances of the specific challenges, as seen in the passport change and Goalbook change projects. This approach reflects a natural inclination towards familiar solutions and processes (Kahneman, 2011).

Practical Implications

The elements discussed above combine to create an environment where bureaucratic processes overshadow engagement with more pressing or urgent problems, suggesting a need for systemic change to better balance the institution's priorities with the actual needs of students and teachers. The dynamics of these challenges rendered it exceedingly difficult for the special education administrators in this study to effectively address the immediate issues and urgencies precipitated by the pandemic and the resultant chaos. To counteract this imbalance, finding ways to ensure that compliance regimes, originally designed to enhance instructional quality, do not inadvertently prioritize bureaucracy over the direct support of teachers and students. This shift in focus reveals a misalignment where the mechanisms meant to aid instruction now seem to

demand service to compliance above educational needs. The strength of the special education institution and the inherent dysfunctions (e.g., the quandaries) within it have been highlighted, particularly under crisis conditions with the focus of the team remained on institutional goals and compliance requirements, overriding creative experimentation, and collaboration with other stakeholders, and pedagogy (Friedland & Robert, 1991; Meyer & Rowan, 1977, Scott, 2005, 2013; Thornton et al., 2012).

The existing literature indicates that the pattern of an excessive focus on the regulatory dimensions of special education—namely compliance, bureaucracy, and extensive paperwork—may be a more prevalent issue than previously described (see Billingsley, 2004, Billingsley & Bettini, 2019; Billingsley et al., 1993; Brunsting et al., 2014; 1995; Morvant et al, 1995; Nance & Calabrese, 2009; Paperwork in Special Education Report, 2002). This phenomenon appears particularly pronounced within this team due to an undue emphasis on procedural quandaries (e.g., compliance and paperwork; see Billingsley, 2004, Billingsley & Bettini, 2019; Billingsley et al., 1993; Brunsting et al., 2014; 1995; Morvant et al, 1995; Nance & Calabrese, 2009; Paperwork in Special Education Report, 2002). This situation underscores the profound influence of institutional frameworks and dysfunctional structures, which effectively blocked the team's ability to respond to urgent needs during the crisis. This obstruction highlights the critical nature of the moment's urgencies. Should this team serve as a representative example, describing the emphasis on such regulatory aspects—paperwork and compliance—as merely an "overemphasis" might actually be an understatement; indeed, the institutional structures manifest substantial influence over the problem-solving processes.

By examining the dynamics of this special education administrative team as they problem solved, we are provided with a window into how the institutional context of special education influenced and complicated their problem-solving processes. This overemphasis on paperwork and adherence to regulations, as corroborated by existing literature (see Billingsley, 2004, Billingsley & Bettini, 2019; Billingsley et al., 1993; Brunsting et al., 2014; 1995; Morvant et al, 1995; Nance & Calabrese, 2009; Paperwork in Special Education Report, 2002), was starkly evident and did not align with the immediate demands of the crisis at hand. These findings underscore the critical challenges and limitations within the structures of the special education institutional context, revealing the urgent need for adaptive strategies that better accommodate unforeseen challenges, crises, and the needs of stakeholders.

Limitations

This study contributes to theory by uncovering the cognitive and emotional processes, as well as team interactions, among special education administrators engaged in problem-solving (see Argyris, 1998; Ashforth, 1990; Ashforth & Lee, 1990; Billingsley et al., 1995; Bryk et al., 2015; Forness & Kavale, 1994; Hannaway, 1985; Jonassen, 2000; Kahneman, 2011; Kramarczuk Voulgarides et al., 2021; Meyer & Rowan, 1977, 1978; Mintrop & Zumpe, 2019; Pretz et al., 2003; Schein; 2010, 1999; Weber, 1978). It explores how these processes were influenced by macro-institutional factors amidst the intense pressure and uncertainty of the COVID-19 crisis, providing valuable insights for practical design knowledge transferable to similar school contexts. However, while the literature suggests that certain patterns observed in this team, such as the overemphasis on compliance and paperwork, may be common (see Billingsley, 2004, Billingsley & Bettini, 2019; Billingsley et al., 1993; Brunsting et al., 2014; 1995; Morvant et al, 1995; Nance & Calabrese, 2009; Paperwork in Special Education Report, 2002), the findings cannot be generalized to all special education administrative teams. The use of participant observation (Brannan & Oultram, 2012; DeWalt & DeWalt, 2011; Schensul & LeCompte, 2013),

formal interviews, and reflective conversations (Feldman, 1999; Schensul & LeCompte, 2013) may have influenced the findings, potentially leading participants to prioritize certain issues guided by the researcher's questions during reflective conversations and formal interviews. Therefore, it's important to acknowledge the potential impact of my actions and questions on participants' responses and actions.

Future Research

This study offers an unprecedented glimpse into the complexity of problem-solving (Funke et al., 2018; Jonassen, 2000; Pretz et al., 2003) for a special education administration team, highlighting the interplay between cognitive strategies, emotional responses, the team's interactions, the crisis of the pandemic, and the special education institution context (see Argyris, 1998; Ashforth, 1990; Ashforth & Lee, 1990; Billingsley et al., 1995; Bryk et al., 2015; Forness & Kavale, 1994; Hannaway, 1985; Jonassen, 2000; Kahneman, 2011; Kramarczuk Voulgarides et al., 2021; Meyer & Rowan, 1977, 1978; Mintrop & Zumpe, 2019; Pretz et al., 2003; Schein; 2010, 1999; Weber, 1978). Given the complexity of the situation faced by these administrators, there are several possible paths of research that could illuminate the underlying mechanisms that shape administrative behaviors, problem-solving processes in crisis situations, and the impact of institutional constraints on adaptive problem-solving. Therefore, I see two research avenues: one centered on cultivating effective problem-solving skills generally for educational leaders who support special education, and the other concentrated on examining the influence of the special education institutional context on administrators as they engage in problem-solving.

Path 1: Productive Problem Solving

For those administrators already in the field, the integration of Continuous Improvement (CI) principles—developing a shared understanding of a problem, use of evidence to understand the root causes of a problem and if the reach solution is effective, incorporating stakeholder feedback—into the ongoing practices of administrators, with a particular focus on the special education context (Bryk et al., 2015). By establishing external support for such CI efforts via Research-Practice Partnerships (Bryk et al., 2015; Coburn & Penuel, 2016; Coburn et al., 2013; Penuel & Gallagher, 2017), such research would seek to create a symbiotic relationship between educational researchers and practitioners, enhancing the practical application of CI methodologies in leadership and problem-solving processes (Bryk et al., 2015; Mintrop & Zumpe, 2019; Mintrop et al., forthcoming). It would also investigate strategies for incorporating CI into administrative practices, especially tailored to address the challenges inherent in special education settings. Such work could help the special education administrative teams to address the current challenges faced, particularly in crisis situations like the pandemic, and promote adaptive, responsive, and informed leadership practices that better serve the needs of teachers and students.

For prospective educational leaders, future research could explore how CI principles can be embedded into their curriculum and experiential learning opportunities of educational leadership programs (Mintrop & Zumpe, 2019). This would include the evaluation of pedagogical strategies such as case studies, simulations, and project-based learning, all designed to impart a practical understanding of CI processes (Bryk et al., 2015; Mintrop & Zumpe, 2019; Mintrop et al., forthcoming). Additionally, future research in this area would assess the impact of real-world practicum experiences facilitated through partnerships with schools and districts, focusing on how these experiences prepare students for the challenges of leadership in educational settings, particularly in special education.

Path 2: The Special Education Institutional Context

Future research could provide an in-depth examination of the special education institutional framework's impact on the administrative practices and problem-solving processes across multiple school districts and states that are both similar (e.g., under resourced, strong union) and dissimilar (e.g., highly resourced, weak union) to ABC school district. This research should aim to uncover how the current emphasis on compliance, regulatory mandates, and procedural adherence influences administrators' priorities, potentially at the expense of pedagogical innovation, teacher support, and student-centered learning initiatives (Friedland & Robert, 1991; Scott, 2013; Meyer & Rowan, 1977; Scott, 2005; Thornton et al., 2012). Comparative studies of these special education administrative teams could be designed to contrast different educational settings, providing a broader perspective on how varying institutional pressures and frameworks shape administrative behaviors and policies. Such studies could help identify leverage points for balancing regulatory compliance with educational innovation and improvement.

Research in this domain should aim to uncover and address the deep-seated quandaries within the special education institution (Friedland & Robert, 1991; Scott, 2013; Meyer & Rowan, 1977; Scott, 2005; Thornton et al., 2012) that hinder effective problem-solving (Bryk et al., 2015; Mintrop & Zumpe, 2019; Mintrop et al., forthcoming). This could involve analyzing the alignment, or misalignment, between institutional norms, regulatory requirements, and the actual needs of teachers and students. Studies of this nature could explore potential reforms that encourage a shift towards more adaptable, responsive, and inclusive educational practices. Ultimately the goal of such research would be to propose actionable, evidence-based strategies for restructuring special education systems to better serve the diverse needs of all stakeholders, particularly in accommodating and addressing unforeseen challenges and crises.

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Appendix A

Program Specialists Interview Protocols

Interview 1:

1. How do you see your role currently as a program specialist?
2. If you had the chance to re-envision your role in any way, how would you re-envision it?
    a. What would you really like to do with your role as a program specialist that you may or may not be doing?
3. Tell me your thoughts regarding compliance (e.g., IEP paperwork, overdue IEPs)
4. How do you see teaching and learning at the school sites you work with?
5. Do you see any barriers or challenges to working as a program specialist?
6. Can you tell me more about the format of the weekly meetings you lead with school sites? What does that look like?
    a. What percentage of time in these weekly meetings do you think is spent on compliance?
    b. What percentage of time is spent on teaching?
    c. What else comes up during these meetings?
7. How much control do you have over the agendas for these meetings?
8. Is there anything you would like to do at these meetings that you haven't had time or space to do?

Interview 2:

1. What do you think the mission of the district is when it comes to special education?
2. Which needs do you feel are more urgent to address teacher needs or district needs? Do you feel these are often aligned?
3. Think about your school site. What would be needed to work on a longer-term, site-specific issue?
4. How do you handle a longer-term, site-specific issue? Think about inclusion and restructuring programs.
5. During the program specialists' meeting, is there a space to bring forth longer-term, site-based issues and strategize around them? Is this something you would like to do?
6. What prevents or enables the program specialist team to strategize on these longer-term site issues? What would be needed to make this more productive?
7. How could the coordinators and directors help to address these longer-term issues?
8. What do you believe is needed to influence or change teachers' practices?

Interview 3:

1. Why did you become a program specialist? What keeps you in the role?
2. How do you imagine pedagogy in the classrooms? How are students being served?
3. Do you feel like you are able to focus on pedagogy?
    a. What if IEPs weren't a concern?
    b. What keeps you from focusing on it?
4. Has a teacher ever brought a difficulty or challenge they have had with pedagogy?

    a. How did you help them?
5. Do you think it serves students to be focused on IEPs?
6. What could be done to balance the focus on IEPs and pedagogy?
7. What could your role be in this change?

Appendix B

Director/Coordinator Interview Protocols

Interview 1:

1. What is your current role with ABC school district?
2. How do you see the current role of the program specialist at a school site?
3. If you had the chance to re-envision the program specialists' role in any way. How would you re-envision it?
4. What kind of support do you lend to the program specialist? Is there anything you would like to add or change to the support you give?
5. Can you tell me the format of the program specialists' meetings that you help lead?
    a. What percentage of time in these weekly meetings do you think is spent on compliance?
    b. What percentage of time is spent on other issues such as teaching?
    c. What else comes up during these meetings?
6. For coordinators: How much control do you have over the agendas for these meetings?
7. Is there anything you would like to do at these meetings that you haven't had time or space to do?

Interview 2:

1. What do you think the mission of the district is when it comes to special education?
2. Which needs do you feel are more urgent to address teacher needs or district needs? Do you feel these are often aligned?
3. Think about the program specialists' meeting. Do you think this is a space to work on longer-term, school-specific issues or district-specific issues?
    a. Is this something you would like to do?
4. How do you/would you handle a longer-term school site or district-specific issue? Think about inclusion, and restructuring programs.
5. What prevents or enables the program specialist team, including you and the other coordinator/directors, to strategize on these longer-term site issues? What would be needed to make this more productive?
6. What can the coordinators and directors help with to address these longer-term issues?
7. What do you believe is needed to influence or change teacher's practice?

Interview 3:

1. Why did you become a coordinator or director? What keeps you in the role?
2. How do you imagine pedagogy in the classrooms? How are students being served?
3. How do you see compliance issues in the district?
4. Which do you think receives more focus in the district, compliance issues or pedagogy?
    a. Do you feel like these two are in balance? Why or why not?
    b. How would you ideally balance them?
    c. What could your role be in this change?

Appendix C

Interview and Reflective Conversation Data Analysis Codebook

Code	*Definition*	*Example*
Compliance vs Pedagogy • parent code	This code highlights the tension between following regulatory requirements (compliance) and focusing on educational methods and practices (pedagogy). It encapsulates the dilemma faced by administrators in balancing bureaucratic demands, often in the form of IEP paperwork and meeting, with pedagogical objectives.	• "We are never compliant. Why won't the teachers just do their IEPs?" • "Compliance is important, but I wish we could talk about instruction more." • "Instruction is way more important that compliance, most good teachers aren't usually the most compliant."
Siloization vs Cross-functional collaboration • parent code ----------	Siloization refers to the tendency of teams or departments to operate in isolation (balkanization/siloization). Cross-functional Collaboration captures instances of effective collaboration and integration among teams. ----------	• "We are never included in district decision-making." • "The schools don't care about special education." • "We work well together. We have great conversations about how to support every student." ----------
Power vs Powerlessness • child code	This code captures the impact of external and internal politics on team actions and decisions. It includes considerations of power dynamics, alliances, and the influence of different stakeholder groups on the special education administrators' thoughts and actions.	• "The pressure from the community and parents has been mounting, especially regarding inclusion policies." • "There's a lot of resistance from the union regarding the new instructional strategies we're trying to implement." • "I feel like we can really make moves with this initiative. I see the teachers and principals falling into line with what we want."
Bureaucracy vs Improvisation • parent code	This code refers to the complex administrative systems and procedures within an organization, often characterized by rigid rules, hierarchy, and paperwork, which can impact decision-making and operational efficiency versus having the capacity to adapt and make spontaneous decisions, prioritizing flexibility, creativity, and a willingness to take risks, enabling individuals or groups to respond swiftly to new challenges or	• "We have to ask for permission first to do anything. I don't want to make the wrong choice or say the wrong thing." • "I don't want to overstep my role." • "There is so much paperwork that we are expected to do…it's too much." • "I know this is a wild idea, but what if we try something completely new?"

	opportunities without strict adherence to established protocols or procedures.	• "Teachers are clamoring for support. Why don't we get together a group of expert teachers to help develop protocols or materials for this issue?"
Workload Overwhelm vs Task Accomplishment • Parent code	Workload Overwhelm describes the state of having too many tasks or responsibilities, leading to a sense of being overwhelmed and potentially affecting performance and well-being. On the other side, Task Accomplishment means that the team achieves goals, objectives, or tasks that have been assigned or set out to be accomplished. The team feels that they have been successful in completing tasks and that the tasks were fruitful or beneficial to them either individually or collectively as a team.	• "I am in meetings all day; I never get to eat lunch." • "I have to do weekly school-site meetings, observations, IEP meetings, program specialists' meetings, and paperwork…I barely have time to think." • "There's just too much to do." • "Wow, I am proud of what we have done here. I think this will be helpful for future planning." • "It was a lot of work, but now that we have a handbook, we can really fix classroom teaching."
Special Education Teacher Shortage versus Sufficient Basic Capacity • Parent code	The special education teacher shortage code refers to the special education teacher shortage and its impact or nonimpact on the team. This may include reasons for the shortage, its impact on schools and students, or potential solutions and strategies to address it. The sufficient basic capacity code refers to having enough resources, including having enough teachers to complete core activities such as completing IEPs, enough teachers to fill classrooms and teach.	• "We don't have enough special education teachers for all of our classrooms." • "We have a lot of long-term subs or people on alternative credentials, so they aren't trained to be good teachers." • "We got all our IEPs done! We finally have enough teachers to get them done."
Pandemic-induced Stressors • Parent code --- *Adapting to Remote learning* • child code --- *Maintaining Compliance via Zoom* • child code	This code refers to the unique challenges and pressures faced by the special education administrative team due to the COVID-19 pandemic. --- This stressor is spoken about as not knowing how to support teachers or students during remote learning and managing and meeting the emotional needs of special education students and their teachers. --- This stressor is spoken about when it comes to handling IEP meetings and paperwork over Zoom. This could also relate to giving and procuring services	• No one has helped us with anything during COVID. • The Dept. of Education has been useless. --- • "People are constantly asking for help when it comes to distance learning, and I don't know what to do to help them." • "How do you meet students' educational needs over Zoom?" --- • "How do we have effective IEPs and IEP meetings on Zoom?"

	for students (e.g., occupational therapy, speech and language), managing overdue IEPs, conducting psychological and academic testing.	• "How do we provide physical therapy over Zoom?" • "Are psychological tests even valid if they are done on Zoom? They should be done in person…"
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Mitigating isolation • child code	This stressor speaks to establishing and maintaining interpersonal relationships over Zoom.	• "I miss seeing my colleagues in person. I don't feel connected to them as I did before the pandemic."

Appendix D

Meeting Flow Coding Framework

	Code	***Definition***	***Example***
Topic Shifts	*Haphazard transitions*	Topics change abruptly or rapidly often without closure or resolution. Discussion lacks coherence and may feel disjointed or chaotic. Participants may struggle to follow the conversation due to frequent topic changes. Tangents come up regularly and are often followed without resolving the original topic.	• Conversations jump from one subject to another with little connection or relevance. • Participants may appear confused or disengaged, struggling to keep up with the shifting topics.
	Limited continuity transitions	Topics transition with some attempt at connection or segue. Discussion maintains a degree of coherence but may still feel somewhat disjointed. Participants can generally follow the conversation, although some effort may be required to connect the topics.	• Topics transition with some attempt to relate them to each other, though transitions may be somewhat abrupt. • Discussion may have moments of coherence and focus, interspersed with periods of tangential exploration. • Participants can generally track the conversation but may occasionally lose the thread due to sudden shifts.
	Transition flows	Topics transition seamlessly, with clear and natural connections between them. Discussion maintains coherence and logical progression, with topics building upon each other even when tangents are introduced. Participants can effortlessly follow the conversation, experiencing a sense of flow.	• Topics transition smoothly, with clear bridges or segues that maintain the coherence of the conversation. • Discussion flows naturally, with topics unfolding in a logical sequence and building upon each other. • Participants can track the conversation throughout.
Cognitive Processes			
Inquiry	*No problem definition*	The team doesn't define the problem. No steps are taken to make the problem concrete or actionable.	• "There have been issues with the teacher's IEPs." • "Teachers are always complaining about something."
	Specific problem	The team defines the problem in concrete and specific ways that make it actionable for the team to solve. The team focuses on one problem.	• "Some teachers are failing to affirm and attest their IEPs within the mandated 7-day deadline. We need to understand why the teachers are not affirming and attesting their IEPs."
	Information	The team has sufficient, limited, or no information to understand the problem.	• "Here, look at this piece of data." • "We don't have anything to show that this is a problem, but I know it is."

			• "I have been told it's a problem, but I don't know why."
	Diffuse/ fuzzy problem	The team defines the problem in diffuse/fuzzy terms, focusing on many broad problem areas rather than a concrete problem. The diffuse/fuzzy definition makes it difficult for team to take any course of action to solving the problem.	• "Teachers aren't doing their IEPs. They just don't see why it is so important to do IEP paperwork; it's because the union makes it so they don't care about the IEPs or doing paperwork."
Solution Inquiry	*Clear solution*	The team understand what needs to be done to solve the problem and are clear on what their individual roles and responsibilities are in the process in enacting the solution.	This might include: • All team members are clear on the proposed solutions, and all agree that they are the best course of action. • Team members are clear on what to do to solve the problem and agree to the solution. • The team has a clear idea on their role/responsibilities in enacting the solution.
	Fuzzy/ vague solution	The team has a vague or fuzzy understanding of what needs to be done to solve the problem and what their roles/responsibilities are in the process in enacting the solution.	This might include: • (Some) Team members have a vague understanding of the proposed solutions or do not agree with the solutions. • Team members only have a vague idea of what to do to solve the problem. • The team has a vague idea regarding their role/responsibilities in enacting the solution.
	No solution	The team has not reached a solution to the problem, nor do they have or know their roles/responsibilities in the process enacting the solution.	This might include: • The team doesn't detail who does what to enact a solution. • Team doesn't know what the solution is. • The team doesn't agree on the solution.
Shared Understanding	*Full, shared understanding*	All team members to have a clear and consistent idea of what the problem is and their roles and responsibilities in the problem-solving process.	This might include: • All team members agreeing on what the problem is and why it is occurring.
	Limited shared understanding	Team members have a vague understanding of what the problem is and their roles and	This might include: • Some members agree on what the problem is or why it is occurring.

		responsibilities in the problem-solving process.	
	No shared understanding	The team has no understanding of what the problem is or what their roles and responsibilities are in the problem-solving process.	This might include: • The team doesn't agree on what the problem is or why it is occurring.
Root Causes	*Deeper causes*	The team sees the causes of a problem below the symptoms.	• "The teachers aren't affirming and attesting their IEPs. There must be reasons other than them being lazy. We must figure out why they aren't doing it."
	Symptoms	The team sees just the symptoms of a problem.	• "The teachers just aren't affirming or attesting the IEPs. We got to get them to do this."
	No understanding	The team can't see the causes or symptoms of problems.	• "I don't get why teachers do what they do."
	Moralize	The team moralizes problems.	• "If we don't solve this problem, we are failures and we are failing our kids."
	No-fault analysis	The sees the problem from a dispassionate stance.	• "We can blame teachers till the cows come home, but the problem is deeper than any one person."
Feedback	*Consideration for end users*	The team considers how end users will perceive and implement the solution reached.	• "How do we think teachers will see this solution? Will they think it is just another thing to do?"
	Solicits input & feedback	The team solicits feedback from end users to adjust solutions and better understand the problem.	• "When I spoke to the teachers at XYZ school, they told me that they already do something like what we are proposing." • "Maybe we should survey teachers to get their perspective on this problem."
	Uses feedback	The team uses feedback from end users to adjust the solution to better meet the needs of the end users.	• "When I spoke to the teachers at XYZ school, they told me that they already do something like what we are proposing. I think we should check out their system for ideas before rolling this out to everyone in the district."
	Team doesn't solicit feedback	The team doesn't solicit feedback on solutions and/or does not attempt to speak with end users regarding the problem.	This might include: • No attempt being made to speak with teachers about the problems plaguing them. • No attempt to speak with teachers regarding the implementation about solutions reached.

	Team doesn't use feedback	Team doesn't use feedback to adjust solutions reached even if they do solicit it.	• "Even though the teachers said that doing an IEP passport is doing double work, I think we should have the teachers implement it anyway because not all teachers are doing their best on the original IEPs."
Use of Evidence	*Monitoring*	Data are used to monitor goals and solutions.	This might include: • A checklist • A survey • A goal sheet
		Emotional Codes	
	Competing responsibilities	The team feels hesitant to trade off priorities.	• "I feel like we have to focus on everything." • "We can't just focus on instruction. What about IEP paperwork?"
	Hopelessness and negativity	The team feels negative about focus on problems.	• "There are only ever problems. How can we possibly solve them all?" • "We are letting our kids down because we can't solve these things."
	Problem denial or avoidance	The team denied or avoids admitting problems.	• "Is that really a problem we need to solve? That sounds like a school issue." • "I know the superintendent thinks IEPs are a problem, but they really aren't."
	Locus of control	The team sees causes and problems over which we feel internal influence.	• "I think we can do something about teacher motivation." • "I feel like we can influence those teachers who are motivated to help with instruction."
	Limited locus of control	The team feels as if they can't control or have limited control over causes or problems.	• "We can't do anything about that problem." • "My influence only goes so far."
	Engagement	The team is engaged in conversations, limitedly engaged, or no engagement.	• Active participation, such as speaking up, using the chat, raising hand to comment, asking questions. • Some engagement, being called on to talk, may use the chat functions, or speak limitedly (only a sentence or two at a time), asking some questions. • No engagement, camera turned off, silence, no one is speaking up or asking questions.

	Externalize	The team locates problems in other actors or factors.	• "It's the union's fault that teachers don't care about teaching." • "It's all about the funding."
	Identifying drivers of change	The team names powerful change forces.	This might include: • Identifying what motivates the team or various stakeholders. • Understanding what it really takes to motivate people to change.
	Defensiveness	The team members become defensive of themselves or their work.	• "Do you think I can take on another thing?" • "I do my job well, it's the ELD department that isn't following through."
	Lament	The team expresses sorrow or disappointment over a problem or solution that was not implemented by end users (e.g., something that has happened or something that has not happened as expected).	• "The teachers never do anything we ask of them!"
	Demoralized	The team feels as if their efforts to tackle problems are thwarted or diminished.	This might include: • Apathy: "Why bother? Nothing we do will make a difference." • Loss of confidence: "I used to be so sure that I was an effective admin, but now I don't know." • Helplessness: "I feel like I can't do anything; I want to leave the field of special education." • Silences by the team.
	Energized	The team feels excited to tackle problems and find solutions.	• "I think we can make a difference on this." • "I am so glad we found a solution to this problem. I think the teachers will really benefit and I am excited to get started on the solution."
	Empowerment	Giving individuals the resources, authority, and support they need to make decisions and take action.	This might include: • Letting a team member take the lead on a solution. • Helping team members to access needed resources. • Providing moral support. • Allowing the team to take action in a way that fits their strengths.
	Seeing strengths	The team sees strengths in self and others.	This might include: • Recognizing that one team member is very good at communicating • Team members recognize that they have strengths that contribute to the

			overall positive functioning of the team.
	Controlled delegation of tasks	The process of assigning tasks and responsibilities to others while maintaining control over their execution.	• "This is what I need you all to do; we need to communicate the same message to all teachers, so they don't try to use subtle language differences against us. I will write up exactly what you need to say when you speak to your teachers."
	Directed communication	Communication that is intended to provide instruction, guidance, or direction.	This might include: • Someone in a position of authority telling others what to do and how to carry out the task.
	Centralized decision-making	The decisions are made by a central authority figure (e.g., special education director) rather than by the individuals directly involved.	• "I can't do anything about it because the director hasn't told us what to do yet regarding the problem." • "The director makes all the decisions, and they don't really listen to us, so we can't do anything about the problem right now."
	Dereference to the chain of command	People lower on the chain defer to the top decisions maker(s). Will not proceed with solutions or problem-solving without the direct go-ahead from the top.	• "I can't help you with that, I haven't heard from the superintendent regarding what to do." • "I hear you about the solution you want, but the special education director wants us to do it this way, so that's how we have to do it."
	Formal authority structures	A system of rules and procedures that define the relationships of power and authority within an organization.	This might include: • An organizational flowchart with clearly delineated positions of authority.
	Collaboration	The team works to achieve a common goal.	This might include: • The team knows how to work toward the common goal via clearly defined roles/responsibilities and an understanding of how to enact the goal in way that feels genuine to the team members. • Taking into consideration what the team members want to do when it comes to solutions.
	Shared decision making	The team members all have an equal say in making decisions that impact them and those they work with.	This might include: • All voices being heard during the problem-solving process. • Understanding how enacting a solution will affect those involved.

	Positivity	The team feels hopeful or positive about their work and the work of their teammates.	• "I ran a really good meeting yesterday." • "This discussion was a lot of fun; I love getting to talk to you all about these things."
	Cooperative problem-solving	The team works together to find a solution to a problem.	This might include: • All team members engage in conversation about the possible solutions. • The team reaches a consensus about solutions and agree to enact the solutions even if they don't agree.

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