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Despite federal policy and litigation, the continued placement of students with extensive support needs (ESN) in separate classes and schools continues across the United States. Since the enactment of the Education for All Handicapped Children Act (1975), there has been a continuous stream of research regarding the positive effects of including students with ESN in regular classes and the adverse realities of educating students with ESN in more restrictive placements (i.e., separate classes and schools; Gee et al., 2020). Nevertheless, this problem persists. Wehmeyer and Kurth (2021) posit that three generations of failed inclusive practices have mistakenly focused on individual students in classrooms, disregarding that classrooms and schools are part of a more extensive system. Therefore, the problem of limited access for students with ESN necessitates systemic change efforts at district and state levels that include a long-term commitment to sustainability (Agran et al., 2020; Sailor & Roger, 2005). One way to assist in effecting change on a systemic level is through coaching.

This qualitative case study focuses on the role of one district inclusive education coach working within a successful district-wide systemic change endeavor to include students with ESN in regular education classes. The researcher used grounded theory methodology to construct a preliminary theory explaining the coach's role, which emerged from the data collected through six days of shadowing the coach with field notes, semi-structured interviews of the coach and several people with whom the coach interacted, and a review of relevant documents.

The preliminary theory describes eight concurrent strategies the coach uses to understand the context and build capacity at the classroom, school, district, and state levels. These strategies help the coach increase students' membership, participation, and learning opportunities. The

researcher also describes the coach's unique qualities and experiences and how they assist the coach in reaching his goals.

THE ROLE OF AN INCLUSIVE EDUCATION COACH WITHIN A DISTRICT-WIDE SUCCESSFUL INCLUSIVE INSTRUCTION SYSTEMIC CHANGE ENDEAVOR: A CASE STUDY

by

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Dr. Diane Ryndak
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DEDICATION

To my family, Brad, Samantha, and Jocilyn, for believing in me and supporting me throughout this process. To Zachary, who is never far from my thoughts, especially when I advocate for inclusion and equity for all. I will not stop until every space is a safe space where you might have belonged and participated, just like everyone else. I miss you, always. To my parents, Donald and Dorothy, and my siblings, Debbi, Dennis, and Darleen, for all your encouragement and celebrating all the milestones.

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APPROVAL PAGE

This dissertation written by Dale Baker has been approved by the following committee of the Faculty of The Graduate School at The University of North Carolina at Greensboro.

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TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER I: INTRODUCTION

In the United States, the education of students with disabilities, including those with extensive support needs (ESN) (i.e., significant cognitive disability, autism, developmental disabilities, or multiple disabilities) in public schools, has been an ongoing battle (Crissey, 1975; Spalding & Pratt, 2015). Although there has been some improvement in services provided, parents of students with ESN continue to advocate and fight for their children's rights to receive a free and appropriate education in the least restrictive environment (i.e., alongside non-disabled peers, in a regular education environment, with access to the general education curriculum).

The inclusion of students with disabilities in public schools is the result of a culmination of laws (e.g., Education for All Handicapped Children Act, 1975 [EAHCA]; Individuals with Disabilities Education Act, 2004) and litigation (e.g., *Brown v Board of Education*, 1954) that have transpired over the past several decades. The laws describe the educational rights of students with disabilities and the responsibilities of educational agencies in meeting those rights, and the case law provides insights into how the Supreme Court interprets those laws. Additionally, research has identified that evidence-based interventions such as embedded systematic instruction (Bowman et al., 2020; Jimenez & Kamei, 2015; McDonnell et al., 2002), collaborative interdisciplinary teaming (Zagona, 2023), high-leverage practices for students with extensive support needs (Pennington et al., 2023), and peer supports (Carter et al., 2016) have improved educational outcomes for students with disabilities. These evidence-based interventions are the means in which educational agencies can provide a free and appropriate education to all students, including those with disabilities, and ensure that they are educated in the least restrictive environment through the provision of appropriate evidence-based supports

and services., and ensure that they are educated in the least restrictive environment through the provision of appropriate evidence-based supports and services.

The benefits of including students with disabilities, including students with ESN, in regular education classes also have been documented through research. Research findings demonstrate that when students with ESN have been educated in regular classes with access to the general education curriculum alongside their same age- and grade-level classmates without IEPs, they had improved social skills (Mansouri et al., 2022), academic skills (Cosier et al., 2013; Gee et al., 2020; Kleinert et al., 2015; Mansouri et al., 2022), and post-school outcomes (Ryndak et al., 2010). Further, research has demonstrated the disadvantages of teaching students with ESN in separate classes and schools (Jackson et al., 2022; Ryndak et al., 1999; Towes et al., 2020; Zagona et al., 2022). Nevertheless, students with ESN continue to spend most of their school day in separate classes or schools (Kurth et al., 2014; Morningstar et al., 2017).

Statement of the Problem

The problem of the continued placement of students with ESN in separate classes and schools is evident when one considers the amount of extant research regarding the positive effects of including students with ESN in regular classes and the adverse realities of educating students with ESN in more restrictive placements (i.e., separate classes and schools; Gee et al., 2020). Nevertheless, this problem persists despite enacted federal policy and expensive litigation proceedings. The mitigation of this problem of limited access to regular education classes, the general education curriculum, and non-disabled peers for students with ESN cannot occur through efforts focusing on single students, single classes, or single schools. Fullan and Knight (2011) posit that educational reform efforts fail when focused on individual teacher development or disconnected aspects of a more significant problem. According to Wehmeyer and Kurth

(2021), three generations of failed inclusive practices have mistakenly focused on individual students in classrooms, disregarding that classrooms and schools are part of a more extensive system.

Instead, the problem of limited access for students with ESN necessitates systemic change efforts at district and state levels that include a long-term commitment to sustainability (Agran et al., 2020; Sailor & Roger, 2005). As Fisher et al. (2002) state, “Thus the concern is not so much whether to provide inclusive education, but how to implement inclusive education in an effective and efficient way" (p. 74).

When a district decides to engage in inclusive systemic change, teaching will look different because educators will be using different instructional strategies, working collaboratively with multiple professionals, and working in different spaces (i.e., co-teaching classrooms, push-in rather than pull-out services) (Wehmeyer & Kurth, 2021). Teachers will need guidance and practice to apply new instructional strategies and to plan, teach, and assess in collaborative ways that maximize the expertise of each professional (Cook et al., 2021). One way to assist in effecting change on a systemic level is through coaching.

According to Fullan and Knight (2011), many efforts for educational reform fail to accomplish their goal because they do not incorporate the use of coaches in their change endeavors. Kraft et al. (2018) define a coach as a professional who observes teachers and provides feedback that will assist them in improving their educational practices. However, Fullan and Knight (2011) expound on the role of a coach, stating that "reform drivers of capacity building, teamwork, pedagogy, and systemic reform are compatible with the strategies of good coaches" (p. 1). This later description exemplifies the more considerable role coaches might play in systemic change endeavors. According to Croft et al. (2010), systems that support and

implement high-quality, successful coaching initiatives and programs do so through collaborative efforts at the state, district, and school levels.

Purpose of the Study

The purpose of this study is to begin to understand the role of a district inclusive education coach in an ongoing, successful district-wide systems change endeavor that is designed to (a) move students with ESN from segregated classrooms to general education classes, (b) increase the use of evidence-based practices to provide access to the general education curriculum for the students with ESN, (c) increase student academic and social engagement in the general education school contexts, and (d) improve student outcomes in the general education curriculum. The following question will guide this study:

> What is the role of a district inclusive education coach in facilitating sustainable systemic change at classroom, school, district, and state levels designed to increase the inclusion of students with extensive support needs in regular education classes?

This study focuses on the role of the inclusive education coach within one district utilizing grounded theory methodology within a single case study using an interpretive paradigm. The researcher collected and analyzed transcripts from multiple semi-structured interviews with the coach and other key stakeholders with whom the coach interacted. The researcher also collected and analyzed field notes from shadowing the coach. Finally, the researcher reviewed the tools and documents the coach used to conduct his job-related tasks.

Significance of the Study

The extant research that includes the use of coaching for systemic change in education comprises studies related to several issues within the context of educational improvements. For instance, some research examined the role of a coach in education reform efforts unrelated to

students with disabilities (Balchin et al., 2006; Castillo et al., 2016; Hashim, 2020; Lohmann et al., 2013; Nuss, 2020; Voelkel et al., 2023; Warnock et al., 2022), and other research examined systemic change efforts to include students with disabilities in regular education (Cunningham et al., 2017; Kozleski & Smith, 2009; Pearl et al., 2012; Raley et al., 2022; Ryndak et al., 2007; Sindelar et al., 2006; Welch, 2018). However, little research exists that has examined the role of an inclusive education coach in a district or state-level systemic change endeavor to include students with ESN in regular education classes (Bennett et al., 2021; Israel et al., 2022; Lane et al., 2023; Ryndak et al., 2007; Strieker et al., 2012). Only three of these five studies involved using coaches employed by the system to implement systemic change (Bennett et al., 2021; Israel et al., 2022; Ryndak et al., 2007). Additionally, none of these studies employed the use of grounded theory methods to study this topic.

The theory conceptualized based on the findings from this study has the potential to make important contributions to states and districts that wish to pursue similar systemic change endeavors to include students with ESN in regular classrooms. According to Albers et al. (2020), research is needed about the role of an implementation support practitioner (i.e., coach) as a profession to understand how they "enable the uptake and integration of evidence in real-world settings" (p. 7). The multiple days shadowing the district inclusive education coach completed during this study allowed the researcher to examine what the coach said, did, and accomplished; and allowed the researcher to observe and understand the responses of the coach's colleagues (Albers et al., 2020). These shadowing days, along with interviews and the review of documents, can potentially fill a gap in the extant research.

CHAPTER II: LITERATURE REVIEW

History of Education for Students with Intellectual Disabilities 1700-Present

The changes in the care, education, treatment, or training of people with disabilities throughout history often reflect society's attitudes (Spaulding & Pratt, 2015). As a young nation in the late 1700s, Americans believed that all beings were created equal. This belief inspired the political and social contexts of the time and influenced "educational philosophies and practices" (Crissey, 1975, p. 800). The idea of self-government stirred the belief in education for all and society's responsibility in providing it. These beliefs led to education for those who were deaf and blind and, later, those with intellectual disabilities (Crissey, 1975; Spaulding & Pratt, 2015).

Edward Seguin, considered by many in the United States as the father of special education, moved to the United States in the mid-1800s (Tasse & Matthew, 2013). He had been mentored in Europe by Jean Marc-Gaspard Itard, known for his efforts to socialize Victor, the wild boy of Aveyron. Though unsuccessful, Itard's methods were expounded upon by Seguin, along with successful methods of teaching those who were deaf and blind.

At the time of Seguin's arrival in the United States, there was a sharp increase in the number of institutional facilities where people with intellectual disabilities lived in unacceptable conditions (Salend & Garrick Duhaney, 2011). In contrast, Seguin was affiliated with several institutions in multiple states (e.g., New York, Massachusetts, Pennsylvania, Ohio) meant to house small numbers of children with intellectual disabilities (Talbot, 1964). He believed in early intervention beginning in infancy (Crissey, 1975; Talbot, 1964). Seguin believed in supporting families to raise their children with intellectual disabilities in their homes and for the children to attend an institution for a short time where they were taught "useful work and vocational skills" before returning to their families and the community (Crissey, 1975, p. 802). Talbot (1964)

quotes Seguin as saying that students with intellectual disabilities are taught with methods that "start where the child is, and brings them, without gap to what is known by everyone" (p. 63). Unfortunately, Seguin's methods and goals for students with intellectual disabilities were short-lived.

By the end of the 1800s, society began to experience changes in their attitudes and beliefs toward people with intellectual disabilities, based on theories in research. These changes in society's attitudes and beliefs negatively affected the treatment and education of people with intellectual disabilities (Spaulding & Pratt, 2015). For example, Darwin's theories about inherited traits within the animal kingdom led to the belief that all human characteristics were inherited without consideration of any other factors (e.g., environmental, social, biological; Crissey, 1975). Similarly, Galton's theory of eugenics became a viable solution to solving the threat to humanity that society now believed was posed by people with intellectual disabilities (Jarrett, 2020; Spaulding & Pratt, 2015).

Several publications written in the early 1900s (e.g., *The Kallikak Family* [Goddard, 1912]) helped to drive the belief of a genetic link between intellectual disability and depravity, poverty, and a host of criminal or socially objectionable behaviors (Mutua et al., 2011). The inappropriate use of intelligence tests to target inability without consideration of social or environmental factors led to further segregation of people with intellectual disabilities (Spaulding & Pratt, 2015). As a result, institutions lost funding, became overcrowded, and were used to isolate and control individuals with intellectual disabilities rather than educate them (Spaulding & Pratt, 2015). Instead of being a pathway to education and a return to the community, institutionalization became a lifelong sentence to isolation and a lack of control of one’s life (Crissey, 1975).

Several states began passing compulsory education laws (Spaulding & Pratt, 2015). By 1918, all the states required students to attend school, but the expectation of attendance across states was not consistently applied to students with disabilities (Yell et al., 1998). Nevertheless, special classes for students with intellectual disabilities emerged within public schools, increasing rapidly until the 1960s (Crissey, 1995). As recently as 1969, however, various state courts ruled against including students with disabilities in public schools.

Throughout the next half century, multiple Supreme Court decisions and federal legislation began to bring about changes in the education of students with disabilities, including students with significant intellectual disabilities. These changes began during the civil rights movement with the 1954 Supreme Court decision in *Brown v. Board of Education*. In that class action lawsuit, the Court determined that "separate is not equal," citing the 14th Amendment of equal protection under the law. The Court further ruled that racial segregation of schools was unconstitutional because states were responsible for providing an education to all citizens in equal measure, and a “separate” education was not an “equal” education.

This ruling eventually expanded beyond race to include disabilities. Using arguments similar to those in the Brown case, parents and other advocacy groups demanded equal educational opportunities and treatment for students with disabilities (Yell & Rogers, 1998). In cases like *Pennsylvania Association for Retarded Citizens (PARC) v. Commonwealth of Pennsylvania* (1972) and *Mills v. Board of Education of the District of Columbia* (1972), parents argued that the exclusion of children with disabilities from schools was discriminatory (Wright & Wright, 2019).

In the PARC case, the District of Columbia had enacted a state law that allowed schools to exclude students with intellectual disabilities. The Court ruled that since tax dollars supported

education, the District of Columbia could not deny students with intellectual disabilities access to public education (Mutua et al., 2011) and that this free education had to be equal to that provided to all students within the education system (Yell, 2022).

In the Mills case, the District of Columbia had excluded students with disabilities from public schools through suspension and expulsion practices (Wright & Wright, 2019). The Supreme Court ruling made it explicit that students with disabilities had the right to a free and appropriate education (Yell, 2022), and schools could not use exclusionary practices (e.g., transfer, suspension) without due process of law (Wright & Wright, 2019).

Amid the civil rights movement, in 1965, the Elementary and Secondary Education Act (ESEA) became the first law for students with disabilities. Its expansion in 1966 allowed federal grant money for schools to build, expand, or improve their programs for students with disabilities (Wright & Wright, 2019).

Current Law and Litigation

In 1975, Congress passed the Education for All Handicapped Children Act (EAHCA; Public Law 94-142). In the Statement of Findings and Purpose for this act, the 94th Congress acknowledged that the educational needs of the over eight million children with disabilities across the United States were not being met, and one million of these children were excluded from the public school system and from interacting with their peers (20 U.S.C. §§ 1401 [3][b][1-4]). This federal law mandated that all children, ages 3-21, were guaranteed access to an education regardless of their disability (Mutua et al., 2011). This law also included a series of checks and balances ensuring the legal rights of students and their families (Wright & Wright, 2019).

EAHCA was amended several times, with the Individuals with Disabilities Education Improvement Act of 2004 (IDEA) being the most recent reauthorization. One of the purposes of both EAHCA and IDEA was to ensure that students with disabilities receive a free and appropriate education (FAPE), including special education and related services. One purpose of EAHCA was to advance the employment of "handicapped individuals" (20 U.S.C. §1405). IDEA further emphasized that these services must be designed to meet each student's unique learning needs and enable the student to access further education, employment, and independent living (20 U.S.C. §1400 [d][1][A]). IDEA (2004) continued to emphasize the protected rights of students and their families (20 U.S.C. §1400 [d][1][B]). It improved early intervention services for infants and toddlers (20 U.S.C. §1400 [d][1][C][2]), even though early intervention for this age group was recognized over a century prior (Chrissy, 1975; Talbot, 1964).

When a student is determined to have a disability and to need specially designed instruction, a team of education professionals, the parents, and, when appropriate, the student come together to design an individual education program (IEP). The IEP "becomes the FAPE for that student" (Yell & Katsiyannis, 2019, p. 312). The United States Supreme Court rulings in two cases have helped define FAPE. First, in the *Board of Education of the Hendrick Hudson Central School District v. Rowley* (1982) (Rowley*),* the court held that a FAPE would allow a student to benefit from individualized instruction (https://www.oyez.org/cases/1981/80-1002). This ruling led to districts providing varying degrees of benefit, from minor to significant (Yell & Katsiyannis, 2019).

Later, in *Endrew F. v. Douglas County School District RE-1* (2017) (Endrew), the court ruled that a FAPE would allow a student to make progress in light of the student's circumstances (https://www.oyex.org/cases/2016/15-827). According to Turnbull et al. (2018, p. 126), this

latter ruling aligns with IDEA in that the education of students with disabilities “can be made more effective by having high expectations” by “ensuring their access to the general education curriculum in the regular classroom, to the maximum extent possible” (20 U.S.C. § 1400[c][5][A]), and by acknowledging that “low expectations” have hindered the implementation of IDEA (20 U.S.C.§ 1400[c][4]).

One part of IDEA (2004) that has led to much controversy is the Least Restrictive Environment (LRE) concept. Federal law regulates that a continuum of alternative placements must be available for special education services and related services (*34 C.F.R. § 300.115*). EAHCA already required that students must be educated in the least restrictive environment (20 U.S.C.§ 1418[d][2][A]). It clearly stated that students with disabilities must be educated with nondisabled classmates, to the maximum extent appropriate, and that their removal from the regular education environment should occur only when the nature or severity of the child's disability "is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily" (20 U.S.C. § 1412[5][B]). IDEA (2004) further clarified that a student with a disability is expected "to be involved in and make progress in the general education curriculum…and to participate in extracurricular and other nonacademic activities" (20 U.S.C. § 1414[d][1][A][IV] [bb]). As noted in IDEA, the findings of Congress are that, according to three decades of research and experience, “access to the general education curriculum in the regular classroom, to the maximum extent possible” is a more effective way of educating children with disabilities (20 U.S.C. § 1400[c][5][A]).

Identification of Students with Extensive Support Needs and Trends in Placement Data

Taub et al. (2017) describe students with extensive support needs (ESN) as those who require ongoing support and who are often identified within the disability categories of

"significant cognitive disability, autism, developmental disabilities, or multiple disabilities" (p. 127). This population of students is least likely to receive an educational placement inside a regular education classroom (Brock, 2018; Kurth et al., 2014; Morningstar et al., 2017). Taub et al. (2017) further explain that these students might also participate in state testing based on alternate achievement standards. This section will provide data regarding including students with ESN across disability categories in regular education classes.

Researchers have examined the national trends in educational placements of students with disabilities. Williamson et al. (2020) examined national educational placements for all students with disabilities from 1990 to 2015. For students with disabilities overall, they determined an increase in regular education placements and a decrease in more restrictive placements over this period, although the trend in this progress has decelerated since 2007. However, they found a notable difference between disability categories when examining the trends in educational placement. Specifically, for students identified with a learning disability, there was a 171% increase in regular education classroom placements, in contrast with a modest 34% increase for students with an intellectual disability (Williamson et al., 2020).

Morningstar et al. (2017) compared the educational placements of students with significant disabilities (i.e., autism, intellectual disability, multiple disabilities, and deaf-blindness) to students from other disability categories from 2000 to 2014. They found that the educational placements of students without significant disabilities were consistently trending toward more time in regular education classes. While the trend in placements for students with significant disabilities also showed the same positive trend in educational placement, in 2014, more than half of the nation's students with significant disabilities were still spending most of

their school day outside regular education classes, separated from their classmates without IEPs (Morningstar et al., 2017).

These findings align with those of Brock (2018), who reported on four decades (i.e., 1990-2014) of educational placement of students with intellectual disabilities. Brock noted a steady, albeit slow, increase in the educational placement of students with intellectual disabilities in regular education classes during the late 1990s and early 2000s. However, this increasing trend gradually plateaued, with the highest percentage (17.9%) of students with intellectual disabilities educated in regular education classes in 2010 and dipping to 16.9% in 2014. Though Brock's research did not analyze the causes for the lack of continued growth, he did suggest that placement decisions are made based on reasons other than students' individual support needs, as current law mandates.

Current Identification and Placement Data for Students with Extensive Support Needs

Schalock et al. (2021) define an intellectual disability as "characterized by significant limitations both in intellectual functioning and in adaptive behavior as expressed in conceptual, social, and practical adaptive skills" (p. 13). The current 44th Annual Report to Congress on the Implementation of the Individuals with Disabilities Education Act (U.S. Department of Education, 2023) reports that only 17.9% of the nation's students identified with an intellectual disability are included in regular classes for more than 80% of the day, and 47.6% of students in this population spend less than 40% of the day inside the regular classes with same-aged classmates without IEPs.

According to IDEA (2004), multiple disabilities refer to the presence of two or more impairments that lead to severe educational needs that cannot be accommodated by instruction that focuses on only one of the impairments (34 CFR §300.8[c][7]). Only 15% of students

identified with multiple disabilities are included in regular classes for more than 80% of the day, and 43.6% of students in this population spend less than 40% of the day inside regular classes with their same-aged classmates without IEPs (U.S. Department of Education, 2023). For each of these populations, just under half continue to spend most of their day separated from non-disabled classmates.

Students with autism are typically identified along a spectrum with diverse levels of ability in communication, socialization, learning, movement, and sensory processing (Kluth et al., 2008). This diversity might explain the increased percentage of students within this population who currently are included in regular education classes. For students identified with autism, there appears to be more progress, as 40.8% of this population are included in regular classes for more than 80% of the day, and 33.1% spend less than 40% of the day inside regular classes with same-aged classmates without IEPs (U.S. Department of Education, 2023).

Finally, a developmental delay is a disability for a child between the ages of three and nine who experiences a delay in physical, cognitive, communication, social-emotional, or adaptive development and requires specially designed instruction (34 CFR §300.8[b]). Current data shows that 69.8% of students identified with a developmental delay are included in regular classes for more than 80% of the day, and 13.9 % spend less than 40% of the day inside regular classes with same-aged classmates without IEPs (U.S. Department of Education, 2023). Students only remain within this disability category until they turn nine years old, typically between second and third grades, when they would become eligible under a different category. The young age of this population might explain the higher numbers of students currently included in regular education classes.

Some researchers believe that regular education classes should not automatically be considered the educational placement for students with ESN (i.e., intellectual disabilities, multiple disabilities, autism) (e.g., Kauffman et al., 2020), while others contend that regular education classes should be the default placement (e.g., Brock 2018). In 1975, EHCA mandated that special services for students with disabilities must enable them to participate in regular education classes "to the maximum extent practicable" (20 U.S.C. §1414 [a][1][C][iv]). IDEA (2004) further mandates that the removal from placement in regular classes should occur only if the use of supports and services in regular education classes has proven to be unsuccessful in meeting the student's learning needs. Much research examines the benefits of placement in regular education classes for students with ESN. However, no data has been found that shows better outcomes for students with ESN placed in more restrictive settings (Gee et al., 2020).

Research on the Effects of Inclusion on Students with and Without Disabilities

Mansouri et al. (2022) identified six studies that compared the academic and social outcomes of students with ESN taught in regular education classes with those taught in segregated settings. Five studies found that students with ESN educated in regular education classes had better social outcomes than those educated in segregated classes (Mansouri et al., 2022). These outcomes included more extensive friendship networks, higher levels of social contact with non-disabled peers, and more interactions initiated and reciprocated (Mansouri et al., 2022). Gee et al. (2020) noted more engagement in peer-to-peer learning and increased progress in communication skills on IEP goals for students educated in regular classes, while students in separate classroom placements made only minimal progress.

In a recent study, Jameson et al. (2022) found that students with ESN educated in regular classes had 50% more social interactions than those educated in more segregated contexts.

Additionally, Brock (2018) states that, for this population, regular education classes are the most advantageous context for practicing social and academic skills.

When comparing academic outcomes, Mansouri et al. (2022) identified two of the six studies that found students with ESN educated in regular education classes scored higher in reading, writing, and math. Westling (2019) found that there was a positive relationship between the inclusion of students with disabilities in regular classes and the academic outcomes for both students with disabilities and their classmates without IEPs, based on NAEP reading and math scores. Additionally, Gee et al. (2020) specifically found that the students with ESN educated in regular classes were engaged in academic instruction for more extended periods of time when compared to similar students in segregated contexts.

This lack of academic engagement in more restrictive contexts was reported more recently in two additional studies (Jackson et al., 2022; Zagona et al., 2022). Zagona and her colleagues found that students with ESN educated in separate schools were five times less likely to provide an academic response when compared to the students educated in regular education classes (Zagona et al., 2022). Distraction levels (i.e., occurrences of distraction to the student with ESN by peers, adults, or objects) were higher in more restrictive contexts than in regular education classes (Towes et al., 2020; Zagona et al., 2022). Also, students with ESN exhibited lower levels of distracting behaviors when educated in regular classes than those educated in more restrictive placements (Towes et al., 2020).

Instruction and materials also have been found to differ between the two educational contexts. Jackson et al. (2022) found that students educated in the most restrictive placements did not have access to general education grade-level materials or content, even with modifications. These students were more likely to be provided with materials designed for much younger

students, or even preschool materials, regardless of the student's age (Jackson et al., 2022). Ruppar et al. (2018) found that students with ESN were ten times more likely to access academic literature and almost three times more likely to be exposed to various literary forms in regular education classes than students in more restrictive contexts. Teachers in more restrictive contexts also were less likely to be observed providing instruction (Zagona et al., 2022). Finally, instruction in restrictive contexts was more teacher-centered, while it was more student-centered (e.g., work, partner, or group choices) in regular education contexts (Jackson et al., 2022). These findings might explain the lack of evidence in support of more segregated settings.

Kart and Kart (2021) identified studies from several countries that measured the social and academic outcomes of non-disabled students taught in inclusive settings. They found 13 studies that showed positive social outcomes for non-disabled students educated in regular education classes. These included reduced fears and biases toward, higher rates of friendships with, and increased acceptance and understanding of both students with disabilities and other individual differences. Only one study showed a decreased acceptance toward students with physical impairments. These findings align with the contact theory developed by Allport (1954), which suggests that prejudices could decrease with “equal status contact between minority and majority groups in the pursuit of common goals” (p. 281), for example, between students with disabilities and their classmates without IEPs in their acquisition of grade level content.

When considering the effects of inclusion on the academic outcomes of non-disabled students in regular education classes, Kart and Kart (2021) found differences between elementary and secondary grade levels. The effects were primarily positive at the elementary level, with some neutral effects. At the secondary level, however, the effects were primarily neutral, with some negative effects. While Kart and Kart considered the adverse effects minor,

they determined that school-based factors (e.g., lack of teacher and administrator professional development) had more influence on student outcomes at the secondary level than at the elementary level. This finding further aligns with Allport's theory that when an institution (e.g., a school or school district) actively supports contact between minority and majority groups through relevant professional development and practices, there is a further reduction in biases, and the two groups can discover commonalities (Allport, 1954).

Given the research findings regarding the positive outcomes for students with ESN educated in regular classes, and the neutral or positive effects of inclusion on classmates without IEPs, it is difficult to understand why so many students with ESN continue to be educated outside of regular classes for the majority of their school day. In the following section, some possible factors are discussed.

Possible Factors Impacting the Limited Inclusion of Students with Extensive Support Needs

Agran et al. (2020) identified six possible factors students with ESN experience continued placements in the most restrictive classrooms, which they posit have more to do with school-based and sociocultural factors than students' academic and social needs (Agran et al., 2020). The six possible factors are: (a) perceptions of competence and resulting placement policies, (b) economic and demographic stratification, (c) biases, (d) teacher preparation and experience, (e) lack of resources and capacity, and (f) absence of knowledge of current research (Agran et al., 2020, p. 6). In the next section, these six factors are discussed further.

First, as previously stated, IDEA acknowledges the need for professionals to have high expectations for students with disabilities, and the lack of presumed competence has hindered the implementation of IDEA in the public school system for these students (20 U.S.C. §1400[c][4]).

Vandercook et al. (2020) further explain that district beliefs of low competence have led to placement decisions and practices focusing more on caretaking and protecting rather than teaching. This emphasis on caretaking might even lead to the assumption that academic instruction does not benefit this population (Roberts et al., 2018). Gee (2020) suggests that districts are under the misconception that students who take the alternate assessment (i.e., students with ESN) do not need access to the general education curriculum. As a result, students who take the alternate assessment remain in segregated classrooms where they often are taught a different curriculum (Jackson et al., 2022; Vandercook et al., 2020).

Second, economic and demographic stratification in education is the grouping or categorizing of students based on factors such as socioeconomic status, race, or home address. White et al. (2019) examined how the redlining mechanisms of the 1930s continue to segregate families of color within communities and that patterns in the educational placement of students mirrored these historic neighborhood segregation patterns. As early as 1968, disproportionality (i.e., the over-representation of students of color in specific disability categories) became evident within schools (Skiba et al., 2008). Data from the U.S. Department of Education (2022) indicate that Black or African American students aged five through 21 are more than twice as likely to receive special education services under the category of intellectual disability than all other racial/ethnic groups combined (p. 51). Additionally, students of color are more likely to be educated in more restrictive settings than their White counterparts with the same disabilities (Artiles et al., 2010; Skiba et al., 2008).

Third, biases against and stereotyping of students with ESN become evident when schools pre-determine placement based on the student's category of disability rather than the student's needs (Turnbull & Turnbull, 2020). Schools and districts act on these biases when they

place students in separate classrooms based on disability or perceived competence (Gee, 2020). Furthermore, this continued segregation perpetuates fears and biases against people with disabilities for future generations. Lansey et al. (2023) posit that the biases of educators are exacerbated by the historical segregation of students with disabilities and the general ableist philosophy of the education system. Together, these long-held perceptions of competence and biases about students with disabilities define expectations and practices within their educational contexts, the academic content they access, and the opportunities to learn, all of which they experience in school (Lansey et al., 2023).

Fourth, the literature about regular and special education teacher preparation consistently points to a lack of focus on critical essentials required for teaching students with disabilities, particularly those with ESN, in regular classes (Leko et al., 2015; Rupar et al., 2016; Zagona et al., 2017). For example, teacher preparation programs often lack components for both special and regular education pre-service teachers to practice and experience collaboration or communication skills (Da Fonte & Barton-Arwood, 2017; Gee, 2020; Vandercook et al., 2020; Zagona et al., 2017), co-teach (Leko et al., 2015), provide access to the general education curriculum for students with disabilities (Leko et al., 2015), and use evidence-based strategies across multiple contexts (Gee, 2020). Additionally, special education teachers are not sufficiently prepared to provide communication instruction to students with special communication needs (Rupar et al., 2016; Walker et al., 2022), and regular education teachers are not sufficiently prepared to participate in IEP meetings (Zagona et al., 2017).

Unfortunately, there have been similar findings regarding the preparation of administrators. School administrators have been found to demonstrate a limited understanding of

instructional practices for students with ESN (Gee, 2020; Roberts et al., 2018), as well as IDEA (Turnbull & Turnbull, 2020).

There currently are limited opportunities for pre-service teachers, in-service teachers, and administrators to experience the successful inclusion of students with ESN (Gee, 2020). In a recent study, Jackson et al. (2022) found that schools rarely or never provided professional development related to students with disabilities to staff. While this lack of knowledge, practice, and understanding from pre-service programs contributes to the continued placement of students with ESN in segregated classrooms and schools, the lack of in-service professional development and experiences related to students with ESN perpetuates the lack of inclusion of this population into regular classes, too.

Fifth, change is complex, and it takes time. The lack of resources and capacity for including students with ESN in regular classes is often due to inadequate scheduling for co-planning between general and special educators. Appropriate materials required for students with ESN to participate in the general education curriculum also might be unavailable (Agran et al., 2020). Districts might lack the capacity to engage in large-scale efforts to update their current skills (Gee, 2020), practices (Vandercook et al., 2020), and policies (Turnbull & Turnbull, 2020). With this lack of resources and capacity, maintaining the status quo might be considered the easier option, regardless of the current research and mandates found in IDEA.

When considering financial resources, Westling (2019) determined that the degree of inclusion of students with disabilities in regular education classes within a state was unrelated to per-pupil expenditure or a state's median family income. In fact, Jackson et al. (2022) found that more money was spent per student with disabilities when students were placed in more restrictive placements.

Finally, teachers and administrators often lack knowledge of the current research about inclusion and the practices that allow students with disabilities to access the general education curriculum successfully (Agran et al., 2020). According to Turnbull and Turnbull (2020), when schools face due process, staff frequently cannot cite any research to support the practices they provide to students before placing them in segregated settings. Furthermore, when teachers are not knowledgeable about effective research-based practices such as embedded instruction (Jimenez & Kamei, 2015), Universal Design for Learning (CAST, 2018), high-leverage practices (McLeskey et al., 2017; Pennington et al., 2023), or peer supports (Brock & Huber, 2017), they might attribute an unsuccessful inclusion experience to the student rather than their insufficient instructional practices (Agran et al., 2020). The lack of knowledge of current research-based practices contrasts with IDEA, which references research- or scientifically-based interventions 76 times (Turnbull & Turnbull, 2020).

Sustainable Systemic Change

The amelioration of issues related to the educational placement of students with ESN cannot occur through the efforts of a single student, parent, teacher, administrator, or school. Rather, it requires sustainable systemic change efforts simultaneously implemented at the state, district, school, and classroom levels (Burnette, 2022). Systemic change requires knowledge of evidence-based practices (i.e., skills, techniques, and instructional strategies) used by a practitioner (Fixsen et al., 2005) and evidence-based methods for implementing these practices to bring about systemic changes in policies and practices (Fixsen et al., 2013). For these efforts to be successful, they must include a shared vision among all stakeholders, clear definitions of the desired changes that are measurable, the commitment or buy-in of all stakeholders to the

changes, and the development of team structures to aid communication and accountability between and among levels of stakeholders (Agran et al., 2020).

To make purposeful changes within any complex system, it is necessary to de-silo the current structures within the system to align their functions and goals (Fixsen et al., 2013). Within the complex education system, specifically, it is necessary to de-silo the structures of general and special education. This purposeful change can occur through transformations in higher education pre-service preparation programs and also through de-siloing the general and special education administration departments at the state and district levels. De-siloed, unified education systems could support co-teaching models, shared responsibility of students, and scheduled time for planning between regular and special education teachers at the school level (Vandercook et al., 2020).

According to the National Implementation Research Network (NIRN), "implementation" is the method of "purposefully producing improvements in human services" (Fixsen & Blase, 2016, p. 1), such as education. Fixsen and his colleagues define implementation as "a specified set of activities designed to put into practice an activity or program of known dimensions (Fixsen et al., 2005, p. 5). Implementation is a process that typically occurs in four stages (Fixsen & Blase, 2016; Fixsen et al., 2013), and actively involves stakeholders in a coordinated effort at all levels of the system (Fixsen et al., 2005). The four stages of implementation include exploration, installation, initial implementation, and full implementation, although the stages are not necessarily linear (Blase et al., 2015; Fixsen & Blase, 2016). Fixsen and Blase (2016) suggest that implementing change takes two to four years. However, Zimmerman (2014) reports that implementation changes in education can take as long as seven years and possibly longer. Other

factors, such as the relative size of the district or the complexity of the systemic change endeavor might also affect the amount of time necessary to implement sustainable systemic change.

During the exploration stage, an implementation team comprises members with the expertise and knowledge to ensure the desired changes occur and are sustained (Blase et al., 2015; Fixsen et al., 2013). Teams can be formed at multiple levels of the education system (e.g., state, district, school), and communication between the teams is essential for successful implementation (Blase et al., 2015). Teams use data to find a fit between the identified needs, available resources, and evidence-based practice or program being considered (Fixsen et al., 2005). Research about the considered program is disseminated to all stakeholders, including the philosophy behind the program (Blase et al., 2015). It is during this time that the vision for change is developed.

During the installation stage, the organization of resources, protocols for communication, and data collection for teacher fidelity and student outcomes are carefully planned (Blase et al., 2015). According to Fixsen et al. (2005), the "...implementation of evidence-based practices requires behavior change at the practitioner, supervisory, and administrative support levels. Training and coaching are the principle [*sic*] ways in which behavior change is brought about…" (p. 29). Therefore, all aspects of long-term professional development and coaching must be intentionally designed and implemented with fidelity to the initial group of practitioners and made sustainable to support future staff (Blase et al., 2015).

The initial implementation stage is typically wrought with uncertainty as new practices and procedures are learned (Blase et al., 2015). This stage in the process often is when implementation fails (Fixsen et al., 2005), but it also is why careful planning at the two prior stages is so important. The changes might be associated with fears and a desire to return to the

previous way of doing things (Fixsen et al., 2005). During this stage, it is necessary to maintain and support the stakeholders who joined the effort earlier in the process while engaging new stakeholders as the change effort expands (Burnette, 2022). Maintaining the shared vision will take additional support, including coaching (Blase et al., 2015) and the ability of those working through the change effort to examine their individual biases and values (Sailor, 2017).

Full implementation occurs when the new specified set of activities has become the new norm within the system (Blase et al., 2015). Sustainability refers to the ongoing survival and effectiveness of the implementation changes (Fixsen et al., 2005). Although changes are being sustained, it is still necessary for the system to revisit the four stages of implementation to ensure changes endure within the system during any disruptions (e.g., staff and leadership changes) and in relation to other adaptive challenges that involve changing values, beliefs, and habits both within and outside the system (Blase et al., 2015; Fixsen et al., 2005). Throughout the change process, improvement cycles help to "identify and sustain what is working and raise challenges and barriers to the level that can resolve the issue" (Blase et al., 2015, p. 23).

Once an implementation practice or program is well defined (i.e., operationalized), implementation drivers support the behavior changes required to reach full implementation (Fixsen & Blase, 2016). The three implementation drivers are organizational drivers, leadership drivers, and competency drivers (Blase et al., 2015; Fixsen & Blase, 2016). Together, these drivers are fundamental to the success of systemic change efforts (Blase et al., 2015).

Organizational Drivers

Organizational drivers are people and systems that “enable the innovation to be sustained and used with fidelity” (Blase et al., 2015, p. 6). These include administration actively assisting

with and supporting the identified area of change, an operationalized process that uses data to support decision-making, and system-wide interventions (Fixsen et al., 2013).

Leadership drivers refer to leadership that provides a "persistent and integrated approach to change and performance in the system" (Fixsen et al., 2013, p. 222). With this leadership, technical and adaptive challenges are identified and addressed. Technical challenges refer to those which are "well defined and generally agreed upon" (Blase et al., 2015, p. 3) and are often addressed through administrative policy or action. Adaptive challenges can be more difficult because they refer to the beliefs, values, and feelings of the many people within the system as they respond to the change effort (Blase et al., 2015).

Competency drivers are used to "improve staff competence and confidence" (Blase et al., 2015, p. 5) and include "staff selection, training, coaching, and performance assessment (fidelity)" (Fixsen et al., 2013, p. 222). The following section explores the specific competency driver of coaching because this particular competency driver is the focus of this research.

Coaching

Joyce and Showers (2002) reported that when provided with professional development that involves standard workshop-type practices such as lectures or discussions, teachers show a slight increase in knowledge, an even slighter increase in skill, and no transfer of knowledge or skill to the classroom. Adding a demonstration component to professional development increases teachers' knowledge and skill levels but does not transfer knowledge or skill to the classroom. When professional development also includes the opportunity for practice, teachers' knowledge and skill levels increase dramatically, and some transfer of knowledge or skills to the classroom occurs; however, that transfer is minimal. However, Joyce and Showers (2002) found that with

the addition of in-classroom coaching, knowledge of the practice, skill, and consistent implementation of the practice in classrooms occurs, allowing students to benefit.

The intent of professional development is to increase a teacher's repertoire of practices and provide a more positive outcome for student learning (Joyce & Showers, 2002). Knowledge, demonstration, and practice opportunities are all essential components of successful professional development, but without coaching, transferring that knowledge and skill into classroom practice is improbable (Joyce & Showers, 1982).

Research shows that coaching supports preservice and in-service teachers' use of evidence-based practices with fidelity in general and special education classrooms (Kretlow & Bartholomew, 2010). When provided with coaching, teachers develop improved skills in using learned strategies, maintain the use of the strategies over time, generalize the strategies across learning objectives, and assist their students in understanding the purpose and expectations of the strategies (Joyce & Showers, 2002). In contrast, teachers with the same training without coaching do not develop, retain, generalize, or share a deep understanding of the strategy with their students (Joyce & Showers, 2002).

A coach can be a professional from within the system (e.g., teacher) or outside the system (e.g., university faculty) who assists others in implementing newly learned practices with sustained fidelity (Albers et al., 2020; Kretlow & Bartholomew, 2010). Fixsen et al. (2005) define a coach as one responsible for teaching and reinforcing the use of new implementation practices, as well as supporting those learning to use the practices when they are faced with potential adverse reactions on the road to mastery. Albers et al. (2020) define a coach as an "implementation support practitioner" who requires a particular set of qualities (i.e., professional background, knowledge, skills, attitudes) that promote the trusting relationships necessary for

positive implementation outcomes to occur (p. 1). Rock et al. (2011) describe how coaching can be provided in person within the classroom during live instruction or virtually through the use of technology.

There are several agreed-upon coaching behaviors in the literature. For instance, coaches observe teachers using the implementation practice within the classroom, provide feedback that allows for correction and increases the fidelity of use of the practice, and use data gathered during the observations (e.g., fidelity measures, student outcomes, other developed materials; Blase et al., 2015; Kretlow & Bartholomew, 2010; Ward et al., 2018). Other specific coaching behaviors include the use of faded prompting as a way to cue the use of the practice (Blase et al., 2015; Ward et al., 2018), the scaffolding of supports that fade over time (Ward et al., 2018), and the building of collaborative relationships based on trust and mutual respect (Albers et al., 2020; Ward et al., 2018). According to Albers et al. (2020), coaches are not responsible for direct instruction to students. However, by working closely with staff and leadership, they help promote the implementation of the new practice.

The cohesiveness and organization of the leadership around efforts to change a practice are critical to the success of the implementation practices (Joyce & Showers, 2002). When coaches demonstrate consistency, knowledge, and commitment to efforts to change a practice, teachers build trust in them (Albers et al., 2020). This trust grows when coaches communicate non-judgmentally, engage in problem-solving activities, and include teachers in shared decision-making (Ward et al., 2018). When key stakeholders in the system (e.g., administrators) engage in collaborative communication with coaches and demonstrate a commitment to efforts to change a practice, trust is maximized. It reinforces an effort to change practices (Albers et al., 2020) and helps to “challenge deeply held beliefs and practices” (Blase et al., 2015, p. 26).

Finally, research shows that coaches themselves require training and continued support. For coaches to develop and maintain skills or make necessary changes in their practices, they require fidelity checks and regular feedback from teachers and administrators (Blase et al., 2015) and also from other coaches (The University of Florida Lastinger Center for Learning, Learning Forward, & Public Impact (2016).

Coaching and Systemic Change Literature Search

A literature search was conducted using the advanced search option of eight databases, with combinations of the key terms "inclusion coach" OR "instructional coach," "special education" OR "education," "systemic change" OR "implementation science," and NOT sports. After reviewing titles, abstracts, and full texts, 18 studies from peer-reviewed journals were considered relevant to this study and included for review. To be included, the studies had to report on using coaching in a systemic change effort in K-12 education.

The following sections provide a brief overview of the 18 studies. Then, specific information is provided about the difference between internal and external coaches, professional development provided to coaches, coaches' responsibilities, successful outcomes of systemic change with coaching, barriers to success, and the descriptors used for students with disabilities. Finally, an analysis of how this study will differ from the extant literature will be provided.

Literature Overview

The studies in this review were published between 2006 and 2023 and included 11 studies that focused on including students with disabilities in regular classes, including one literature review. The other seven of the 18 studies focused on other systemic change efforts such as increasing the use of evidence-based practices (e.g., UDL, RtI), improving some aspect of the school context (e.g., playground time, technology), or understanding the perceptions of teachers

and staff about the coaching provided for them. These seven did not include a focus on the inclusion of students with disabilities.

The organizational level of systemic change achieved during efforts to change practices ranged from a single school to multiple schools. All studies used single or multiple case study methodologies except for one literature review. Ten of the 18 studies used qualitative methods to analyze the data. Of the remaining eight studies, five used quantitative analysis methods, three used qualitative and quantitative methods, but only one of the three identified using mixed methods.

Internal and External Coaches

Within the reviewed studies, coaches were either internal (i.e., employees within the system) or external (i.e., part of a university team or technical assistance center). In some studies, internal coaches were hired specifically for the systemic change effort because they possessed prerequisite skills (e.g., coaching experience). In other studies, they were already employed by the system and were considered to have expertise in at least one of the areas of desired change (e.g., RtI, use of technology) or shared the district's vision for change. One study used the term 'internal' for coaches who worked full-time within a school engaged in the study and the term 'external' for coaches who were employees of the system but did not work in the school engaged in the study; rather, they were system employees that provided support to that school (Lohrmann et al., 2013).

Only internal coaches were used in one of the 11 studies that focused on including students with disabilities in regular classes (Bennett et al., 2021), two used both internal and external coaches (Israel et al., 2022; Ryndak et al., 2007), and the other eight used only external

coaches. In contrast, six of the seven studies that focused on systemic changes without considering inclusion utilized internal coaches, and only one used external coaches.

Professional Development: External or Internal Coaches

In 11 of the reviewed studies, university faculty, researchers, or technical assistance providers acted as coaches (i.e., external coaches) and provided professional development directly to the individuals who were responsible for implementing the change initiative within the system (e.g., general education teachers, special education teachers, other coaches). Four of these studies included the development of leadership teams that comprised a variety of stakeholders who also received coaching from these external providers to develop, implement, and/or evaluate the change effort while providing the ongoing support and resources needed for building capacity and sustainability. In two of these studies, the external coaches developed teams at the school level (Pearl et al., 2012; Strieker et al., 2012). In one study, they developed a district level team (Welch, 2018). In another study, they developed teams at both the district and school levels with opportunities for collaboration between the two (Ryndak et al., 2007). The interventions provided by external providers typically lasted from one to six years. However, in their review of 12 studies, Raley et al. (2022) described one study (in which the intervention lasted only three weeks. In addition, only one of the studies reviewed for the current research used both internal and external coaches and described the external coach's role as providing professional development for the internal coaches (Israel, 2022).

In contrast, the internal coaches across all the reviewed studies received professional development in the early implementation stage of the change process. The content of that professional development varied, depending on the focus of the desired change in practice (e.g., instruction of English language learners, Universal Design for Learning).

Initial professional development for coaches ranged from several hours to five days. Specific state departments of education, project staff from universities or technical assistance centers, or district administrator teams provided the professional development for coaches. Six of the studies described ongoing professional development opportunities for the coaches. These opportunities occurred as frequently as once per week or twice per year. Three studies described scheduled opportunities for the coaches to share their experiences and support one another.

Coach Responsibilities

The responsibilities of coaches in all the studies aligned with those found in the extant literature. For instance, the coaches were responsible for building capacity within the system, communicating among and between levels of the education system, building relationships, providing emotional support, and problem-solving. Coaches were responsible for providing professional development to education team members by sharing knowledge and modeling or demonstrating practices. They planned time for observation with time for debriefing with feedback and assisted with developing action plans with teachers. Several authors, however, described how coaches worked directly with administrators. Contrary to Albers et al. (2020), one author described how the coach co-planned and co-taught alongside teachers within the classroom, providing direct instruction to students as part of their coaching responsibilities (Israel et al., 2021).

Successful Outcomes of Systemic Change with Coaching

Overall, coaching positively affected systemic change efforts across all reviewed studies. There were differences in the extent of the change efforts that were most often due to barriers, which are discussed in the next section. In two studies (Ryndak et al., 2007; Sindelar et al., 2006), the researchers described positive outcomes of the systemic change efforts related to

inclusive education for students with disabilities. Sindelar et al. (2006) reported a lack of sustainability in the years following the efforts. However, Ryndak et al. (2007) reported a continued decrease in the number of students with disabilities attending separate schools and upward trends in school and district performance grades two years after the five-year study ended.

Most of the researchers described positive changes in increased knowledge of the targeted instructional practices and the ability and/or willingness to use those practices. Specific practices addressed in the studies included differentiating instruction, using a variety of student groupings (e.g., small group, flexible), and using various co-teaching methods. The researchers also described positive outcomes in relationships. For instance, the recipients of coaching, including regular and special education teachers who traditionally worked in silos, were better able to collaborate, and relationships between coaches and teachers were built based on trust and respect, which was a cultural change within their system.

Positive changes also were noted in the mindset of practitioners, sometimes emerging as the practitioners became more reflective on their own instructional practices. Practitioners were described as developing an understanding of how an individual's beliefs and practices affect the school's culture at large. Seeing success in the classrooms due to the desired changes in practice improved teachers' confidence, promoted belief in the shared vision, and shifted the focus from student deficits to the need for school-based changes. Though discussed less frequently, other areas of improvement included using data to inform decision-making and the dedicated provision of monetary and other resources (e.g., scheduled time, materials). Additionally, the researchers who reported on systemic change endeavors to include students with disabilities or English

language learners described a positive change in attitudes and beliefs about those marginalized populations.

Barriers to Successful Systemic Change with Coaching

All the studies described barriers to successfully implementing the desired change in practice. Barriers were often described as a lack of deep knowledge about the change practice and poor communication between system levels (i.e., district, school, classroom, coaches). Cohesion was affected when information was not shared between or among system levels. A lack of consistency occurred when the expectations of key stakeholders, including coaches, were not explicit. Continuity was affected when there were interruptions due to coaches being spread too thin or a turnover of staff or coaches. When not addressed, these issues negatively affected the buy-in of teachers and administrators and hampered the success of efforts to implement the desired practice.

When efforts for change involved multiple areas of improvement (e.g., technology and literacy), positive changes occurred in the areas of a coach's expertise but less so in areas where coaches had little or no experience. The researchers cited time as a resource that was in short supply. Teachers wanted more time for observation and debriefing with coaches and more planning time to incorporate new practices in their instruction. When external coaches were used, staff expressed concern about how the changes could be sustained without the continued support of the external coaches.

In studies that focused on including students with disabilities in regular education classes, researchers noted concerns about high-stakes testing. Other barriers included difficulty changing a school's long-held cultural norms and beliefs about students with disabilities. The researchers described these issues as difficulties with de-siloing regular and special education services;

learning to collaborate, co-teach, and differentiate instruction and assessments; understanding new approaches to grading; and dealing effectively with challenging behavior. Negative beliefs about students with disabilities and their families were also a barrier identified by Lohrmann et al. (2013) in efforts to increase the use of school-wide positive behavior interventions and supports.

Descriptors of Students with Disabilities

The studies that included students with disabilities in regular education classes defined the population in various ways. Several authors examined the effectiveness or sustainability of systemic change efforts to move students with disabilities from segregated to more inclusive settings. While the implication might be that these were students with more significant disabilities, it was not always clearly articulated (e.g., Bennett et al., 2021). Ryndak et al. (2007) described the inclusion of students having significant disabilities, and Sindelar et al. (2006) described how teachers were more comfortable including students with less significant disabilities (i.e., learning disabilities) but less comfortable including students with mental or emotional disabilities.

Raley et al. (2022) noted that only five of the 12 studies in their literature review identified the disability categories of students included in regular education classes at the secondary level. In these five studies, most students were identified as having a learning disability, and identifying students with more ESN (e.g., intellectual disability) was less common. The students from Strieker et al. (2012) also were predominantly identified as having learning disabilities (n = 199), with fewer students identified as having a severe intellectual disability (n = 2). Still, other studies described their participating students as having high-

incidence disabilities (Israel et al., 2022) or mild to moderate disabilities (Cunningham et al., 2017).

Analysis and Conclusion

All 18 reviewed studies reflected the results of system change efforts that involved coaching. Of these, 11 involved including students with disabilities in regular education classes, but only four focused on incorporating coaching in systemic change endeavors to include students with disabilities in regular education classes.

Ryndak et al. (2007) focused on the sustainability of a district involved in the inclusion of students with disabilities, including students with extensive support needs, in regular education classrooms. This case study described the district's journey during its five years of involvement with external technical assistance providers, the two years after that technical assistance ended, and the coaches' roles in that journey. The district described in the study hired an internal coach during the second year of its change endeavor. The researchers used quantitative data such as the number of students educated in regular education classrooms, assessment outcomes, and state accountability reports. They also used qualitative data such as field notes of observations, meeting minutes, and interviews.

Strieker et al. (2012) analyzed the efficacy of job-embedded instruction (i.e., coaching) on teachers' ability, understanding, and willingness to use inclusive practices. This quantitative study involved six schools within a state-wide inclusive education project and six inclusion consultants (i.e., coaches). To conduct their analysis, the researchers used documents for placement and instructional delivery, observations with field notes, and field notes of meetings. Coaching was the independent variable, and the dependent variables were (a) student time in

general education classes and (b) type of instructional delivery (e.g., with or without co-teaching).

Lane et al. (2023) analyzed the perceived role of coaching and modeling of research-based instruction for special education teachers in regular education classes. The instructional strategies were designed to promote the inclusion of students with disabilities in general education instruction. The larger study involved multiple coaches, was conducted at a district level, and included four schools. However, the research study conducted by Lane et al. (2023) involved a single exemplary coach. The researchers used documents (i.e., the coach's records), an end-of-year survey, and a member check interview to analyze the effectiveness of the coach's activities.

Israel et al. (2022) analyzed how coaching influenced teacher confidence in teaching technology while incorporating UDL strategies. This research involved four coaches and was conducted in two schools participating in a district-wide Computer Science for All initiative. For this study, the researchers used online interviews, pre-and post-surveys, and a focus group that included the coaches involved in the study. Part of the analysis included teacher confidence in meeting the needs of students with disabilities in their classrooms. Israel et al. (2022) found that teacher confidence in meeting the needs of students with disabilities increased over the length of the study. Teachers were able to identify instructional strategies to support the inclusion of students with disabilities in computer science instruction (Israel et al., 2022).

Finally, Bennett et al. (2021) explored the role of inclusion coaches in a district-wide initiative to move students with disabilities from segregated to regular education classes in Ontario, Canada. This study involved 13 coaches who assisted the district in restructuring its policies and practices for educating students with disabilities. The researchers conducted

interviews with principals, teachers, and coaches; and used surveys, focus groups, and documents (i.e., journal entries) to collect data for their analysis. This study was the only one conducted outside the United States.

Of these five studies, Bennett et al. (2021) most closely aligns with the research in this proposed study. Their research revolved around the integral role of the inclusion coaches within a district involved in a systemic change endeavor to move students with disabilities into regular education classes. In this study, the researchers interviewed coaches, teachers, and principals about their perceptions of the inclusion coaches' role, including their involvement in operationalizing, facilitating, and eventually changing the district's policies and practices for educating students with disabilities. No such research was found, however, completed within the United States education system.

The researcher for this study focused on the role of a district inclusive education coach in facilitating sustainable systemic change at the classroom, school, district, and state levels within a state-wide endeavor to increase the inclusion of students with disabilities in regular education classes in a northeastern state. This change endeavor involved moving students with ESN from segregated special education classes to regular education classes. These change efforts also included targeting an:

- Increase in the practitioners' use of evidence-based practices to support access to and progress in the general education curriculum for students with ESN,
- Increase in the academic and social engagement of students with ESN in regular education classes and other regular education contexts, and
- Improvement in student outcomes.

Data collection for this single case study included multiple interviews of the district inclusive education coach, single interviews of school and district personnel, and an interview with one of the technical assistance providers involved in the initial implementation of the change endeavor.

This study included observations of the coach through shadowing experiences and field notes, which have not yet been used in studies. The inclusion of field notes added a deeper understanding of the coach's role as they performed multiple job-related tasks related to this specific systemic change endeavor. Finally, this researcher used grounded theory methodology within an interpretive framework, which had not been a methodology documented in the extant literature.

CHAPTER III: METHODOLOGY

For this study, the researcher studied and interpreted the role of one inclusive education coach as they worked with teachers, paraeducators, administrators, related services providers, and two other coaches whom they mentored within the realm of his job-related duties to educate, communicate, or evaluate the inclusion of students with extensive support needs (ESN) into regular education contexts. The purpose of this study was to begin to understand the role of the inclusive education coach working within an ongoing, successful district-wide systems change endeavor at the classroom, school, district, and state levels designed to: (a) move students with ESN from segregated self-contained classrooms and schools to regular education classes, (b) increase the use of evidence-based practices to provide access to the general education curriculum for the students with ESN, (c) increase student academic and social engagement in regular education contexts, and (d) improve student outcomes in the general education curriculum. The following question guided this study:

> What is the role of a district inclusive education coach in facilitating sustainable systemic change at classroom, school, district, and state levels designed to increase the inclusion of students with extensive support needs in regular education classes?

According to Yin (2018), a case study is an empirical method of research that deeply explores a case (e.g., the inclusive education coach) within its real-world context (i.e., the district and people with whom the coach interacts). The researcher used an interpretive paradigm to understand the coach's role at the classroom, school, district, and state levels, using a qualitative single case study to analyze the content gathered through interviews, shadowing with field notes, and documents that provided data for triangulation (Yin, 2018). The researcher used the gathered information to better understand the district inclusive education coach's role to potentially benefit

future state, district, and school initiatives related to systemic change endeavors to increase the inclusion of students with ESN within regular education contexts.

The researcher used a grounded theory method, described by Glaser and Strauss (2017) as "the discovery of a theory systematically obtained from social research" (p. 1). Specifically, the researcher used a constructivist grounded theory approach that allowed the researcher to bring their subjectivity to constructing a theory based on data (Charmaz, 2021). Merriam and Tisdell (2016) posit that one can build a grounded theory within a case study. Combining case study design and grounded theory methodology produces "a rich harvest of fine-grained research data" that provides a clear understanding of an area of research (Laws & Mcleod, 2004, p. 17).

Merriam and Tisdell (2016) define interpretivism as an epistemology that seeks to describe and understand, can be used in grounded theory, and assumes multiple context-bound realities. This case study is interpretive in that conceptual categories were developed and used to construct a theory (Laws & McLeod, 2004) based on the data collected within the bounded system of this case. Using an interpretive paradigm within grounded theory aligns the often-subjective coding procedures with constructing interpretation that leads to theory building (Urquhart, 2023).

Setting

The researcher used purposeful sampling (Merriam & Tisdell, 2016) in choosing the school district because of its specific systemic change endeavor in including students with ESN in regular education classes and its use of a district inclusive education coach to assist in the process. The researcher was aware of the district's involvement in its systemic change endeavor with TIES, the National Technical Assistance Center on Inclusive Practices and Policies (www.tiescenter.org), and the district's hiring of a district inclusive education coach as

part of their district action plan. The TIES Center worked with the school district for the first four years, and this research took place during the fifth year of the school district's systemic change endeavor. During this fifth year, the district hired two additional inclusive education coaches who were mentored by the initially-hired district coach, who is the main participant of this study. The district has continued to build capacity and has sustained the systemic changes they have accomplished over the past five years.

The setting for this study was one suburban school district in a Mid-Atlantic state comprising 44 schools spanning from pre-k to 12th grade with a student population of just over 25,000 (National Center for Education Statistics [NCES]; 2022a). According to demographic and geographic estimates, 6.9% of the students enrolled in the school district have an identified disability, and 4.5% of families live below the poverty level (NCES, 2022b). The district population is 88% White, 4% Black, 2% Hispanic or Latino, and 2% belong to two or more races (NCES, 2022b).

Participants

The researcher used purposeful sampling when choosing the district inclusive education coach because of his work within the identified school district involved in this specific systemic change endeavor. The male coach lived within the state and previously worked as a speech and language pathologist within a different school district. The district hired the coach in the second year of its systemic change endeavor as part of its long-term action plan.

To identify other participants in this study, the researcher used a combination of purposeful sampling based on her experiences shadowing the coach and initial interviews and convenience sampling based on the accessibility of potential participants (Urquhart, 2023). The use of theoretical sampling, which uses data analysis to determine additional data sources to

provide depth or scope to an emerging theory, is difficult with a single case study (Urquhart, 2023). Rather, as suggested by Urquart, this researcher used two "light forms" of theoretical sampling: completing the data collection in more than one phase, and adjusting the questions used in later interviews based on emerging codes from previous interviews (Urquhart, 2023, p.159). For example, as the researcher coded the data, categories were explored, and additional data were collected in the form of interview questions of additional participants to further develop those categories and the relationships among them (Charmaz, 2021).

The researcher met a variety of individuals (e.g., special education teachers, regular education teachers, paraeducators, school and district administrators, and related services providers) with whom the district inclusive education coach interacted during the shadowing experiences. When, based on the shadowing experiences, the researcher believed an individual might add to the construction of the theory about his role as the district inclusive education coach, she asked if those individuals were willing to participate in an interview. If an individual was willing, the researcher asked for their email address and sent them a pre-written introduction and consent form. The researcher asked them to sign the form electronically and return it to the researcher. If the individual declined or did not respond to the email after two attempts, no further contact occurred. When the researcher considered other individuals referenced by participants during interviews, the researcher procured an email address for that individual and followed the same procedure as that used to contact individuals following shadowing experiences.

In total, there were nine participants interviewed for this case study. These participants included the initially hired district inclusive education coach, two coaches who were hired by the district in its fifth year of systemic change efforts and who were mentored by the district

inclusive education coach, two district-level personnel, one special education teacher, one general education teacher, and one related services provider (i.e., a speech/language pathologist). In addition, one technical assistance provider from the TIES Center, who worked closely with the district and the inclusive education coach, was also interviewed. Despite multiple attempts, the researcher could not procure a school administrator or a paraeducator to participate in the study. See Table 1 for additional information about each participant. Information about each participant's level of education, additional certifications, years of experience in education, and prior experiences with inclusion were obtained through the interviews and based on what the participants shared when asked to tell the researcher about their background (e.g., level of education, previous roles).

Table 1. Participants

Participant	Gender	Highest level of education	Additional certification	Years in education	Inclusion experience	Number of interviews
Inclusive Education Coach	Male	Masters	Yes	20+	Yes	3
Coach A	Female	Masters	Yes	10-20	Yes	1
Coach B	Female	Masters	Yes	10-20	Yes	1
General Education Teacher	Female	Bachelors	Yes	20+	No	
Special Education Teacher	Female	Masters	Yes	20+	No	1
Related Services Provider	Female	Masters	No	5-10	No	1
District Special Education Director	Female	Masters	Yes	20+	Yes	1
District Special Education Supervisor	Female	Masters	Yes	10-20	No	1
TIES Center Technical Assistance Provider	Female	PhD	No	20+	Yes	1

Data Collection Methods

Using grounded theory methods within a case study design, the researcher built theory through data collected from interviews, shadowing with field notes, and documents (Urquhart, 2023; Yin, 2018). The following section defines these three data collection methods.

The interview is "one of the most important sources of case study evidence" (Yin, 2018, p. 118) and is a central source of data collection in grounded theory (Charmaz, 2021). The researcher used primarily semi-structured interviews. This data collection method aligns well with the interpretive paradigm in that interviews allow the space for each participant to respond from their individual experiences and for the interviewer to respond to emerging ideas (Merriam & Tisdell, 2016). Participants were encouraged to respond through opportunities to elaborate, provide examples, or tell stories from their unique perspectives (Charmaz, 2021).

Shadowing is a research method used in qualitative research that involves "a researcher closely following a member of an organization over an extended period of time" (McDonald, 2005, p. 456). For this study, shadowing allowed the researcher to investigate the role of the district inclusive education coach over multiple days while he was engaged in his daily activities. These extended observations across various settings, activities, and participants provided a deep first-hand experience of the coach's role (Merriam & Tisdell, 2016). The intent was to see the environment from the perspective of the person being shadowed (McDonald, 2005). Field notes are a written reconstruction of data (Montgomery & Bailey, 2007). During and after shadowing the district inclusive education coach, the researcher wrote field notes to describe the environments in which the coach worked, the activities and communications in which he participated with others, and impressions of what occurred during shadowing (Montgomery & Bailey, 2007).

Documents can be "written, visual, digital, and physical material relevant to the study" (Merriam & Tisdell, 2016, p. 162). They typically are used in case study research to "corroborate and augment" other data sources (Yin, 2018, p. 115). They are "not created as a result of the study" (Yin, 2018, p. 114); rather, they existed prior to the study's initiation (Merriam & Tisdell,

2016). This case study primarily used qualitative data from interviews and shadowing with field notes. However, the researcher also used quantitative data from documentation used by the coach to assess the progress of student membership, participation, and learning. Following is a description of each data collection method.

Interviews

Data from interviews were collected in multiple phases throughout the study. The researcher conducted three semi-structured interviews (Merriam & Tisdell, 2016) with the district inclusive education coach, with the first lasting 90 minutes, the second lasting 43 minutes, and the final interview lasting 59 minutes. Additionally, single semi-structured interviews of several adults with whom the district coach interacted during their job-related duties were also conducted. These adults included two additional coaches hired by the district as part of their action plan, two district personnel, a general education teacher, a special education teacher, and a speech/language pathologist. In addition, a single semi-structured interview was also conducted with one technical assistance provider from the TIES Center, who initially supported the district in its systemic change and worked directly with the inclusive education coach during the first three years of the district's systemic change endeavor. Through these interviews, the researcher:

- collected demographic information about the district inclusive education coach and the eight identified adults who work or have worked closely with the coach;
- collected information about the coach's role as it pertains to his experiences working with school and district personnel within the contexts of the educational system; and
- collected information about the coach's role from the perspective of the adults who have been coached, observed, or evaluated by the coach or communicated with the coach at the classroom, school, district, and/or state level.

The researcher conducted interviews of additional participants in two separate phases following the two shadowing cycles of the district inclusive education coach. All interviews were

conducted via Zoom after each participant electronically signed an adult consent form. The interviews lasted between 39 and 84 minutes with an average of 61.5 minutes and were video recorded with a transcript automatically developed through Zoom. The videos assisted the researcher in making necessary edits to the transcript before sending it electronically to the interview participant for member-checking. Participants were allowed to clarify any part of the transcript or delete any part they were uncomfortable sharing. The researcher included notes about the participants' body language, facial expressions, and other non-verbal responses within the interview transcript if the participant had their camera on during the interview. The researcher deleted the corresponding video once each participant completed the member check.

In addition to the three planned semi-structured interviews with the inclusive education coach, the researcher conducted informal interviews with the coach during the shadowing experiences. These interviews consisted of clarifying questions during each shadowing experience when the district coach was not interacting with other colleagues. The researcher used unstructured, open-ended questions during these informal interviews (Merriam & Tisdell, 2016).

Appendix A contains a copy of the initial interview protocols for the district inclusive education coach, and Appendix B contains a copy of the initial interview protocols for other participants. Throughout the interview process, the researcher edited each of these initial interview protocols based on emerging codes (Urquhart, 2003) to further develop the code categories and relationships among them (Charmaz, 2021).

Shadowing with Field Notes

The researcher shadowed the coach for three days on the second and fourth week of one month late in the spring semester, observing him within the natural environments that comprise his regular working contexts and during his regular working hours (Merriam & Tisdell, 2016).

During these shadowing experiences, the researcher acted as a passive observer (Yin, 2018) and shadowed the coach while he conducted his usual daily activities, interacted with others, and completed work tasks.

Field notes were written both during and immediately after each shadowing experience. The field notes provided descriptions of the various settings in which the coach moved, the adults with whom he interacted, and the types of activities, interactions, and communications he had with his colleagues (Merriam & Tisdell, 2016). The data collected during shadowing experiences were used to guide changes in questions on the interview protocols for subsequent interviews along with emerging codes (Urquhart, 2023). Data from the shadowing experiences were combined with the interview data to build theory (Urquhart, 2023), as the shadowing data complemented the interview data (Yin, 2018). Analytical ideas began to emerge through the coding and constant comparison of interview and field note data, and the saturation of concepts became evident across the two data types. These concepts were then built upon through the data found in the documents.

Documents

The researcher gathered multiple types of documents to collect further data. First, the researcher collected educational tools the district inclusive education coach used when providing professional development to adults at the state, district, school, or classroom level; these included professional development presentations and printed and web-based resources. The researcher also collected resources the district coach used to coach and assess the impact of his coaching. These included observation notes; observation checklists; measurements on key indicators of individual student membership, participation, and learning; and notes from collaborative education team meetings. Additionally, the researcher reviewed email messages and notes

collected by the coach as proof of collaboration between the coach and the district, as well as between the coach and stakeholders at the school level.

Second, the researcher collected documents related to the systemic change endeavor of the state, district, and schools. These documents included the action plan developed by one of the schools where the coach worked and several education team action plans for those working with the targeted students. The researcher also collected data from state- and district-level meetings such as agendas, professional development presentations, and action plan reviews.

Finally, the researcher collected redacted student work samples from elementary and middle school students in language arts, science, and social studies. The researcher also previewed and documented in photographs examples of modified assignments across sixth, seventh, and eighth grades for science, social studies, and health. These represented examples of outcomes of the professional education received from the coach.

Data Analysis

Coding in grounded theory traditionally occurs in three stages (i.e., open coding, selective coding, theoretical coding). When using grounded theory, coding procedures begin with the first pieces of data because the data are used for the theoretical sampling to build the support for concepts and to "follow an emerging storyline suggested by the data" (Urquhart, 2023, p. 8). The following section describes how the researcher used the three stages of coding to analyze the data collected for this study to build a theory about the role of a district inclusive education coach involved in a district-wide systemic change endeavor to include students with ESN in regular education classes.

For each interview transcript, the researcher began with *open coding.* During this stage, the researcher reviewed the data line by line and provided a code or concept for each line of data.

However, if a line of data was considered irrelevant, that line was not coded. When used, in-vivo codes (i.e., interviewees' own words) were either taken apart and analyzed in the coding process (Charmaz, 2021); combined with other codes (e.g., gerunds to preserve a sense of action) (Charmaz, 2021; Urquhart, 2023); or coded as other concepts or ideas. During the second coding stage, the researcher grouped the codes into categories in a *selective coding* process. The researcher considered only the more significant or saturated categories to formulate a theory during this stage. Finally, during the third coding stage, the researcher considered how the key categories related to one another. This stage is known as *theoretical coding*.

At each coding phase, the researcher engaged in the process of constant comparison where each new piece of data was compared to existing data to determine if identified concepts were repeated; if new concepts should be added to existing categories; or if new concepts, categories, or relationships emerged (Charmaz, 2021; Urquhart, 2023). The same three-phase coding procedure was used to analyze the field notes from the shadowing experiences. Constant comparisons were made between the data from field notes and interview transcripts.

Theoretical memo-writing is a narrative form of analysis that allows the researcher to "explore ideas, hunches, and questions about your data, codes, and comparisons" (Charmaz, 2021, p. 171). In grounded theory, part of the coding process involves using theoretical memos to document the researcher's thought process (Montgomery & Baily, 2007). Theoretical memos were used when analyzing all data collected for the study (i.e., interview transcripts, field notes, and documents) and within the coding process (i.e., open, selected, and theoretical coding).

The documents collected were used to "corroborate and augment" other data sources (Yin, 2018, p. 115). Once the researcher completed the study, the specific documents and analyses became more evident. For example, the constructed theory about the role of a district

inclusive education coach describes a recurrent process, and the documents helped to expand upon the tools, strategies, and other resources the coach repeatedly used during that process.

Finally, a second researcher also analyzed data during open and selected coding phases. Urquhart (2023) posits that when using grounded theory, verification of coding is not required. However, it is helpful to substantiate how the coding process was executed as part of the chain of evidence (i.e., providing evidence of the saturation of each category used in the construction of theory) (Urquhart, 2023). Additionally, both researchers discussed the developing theory throughout the coding process. The second researcher's role was exclusively focused on the task of coding the data, and discussing the developing theory as it emerged from the data.

Both researchers simultaneously coded 25% of the interview transcripts during both open and selective coding processes. The two researchers then discussed the codes for each line per transcript until agreement was reached. During the constant comparison of data, they eliminated codes that did not directly apply to the coach's role. For example, codes addressing district decisions or incentives provided information about the contexts in which the coach worked, but were not directly related to his role.

Codes also were eliminated if they were not evidenced across data sources. For example, Table 2 provides an initial list of nine open codes representing the tools used by the coach. Of these nine codes, two were eliminated at this stage. First, the Vocabulary Tool was developed by staff working with the coach. It was eliminated from consideration in this study because it was not referenced in the field notes, nor did multiple participants mention it. Also, it was not a tool used directly by the coach. Second, the Scaling Up Manual was a document developed by the coach and used to mentor the other coaches, but it was not referenced in the field notes and was referenced only by a small number of participants; thus, it also was eliminated from

consideration in this study. The other seven tools remained part of the selective code "Using Tools" because the coach used them within his role and represented by multiple participants and within the field notes.

Table 2. Example of Elimination of Codes for Using Tools

Open Codes	Percent of Interviews (n = 11)	Percent of Field Notes (n = 6)	Included or Excluded
5-15-45	45.5	33.3	Included
10 Reasons Why	90.9	33.3	Included
Classroom Snapshot	45.5	50	Included
Communication Passports	45.5	33.3	Included
MPL	81.8	83.3	Included
RISE	63.6	33.3	Included
Scaling Up Manual	**27.3**	**0**	**Excluded**
Transition Summary	45.5	83.3	Included
Vocabulary Tool	**9**	**0**	**Excluded**

The researchers also discussed and made decisions about grouping codes. For example, the open codes for "Tweaking Presentations" and "Evaluating Presentations" were merged within the selective code for "Providing Resources and Professional Development" because evaluation and tweaking presentations are part of the process of providing professional

development. In all, 1,593 quotes from the interviews and 221 quotes from the field notes were analyzed using Atlas.ti 23 for Windows. There was an initial count of 118 open codes. Of these 118, 11 represented demographic information about the coach and other participants in the study and were not used in developing the theory. After completing the analysis of all interview transcripts and field notes, there were 96 open codes representing 14 selective codes. Of these 14, eight selective codes were considered relevant and saturated for the theory development and comprised 1,062 coded quotations. A further discussion of the selected codes and themes is written in Chapter IV.

Trustworthiness

Glaser and Strauss (2017) argue that the "cannons of rigor" (e.g., validity, reliability) applied to quantitative research do not apply to grounded theory (p. 224). Rather, they posit that the issue of credibility is judged by the "strategies used for collecting, coding, analyzing, and presenting data when generating theory, and on how people read the theory" (Glaser & Strauss, 2017, p. 224). Nevertheless, in the following section, the researcher describes how the trustworthiness of this study was addressed.

A study's trustworthiness depends on the rigor with which the research was completed (Merriam & Tisdell, 2016). The chain of evidence used for constructing the theory helps to build trustworthiness because only saturated categories are included in the theory (Urquhart, 2023). In grounded theory methodology, the use of theoretical sampling, or light theoretical sampling, that leads to the saturation of concepts (i.e., no new aspects of a concept found in the data) builds the trustworthiness of the research (Charmaz & Thornberg, 2021). For this study, only categories that were evidenced across data sources (i.e., interviews, field notes, and documents) were used in developing the theory of the role of the district inclusive education coach.

Credibility or internal validity is described by Merriam and Tisdell (2016) as the extent to which the research findings match reality. Triangulation is "a principal strategy to ensure validity and reliability" (Merriam & Tisdell, 2016, p. 246). Triangulation refers to using multiple data sources to verify the research findings (Weaver-Hightower, 2019). In this study, using multiple data collection methods (i.e., interviews, shadowing with field notes, and documents) allowed for comparing and cross-checking the data to ensure the validity or credibility of the research (Merriam & Tisdell, 2016). For this study, the researcher ensured that interview information was supported by the field notes developed from the shadowing experiences, as well as data collected through document review. For this study, constant comparative analysis assisted in ensuring the accuracy of the data used to construct the theory (Glaser & Strauss, 2017).

A second type of triangulation discussed by Merriam and Tisdell (2016) is investigator triangulation. In this study, more than one researcher participated in coding the interviews and considered how the content of the documents and field notes fits the concepts and relationships identified in the coding process. Using more than one researcher to analyze data and compare their findings improves the credibility of research (Merriam & Tisdell, 2016). Having more than one researcher on this study contributed to credibility in constructing theory through numerous discussions about the data (Glaser & Strauss, 2017). The second researcher coded 25% of the interview data to ensure data trustworthiness. Because of the subjective nature of the open coding phase, the two researchers coded the interviews together, discussing each line of the transcripts until they reached agreement. Likewise, the two researchers met and discussed selective codes and the overarching themes that became the theory presented in this study.

A third type of triangulation includes the use of multiple sources of data collection (Merriam & Tisdell, 2016). This type of triangulation allows for further comparisons of data.

Shadowing the district inclusive education coach allowed the researcher to observe him in various settings. Conducting follow-up interviews with the coach allowed the researcher to compare information he provided at different times in the study with other data collected from other sources by the researcher. Finally, interviewing participants from different levels of the school system (i.e., district and school) or within the same level (e.g., district or school personnel) provided multiple perspectives to triangulate the data further.

Member checks are one way to ensure that the data used for the research is accurate. Data accuracy is achieved when each participant in the study reviews the transcript of their own interview (Weaver-Hightower, 2019). After transcribing each interview, the researcher emailed each transcript to the participant interviewee. The researcher asked each participant to read their interview transcript and make any changes (i.e., additions, clarifications, or deletions) that they thought would better reflect the intent of their responses. The researcher only analyzed transcript content after member checks were completed.

Reliability or consistency is defined by Merriam and Tisdell (2016) as the ability for the research to be replicated. Weaver-Hightower (2019) contends that more than one researcher coding the data is often used to address qualitative research reliability. The variability in human behavior makes achieving reliability difficult, if not impossible (Merriam & Tisdell, 2016). Therefore, using a second researcher could determine "whether the results are consistent with the data collected" (Merriam & Tisdell, 2016, p. 251). For this study, the second researcher was knowledgeable about the topic and context of the study and had experience with systemic change to include students with ESN in regular education classes. A second researcher with a high level of knowledge and experience, as well as a detailed description of the coding process (i.e., open, selective, theoretical), supports this study's reliability (Weaver-Hightower, 2019).

External validity or transferability refers to the "extent to which the findings of one study can be applied to other situations" (Merriam & Tisdell, 2016, p. 253). Weaver-Hightower (2019) suggests that the use of "verisimilitude" or descriptions that "convey a sense of truth or reality" builds transferability (p. 92). He recommends using explicit descriptions and details when referencing contexts and participants. Merriam and Tisdell (2016) reiterate this idea by suggesting that detailed descriptions make transferability possible for the next person who might explore the same research elsewhere. Ultimately, it would be through the analysis of replicated studies that true transferability might be measured. For this study, descriptions of the participants, interactions, and contexts provide a means for building transferability.

Positionality

Weaver-Hightower (2019) advises the researcher to present themselves as "relatable, open, honest, and sensitive about their reactions and biases" toward their research (p. 100). Charmaz (2021) refers to "developing a methodological consciousness" (p. 178) by making reflexivity as crucial to the method as any other process used throughout the research. Reflexivity involves the researcher recognizing and explaining how their "hidden beliefs enter the research process" (Charmaz & Thornberg, 2021, p. 178), thus making the research more credible.

As a researcher, I have chosen this topic for reasons that are personal to me. As a teacher who has worked in inclusive classrooms, I often asked for assistance in meeting the needs of all my students, including those with ESN. Specifically, I asked to be observed and provided with feedback to improve my strategies, supports, and materials or to assist with challenging behavior. Unfortunately, these requests were not met. At the time, I did not realize that what I was asking for was coaching. As I embarked on this study, I hoped to learn about the role of a district

inclusive education coach, so I might be able to assist other school personnel who struggle with obtaining the assistance they need in their classroom.

As an advocate working with many families with students with ESN in public schools, too often, I have seen the lack of experience and skills of hard-working educators when asked to include these students in their classrooms. Without support, the teachers become frustrated. They are often unaware of research-based strategies (e.g., differentiated instruction, universal design for learning, embedded instruction) and how to incorporate these into their lessons. They sometimes see the difficulty of including a student with ESN as a deficit in the student rather than their lack of knowledge, skills, or experience.

Even when a consultant with experience and knowledge comes for the short term, I have witnessed students who had the opportunity to benefit from inclusive education practices return to more segregated settings. The calling out of my experience is not to fault the educator because I have felt unsuccessful in a similar circumstance. However, as I began this study, I believed that if a district provided coaching, the teachers and the students would experience success over the long term.

Finally, as a parent of a child with ESN, I would not have trusted educators to include my son in an inclusive regular education class successfully, nor would I have trusted them to consider him competent or to provide the support he would need to be successful. I speak this truth retrospectively, as my son died before he was of age to begin public school, and, if I am honest, that was one small relief to his passing. As I embarked on this study, I hoped to provide evidence that systems can change so other parents with children like my son could trust and expect their child to participate actively in inclusive regular education classes and schools.

Throughout this study, I hoped to develop methodological consciousness by continuing to be reflexive about my beliefs and biases. I also hoped to be reflexive about my responses to the participants in the study and the stories they shared with me.

Ethics

Approval for this study has been granted by the Institutional Review Board (IRB) of the University of North Carolina, Greensboro (UNCG). The researcher conducting this study and the second researcher who assisted with coding have completed the required CITI training modules. The district where this study took place provided the researcher a letter of support expressing their understanding of the research purpose and the data collection procedures, as well as their approval of the researcher completing this study in their district.

The researcher provided informed consent forms approved by UNCG IRB to all research participants before collecting data. The researcher asked participants to sign the consent forms to acknowledge their understanding of the study and agreement to participate. Participation in this study was voluntary. The researcher explained to each participant their right to opt out of the study at any time and, if they did opt out, how their information would be deleted and not included in the final analysis.

To ensure anonymity, the researcher used the participants' roles to identify each participant and did not include any school or district names. Only the researcher had access to all of the research data. The second researcher only had access to selected interview transcripts which had been redacted to ensure anonymity. All digital data collected for this study was kept in password-protected files on a password-protected computer. A master list linking the participant names to a code representing their roles was maintained. Data will be destroyed ten years after the completion of this study.

Conclusion

The purpose of this study was to begin to understand the role of a district inclusive education coach working within an ongoing, successful district-wide systemic change endeavor. The researcher used an interpretive paradigm to accomplish this using a constructivist grounded theory methodology within a single case study. To conduct this study, the researcher used three phases of interviews with a district inclusive education coach, two phases of shadowing with field notes, single interviews with participants chosen through a combination of purposeful and convenience sampling, and documents to construct a theory about the role of the district coach in facilitating systemic change within the bounded system of the district.

The researcher analyzed the data through three coding phases. A second coder participated in coding 25% of the interview data during the first two coding phases and participated in multiple conversations during all three phases of analysis. The researcher constructed a theory based on the coding of interview transcripts and field notes, the categories encompassing those codes, and the interpreted relationships among the categories. The researcher used documents to supplement and verify the interpretive findings from interviews and field notes.

The theory that emerged from data collection and analysis was based on the researcher's interpretations. The researcher represented the experiences and words of the participants with consideration and sensitivity while acknowledging her own beliefs, experiences, and biases

CHAPTER IV: FINDINGS

For this case study, the researcher analyzed data from 11 interviews, six days of shadowing with field notes, and selected documents to answer the following research question:

> What is the role of a district inclusive education coach in facilitating sustainable systemic change at classroom, school, district, and state levels designed to increase the inclusion of students with extensive support needs in regular education classes?

A description of the findings of this study begins with the experiences and qualities of the district inclusive education coach gleaned from interviews with the coach and other participants, as well as through the researcher's shadowing experiences. Next, the researcher provides a representation of the developed theory through eight concurrent strategies the coach used, which fall within two separate and co-occurring themes, each divided into four levels (i.e., the classroom, school, district, and state levels). Finally, the researcher explains the preliminary theory through definitions and examples obtained from the collected data.

Prior Experiences and Qualities of the District Inclusive Education Coach

Prior to being the district inclusive education coach in his current district**, t**he coach had worked in education for over 20 years and had an advanced speech-language pathology (SLP) degree. After working for many years as an SLP in both the public and private sectors, he spent several years as a teacher in elementary, middle, and high schools, as well as being a school headmaster. Eventually, he obtained a recertification as an SLP and returned to the role of an SLP in schools. In that role, he worked with students at multiple grade levels, many of whom had complex communication needs, which eventually prompted him to get certified as an Assistive Technology Specialist.

As an SLP working after the establishment of the Education of All Handicapped Children Act (EAHCA), he was required to offer push-in services (i.e., speech services embedded within regular education contexts and activities). This requirement resulted in extensive experiences with co-planning and co-teaching across multiple grade levels, as well as learning to embed instruction to meet IEP goals within regular education contexts and activities. Successful co-planning and co-teaching provided ample opportunity for the coach to build positive relationships with several district-level personnel, as well as school personnel, such as other related services providers, general and special educators, and administrators.

Through his prior work within a district that embraced inclusive practices, the coach had the opportunity to work with national specialists in the field when the district employed technical assistance providers to assist with the district's desired changes toward inclusive practices. The coach's experience as an assistive technology specialist and his work with assistive augmentative communication brought him to the front lines of the district planning and change efforts, and furthered his experiences with inclusive practices, collaboration with school and district-level teams, and the provision of his first experiences working with Membership, Participation, and Learning Indicators (Jorgensen et al., 2010; McSheehan et. al., 2009).

Eventually, his role changed to include working as a coach for his prior district. In that role, he met monthly with school-based teams to collaborate with groups of school personnel as they brainstormed ideas and developed action plans for including individual students in regular education classes, and worked to facilitate students' access to the general education curriculum.

After retiring from this role as a coach and assistive technology specialist at the previous district within the same state, the coach began working for the school district where the researcher completed this case study. Many of the other study participants described how his

previous roles as teacher, headmaster, SLP, Assistive Technology Specialist, and coach provided experiences that contributed to his success as the district inclusive education coach. One participant explained that these previous experiences are not necessary for an inclusive education coach in general, but those prior experiences provided him "that perspective, especially if you're doing system change work, because you know how complex it is going to be."

The researcher asked all study participants to explain what qualities the district inclusive education coach possessed that contributed to his success in his role. Seven of the eight other participants described the calm quality of his personality. Participants used terms such as zen-like, laid-back, gentle in soul, approachable, and easygoing as descriptors for this quality. Also, this calming quality was noted in his interactions with students and was a reason for wanting him in their classrooms.

Participants also described the coach as being organized and a good listener. Several participants mentioned his ability to guide them without making them feel like they were being told what to do. He introduced ideas to them in a way that was not pushy or insistent. One person elaborated on this, saying he "drops pebbles of thought and then sees what folks need to move forward." He allowed the staff and the mentored coaches to try their own ideas, while at the same time, he remained available for questions and open to his own continued learning.

The coach's ability to collaborate successfully with others also was noted. Participants described him as being respectful in his interactions with others and very good at building relationships. He encouraged school-based and education teams to think through solutions to their concerns, while supporting them in that process. He knew how to step back as the team members became more comfortable with inclusive practices and including students with ESN in regular education classes.

The researcher also observed the coach's ability to build relationships. During the six days, the researcher shadowed the district inclusive education coach as he visited seven elementary schools and one middle school. Upon arriving at each school, the coach stopped in the front office to check in and took the time to converse with the office personnel. It was clear the coach had built positive relationships with these individuals as the topics of the conversation went beyond expected pleasantries to follow up on previous conversations about family and other more familiar topics. The coach introduced the researcher to the office personnel and then to the principal and assistant principal if they were in their offices and their doors were open. The researcher viewed his interactions with all personnel during these school visits as friendly, and it was clear that others found the coach to be easily approachable.

Finally, multiple participants mentioned the coach's flexibility. He worked with and built relationships with new teachers as students were promoted to the next grade level and when schools experienced staff or administrative turnover. He understood that change takes time, that schools achieve change at different paces, just as students do, and that taking small steps toward change is okay and should be celebrated.

While the researcher was shadowing, the coach met with students' education teams in several schools. Sometimes, he worked with different teams within the same school, with teams composed of various members, such as general and special educators, administrators, related services providers, and district specialists. He maneuvered successfully within each school and team, scheduling early morning meetings with some teams, late afternoon meetings with others, and during the school day for others, all based on the team's preferences. His flexibility allowed him to accommodate the specific needs of each school and each school-based team.

As observed during one team meeting at an elementary school, the team finished updating a student's outcomes on the membership, participation, and learning (MPL) tool. Then, they began discussing some challenging behaviors the student had begun to exhibit. The coach remained quiet throughout the conversation, even after the team had finished sharing their thoughts. After a few moments, one team member, a behavior specialist, stated they should try providing positive rewards more frequently and offer some play-based work options in class. The climate in the room began to shift, and it was at this point that the coach spoke. He reviewed the student's improved outcomes based on the MPL indicator tool and attributed that success to the team's hard work.

After the meeting, the researcher asked the coach about the observed interaction. Specifically, the researcher asked about the coach's silence while some team members seemed to be complaining and shifting towards a negative perspective. The coach explained that there had been some staff changes during the past year, but it was vital that he did not interrupt or jump in to try to solve problems for the team. He said a lot of his job, especially at this point in the year, is to listen and encourage, "You know, you just have to give them the space to realize [what they know]."

Theory Development

The preliminary theory developed from this case study emerged from the constant comparison of eleven interview transcripts and field notes written over six days of shadowing the district inclusive education coach. The district hired the coach to assist them in their systemic change endeavor to (a) move students with ESN from segregated self-contained classrooms and schools to regular education classes, (b) increase the use of evidence-based practices to provide access to the general education curriculum for the students with ESN, (c) increase student

academic and social engagement in regular education contexts, and (d) improve student outcomes in the general education curriculum. To do this, the coach focused on increasing each student's *membership* in regular education contexts, *participation* in regular education classes and activities, and *learning* across the general education curriculum.

The data analysis yielded two overarching themes or objectives behind every strategy in which the coach engaged. The researcher identified these themes as "Understanding the Context" and "Building Capacity." The themes were broken down into subthemes that align with the levels of the education system identified as "Classroom, School, District, and State" to identify the coach's role and interaction at each system level and align the theory to the research question.

When "Understanding the Context," the coach worked to understand the changing environment, activities, expectations, reactions, or interactions surrounding students or stakeholders at the classroom, school, district, or state system levels. As the coach built his understanding, he used concurrent strategies to make decisions about the next steps, which gave him a deeper understanding of the context.

When "Building Capacity," the coach worked to improve the understanding, abilities, skills, practices, interactions, or outcomes of students or stakeholders at the classroom, school, district, or state system levels. As the coach facilitated the capacity building of the students and stakeholders, he made decisions about the next steps by engaging in concurrent strategies. These concurrent strategies, in turn, gave him a deeper understanding of the capacity of individuals at each level. These themes were evidenced in a cyclical pattern and, at times, co-occurred as the coach conducted the eight concurrent strategies.

The subtheme “Classroom” refers to data related to the individual students included in the regular education classes. The subtheme “School” refers to data related to individual stakeholders within the school who work directly with the student, such as the school-based team, often called the MPL team. This subtheme also refers to data related to the school staff, including administrators, because the coach also worked with the entire school personnel. The subtheme “District” refers to data related to stakeholders at the district level and any district-wide work engaged in by the coach. For example, the coach worked with stakeholders from multiple schools across the district. Finally, the subtheme “State” refers to data related to state-wide stakeholders. These could refer to state-level leadership teams or when the coach worked with multiple stakeholders from multiple districts across the state.

An examination of selective codes revealed eight concurrent strategies used by the coach that allowed him to both understand the context and build capacity at each level of the system to accomplish the primary goal of increasing the membership, participation, and learning (MPL) of students with ESN in regular education classes. These concurrent strategies are as follows:

- using tools (tools);
- reflecting on the strengths, needs, and outcomes of students and stakeholders (reflect);
- supporting and encouraging stakeholders (support);
- facilitating access to the general education curriculum for students with ESN (access);
- changing mindset (mindset);
- de-siloing general and special education (de-silo);
- collaborating; and
- providing resources and professional development (PD).

The researcher used abbreviations for the data sources used for this study. Table 3 provides the abbreviations and their definitions.

Table 3. Abbreviations of Data Sources

Abbreviation	Data source
C1, C2, C3	Three interviews with the initially hired district inclusive education coach
Ca, Cb	Interviews with two newly hired coaches
D1, D2	Interviews with two district personnel
G	Interview with general education teacher
S	Interview with special education teacher
SLP	Interview with speech/language pathologist
T	Interview with the technical assistance provider
F1, F2, F3, F4, F5, F6	Field notes from shadowing experiences days 1-6

Table 4 provides the chain of evidence, or saturation of each selective code related to the first theme, "Understanding Context." Table 5 provides the chain of evidence of each selective code related to the second theme, "Building Capacity." In both tables, the abbreviations of the data sources from Table 3 provide evidence for each theme and subtheme as it relates to each of the concurrent strategies used by the coach.

Table 4. Chain of Evidence Over Data Sources for Theme One: Understanding Context

	Tools	Reflect	Support	Access	Mindset	De-silo	Collaborate	PD
Classroom	C1, C2, C3, Ca, Cb, D1, SLP, T, F1, F2, F3, F5	C2, D1, G, S, SLP, F2, F3, F4, F6	C2, D2, F3	C1, C2, Ca, Cb, D1, G, S, SLP, T, F1, F2, F3, F4, F5	C2, Cb, D1, G, S, SLP, F2, F3, F4, F6	C1, Ca, G, S, F1, F2, F3, F4	C1, C2, C3, Ca, Cb,D1, D2, G, S, SLP, T, F1, F2, F3, F4,	C1, C2, Ca, Cb, SLP, F1, F3, F4, F6
School	C1, C2, C3, Ca, Cb, D1, S, T, F3, F5	C2, C3, Ca, Cb, D1, D2, G, S, T, F5	C2, C3, Ca, Cb, D2, G, S, SLP, T, F1, F2, F3, F4, F5	Ca	C2, C3, Ca, Cb, D1, D2, G, S, T, F3, F5	C1,	C1, C3, Ca, Cb, D1, D2, G, S, SLP, T, F1, F2, F3, F4, F6	C2, C3, Ca, Cb, D1, D2, SLP, T, F3, F6
District		Ca, S	D2		Ca, S		C2, C3, Ca, Cb, D1, D2, S, T, F3, F6	T
State							C2, C3, Ca, D1, D2, S, T, F3	

Note. PD = Professional Development

Table 5. Chain of Evidence Over Data Sources for Theme Two: Building Capacity

	Tools	Reflect	Support	Access	Mindset	De-silo	Collaborate	PD
Classroom	C1, C2, C3, Cb, D1, T, F1, F2, F3, F5	C1, C2, C3, Ca, Cb, D1, D2, G, S, SLP, F1, F2, F3, F4, F6	D2	C1, C2, Ca, Cb, G, S, SLP, T, F1, F2, F3, F4, F5	C2, C3, Ca, Cb, D1, D2, G, S, SLP, F1, F2, F3, F4, F6	C1, C2, C3, Ca, Cb, G, S, F1, F2, F3, F4, F5	C1, C2, C3, Ca, Cb, D1, D2, G, S, SLP, T, F1, F2, F3, F4, F6	C1, Cb, SLP, T, F1, F2, F4, F6
School	C1, C2, C3, Ca, Cb, D1, D2, S, SLP, T, F1, F2, F3, F4	C1, C2, C3, Ca, Cb, D1, D2, G, S, SLP, T, F1, F2, F3, F4, F5, F6	C1, C2, C3, Ca, Cb, D2, G, S, SLP, T, F1, F2, F3, F4, F5	C1, C2, C1, Cb, G, S, SLP, T, F1, F2, F3, F4, F5	C1, C2, C3, Ca, Cb, D1, D2, G, S, SLP, T, F1, F2, F3, F4, F5, F6	C1, C2, C3, Ca, Cb, D1, S, T, F3, F4	C1, C2, C3, Ca, Cb, D1, D2, G, S, SLP, T, F1, F2, F3, F4, F6	C1, C2, C3, Ca, Cb, D1, D2, S, SLP, T, F1, F2, F3, F4, F6
District	C1, Ca	Ca, Cb, D2, S, T, F3, F5, F6		Ca, Cb, T, F1, F3, F4	Ca, Cb, D2, S, T, F3, F5, F6	C2, C3, Ca, Cb, T, F3, F5	C1, C2, C3, Ca, Cb, D1, D2, S, T, F3, F6	C1, Ca, Cb, D1, D2, SLP, F5, F6
State	C2						C1, C2, C3, D1, D2, T, F3	

Note. PD = Professional Development

When analyzing the data from the interview transcripts and field notes for each concurrent strategy, the researcher interpreted whether the quotations coded for each concurrent strategy represented "Understanding Context" or "Building Capacity" and for which subthemes. The researcher identified multiple themes and subthemes for many of the quotations for the concurring strategies. For example, one quotation from an interview transcript described how the coach collaborates with the school-based team to differentiate assessments and lessons for students. The researcher coded the quotation as "Access." Then, the researcher interpreted this as "Understanding Context" for "classroom" because differentiation requires a thorough understanding of the student. The researcher also coded this as "Building Capacity" for "classroom" and "school" because differentiating assessments and lessons would build the capacity of the student to access the general education curriculum, and it also builds capacity at the school level by providing stakeholders with experience in collaborating, co-planning lessons, and evaluating student outcomes.

Table 6 provides the saturation of each subtheme across concurrent strategies for "Understanding Context" and "Building Capacity." It is clear from these tables that the data indicate an emphasis on the subthemes for "classroom" and "school" across both themes. At the "district" level, the coach engaged more with "Building Capacity" than "Understanding Context." At the state level, there was an equal emphasis on both themes, but the data centered on the concurrent strategy of "Collaborate."

Table 6. Saturation of Subthemes

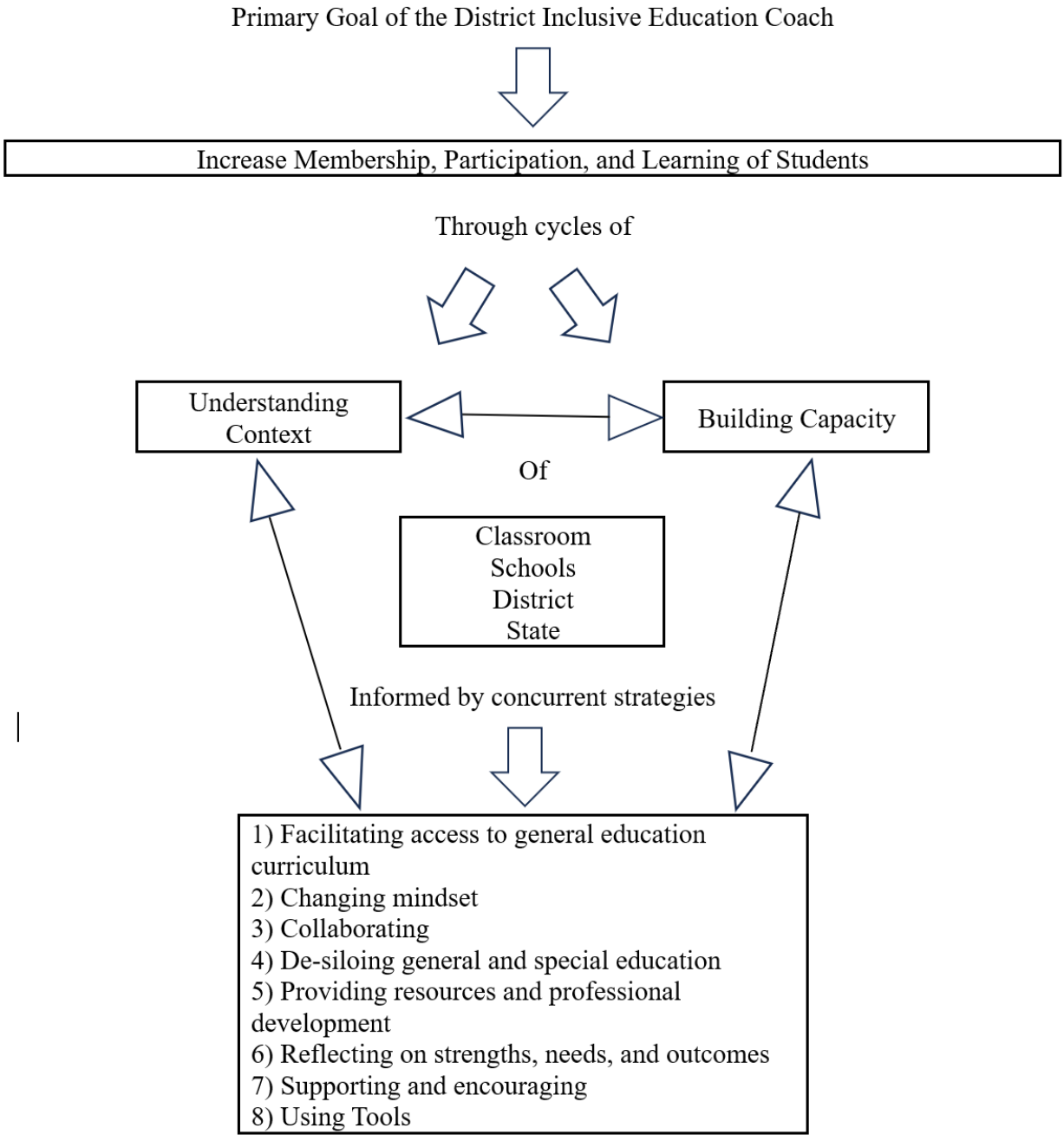
	Understanding Context				Building Capacity			
Concurrent strategies	Subthemes							
	Classroom	School	District	State	Classroom	School	District	State
Tools (n = 194)	59	46	1	0	37	119	4	2
Reflect (n = 160)	66	78	5	0	64	85	5	0
Support (n = 67)	4	60	1	0	1	56	0	0
Access (n = 80)	50	1	0	0	67	28	18	0
Mindset (n = 118)	28	58	2	0	52	101	17	0
De-silo (n = 41)	18	1	0	0	31	25	14	0
Collaborate (n = 241)	85	97	49	23	93	168	77	2
PD (n = 161)	26	36	2	0	18	109	26	0
TOTAL	**336**	**377**	**60**	**23**	**363**	**691**	**160**	**24**

Note. PD = Professional Development

Preliminary Theory

Figure 1 represents a diagram of the preliminary theory developed from this study. The coach's primary goal (i.e., increasing student membership, participation, and learning) is at the top of the figure. The double-sided arrows between the two themes (i.e., building capacity and understanding context) illustrate that these can co-occur as the coach engages in his role. The double arrows between the concurring strategies and the two major themes represent how the themes and the concurrent strategies inform each other. In summary, the preliminary theory emerging from this study is that the coach uses concurrent strategies to understand the context and build capacity at the classroom, school, district, and state levels of the education system to increase the membership, participation, and learning of students with ESN in regular education classes.

Figure 1. Preliminary Grounded Theory Model of the Role of the District Inclusive Education Coach



The following section describes the concurrent strategies used by the district inclusive education coach. These descriptions are based on the researcher's interpretation of the data collected from interview transcripts, shadowing with field notes, and documents. These descriptions include examples of each strategy and how each strategy relates to the themes (i.e., Understanding Context and Building Capacity) and subthemes (i.e., Classroom, School, District, State) of the preliminary theory. The researcher also included participant quotes relating to the different aspects of the coach's role.

Concurrent Strategy #1: Using Tools

The coach used seven tools to increase the membership, participation, and learning of students with ESN in the district. These included: the Membership, Participation, and Learning Indicators tool (MPL; McSheehan et al., 2009); the Evidence-Based Inclusive Practices Snapshot (Classroom-Snapshot; TIES Center, 2020); Communication Passports (University of Edinburgh, n.d.); Transition Summaries developed previously in a neighboring district; the RISE: Reflecting on an Inclusive System of Education (Ryndak et al., 2022); Ten Reasons to Support Inclusive School Communities for ALL Students (10 Reasons Why; Vandercook et al., 2018); and 5-15-45: Linking Available Time with Meaningful Collaboration (TIES Center, 2020).

There were 194 quotations coded for this strategy that supported the emergence of the two themes (i.e., understanding context and building capacity). Each tool used by the coach is briefly described, followed by how these tools were used to assist the coach in understanding the context and building capacity.

Tool Descriptions

The Membership, Participation, and Learning tool consisted of 30 measurable indicators adapted from those initially introduced by McSheehan et al. (2009) and later used as a

framework within the *Beyond Access Model* (Jorgensen et al., 2010). The coach used the tool to measure a student's membership, participation, and learning in the classroom and school through ten indicators for each area. Through collaborative consensus with the student's education team members, each indicator was scored from zero through 3 to describe whether the behavior occurred none of the time, some of the time, most of the time, or all of the time. Each of the three areas measured had the potential of 30 points.

The Evidence-Based Inclusive Practices Snapshot (Classroom Snapshot; TIES Center, 2020) was a tool that allowed the coach to document whether and how often the adults used evidence-based practices in the classroom, whether and how materials were adapted to meet the learning needs of the students, and where the student was located in the classroom relative to his or her classmates without IEPs. Additionally, this tool allowed the coach to complete 15 minutes of data collection using time sampling (i.e., cycles consisting of 45 seconds of observation followed by 15 seconds of data collection) to look for the student's means of communication, student engagement, and student's interactions with the teacher, classmates, or a paraeducator. The tool also cued the coach to document additional information in observation notes.

The Communication Passport (University of Edinburgh, n.d.) was a tool used by a student's education team to share information that a student with complex communication or sensory needs might need assistance communicating to their education team for the next school year. For example, it documented from a first-person perspective any tools or technology the student used to assist with their communication, mobility, eating, or drinking. It also described a student's likes and dislikes, family, friends, and anything else that might assist new education team members who will provide services to that student in the coming year. They were

developed by team members who knew the student and were shared with the new education team members.

The Transition Summary was a tool used at the end of a school year that described the student from the perspective of the adults who have worked with them during the year. It listed the student's strengths, interests, talents, and successful strategies used within the classroom to assist with academic, social, communication, behavior, or any other needs the student might have had, including assistive technology the student used successfully. The Transition Summary included any strategies and/or supports that had not been effective during the school but which could potentially be tried again in the following year. Additionally, this tool included a summary of the student's MPL progress throughout the year and areas of focus for the following school year.

The *Reflecting on an Inclusive System of Education* (RISE; Ryndak et al., 2022) was a tool used with leadership teams at the school, district, or state levels to assist them in determining their strengths and areas of need when considering inclusive educational practices. The tool comprised four areas of focus (i.e., placement and settings; general education curriculum content and access; instructional practices; and student and system outcomes), each delineating multiple indicators of evidence-based practice. With an external facilitator, a state, district, or school leadership team discussed each focus area and then determined which of the areas they would concentrate on to develop an action plan for their system.

Ten Reasons to Support Inclusive School Communities for ALL Students (10 Reasons Why; Vandercook et al., 2018) was a tool that described the importance of creating and supporting inclusive practices within the school and district. The 10 Reasons Why included topics related to community involvement, learning opportunities, instructional practices, and peer

relationships. Based on the law and research, it provided the "why" of inclusion and assisted educational and leadership teams in dispelling the myths surrounding the inclusion of students with disabilities.

The 5-15-45: Linking Available Time with Meaningful Collaboration (TIES Center, 2020) was a tool that guided teachers in participating in collaborative co-planning based on the time they had available in their schedules (i.e., 5 minutes, 15 minutes, or 45 minutes). The tool guided the teachers to think carefully about the content that would be taught, instructional strategies for the best learning outcomes, and any barriers to learning that must be considered before engaging students in the classroom.

Understanding Context

Of the 194 quotations coded for the strategy "Using Tools," there were 106 references related to Understanding the Context. Of these 106, 59 were related to understanding the context at the classroom level, 46 were at the school level, and one was at the district level.

The coach used the MPL tool (McSheehan et al., 2009) to understand the context at the classroom and school levels related to the student's activities and interactions within the classroom and schoolwide contexts and activities. The coach reviewed the MPL indicators monthly with the education team and, through collaboration and consensus, documented the number for each indicator (i.e., 0-3) and the percentages achieved for each area of measurement. For example, if the team scored the student with threes on all 10 indicators in a given area, the percentage would be 100. The use of the tool provided rich discussion about how the education team perceived the student's growth related to membership, participation, and learning within the general education contexts. For example, team members discussed how the student participated in class routines, how peers were learning to provide wait time when communicating with a

student with complex communication needs, any new strategies that were explored, and which strategies were most successful for the student.

> The coach regarded the MPL tool highly. During one of the interviews, the coach shared: It was important to have something [a tool] that they could look at on a regular basis and something that was driving change, and that's what the MPL did. It was more than just indicators; it was [a reminder that] this is what inclusion looks like.

During one of the shadowing days, when one of the education teams was asked to share their perceptions of the MPL tool, they replied that it gave them specific areas on which they should focus and helped them to become more aware of how to improve student outcomes (e.g., providing appropriate opportunities for peer interactions). The information gathered throughout the year from the MPL indicators was used to create the student's Transition Summary, which required a thorough understanding of the student's growth, strengths, and focus for the following year at the classroom and school levels.

The coach used the Classroom Snapshot (TIES Center, 2020) to understand the context at the classroom and school levels. The coach observed changes in the teachers' use of evidence-based strategies, the appropriateness of learning materials provided to the students, and the level of interactions between the target student and others in the room (i.e., students, teachers, or paraeducators).

The coach used the RISE (Ryndak et al., 2022) to understand the context at the school level as he worked with school and district personnel to help them articulate their current understanding of inclusive practices and policies across the four focus areas (i.e., placement and settings; general education curriculum content and access; instructional practices; and student

and system outcomes). The RISE was used initially with each school when it first began participating in the systemic change work with continued coaching support.

Finally, the coach used his understanding of the student's strengths and need for supports to be engaged in classroom and school contexts to develop Communication Passports (University of Edinburgh, n.d.) to assist the student's future education team members in understanding the student. The coach also used this tool to document the student's home and community environments, which required the coach to collaborate with multiple stakeholders, including the family. During the shadowing experience, the researcher observed the three coaches and district personnel discussing the importance of the Communication Passports and developing a plan for preparing them over the summer so they would be ready for the student's new teachers in the fall.

Building Capacity

Of the 194 quotations coded for the strategy "Using Tools," there were 162 references related to Building Capacity. Of these 162, 37 were related to Building Capacity at the classroom level, 119 were at the school level, four were at the district level, and two were at the state level.

The coach used the MPL tool (McSheehan et al., 2009) to build capacity at the classroom and school level by using the data collected at each monthly meeting to develop action plans for the education team to increase the student's membership, participation, and learning across contexts and activities. The development of and follow-through on the action plans increased the capacity of the student's membership, participation, and learning outcomes and the education team's ability to meet individual student needs. At the school level, information from the MPL tool was used to assist in developing a plan for fading the support of the paraeducator as the student gained more independence across the classroom and school contexts. As the MPL drove

the change within each classroom and school, the district's capacity to successfully include students with ESN increased. Additionally, data from the MPL tool was shared with state stakeholders as evidence of progress experienced by individual students and the teams working with them.

The coach used the Classroom Snapshot (Ties Center, 2020) to build capacity at the classroom, school, and district levels through follow-up activities based on the data collected with the tool. The coach used the data to provide direct feedback to the teacher or paraeducator observed in the classroom. This feedback was used to acknowledge growth areas, ask questions, or identify areas where further professional development might be needed. The coach also used the data collected to connect the teachers with appropriate district personnel with expertise in an area of need, as well as discover trends across classrooms within schools and across schools within the district to identify overall areas of strengths and the need for further professional development.

Communication Passports (University of Edinburgh, n.d.) and Transition Summaries ensured smooth student transitions. Using the Passports and the Transition Summaries assisted in building capacity at the school and classroom levels by providing education teams in the student's future class or school with an in-depth understanding of the student before the next school year started. Both of these tools were typically developed at the end of a school year and presented to the new education team before the beginning of the next school year. Sometimes, the new education team would be at the same school, but other times, the student would be transitioning to a different school (i.e., elementary school to middle school). These transition meetings were scheduled to occur during the summer and allowed time for members of the new

education team to ask questions, prepare classrooms, and receive any training necessary (e.g., using a communication device).

The coach transferred the percentages from the MPL tool completed during the first and last education team meetings to document each student's progress on membership, participation, and learning to the Transition Summary. The researcher collected five completed Transition Summary documents, including the student's MPL progress data. Table 7 summarizes the start, end, and percentage change for each student in all three areas of documentation. It shows that each student, except for the one male second grader, increased their membership, participation, and learning throughout the school year.

Table 7. Summary of Membership, Participation, and Learning Progress Data

Student		Membership			Participation			Learning		
Gender	Grade	Start	End	% Change	Start	End	% Change	Start	End	% Change
Male	K	3%	100%	+37	26.6%	86.7%	+225	51.8%	85%	+64
Male	K	85.2%	100%	+17.3	59%	100%	+69.5	74.1%	96.3%	+30
Male	K	3%	100%	+37	59.2%	85.2%	+44	60%	83.3%	+38.8
Male	1	6.7%	100%	+3	53.3%	73.3%	+37.5	30%	70.1%	+134
Male	2	7%	86.7%	-10.6	74%	77%	+4	67%	67%	0

The coach used the RISE (Ryndak et al., 2022) with each school as they began participating in the district's systemic change endeavor. The coach then met quarterly with the school-level team and district personnel to review the school's action plan and make any necessary adjustments. The coach used the RISE to build capacity at the school level as the school team monitored and documented progress on their action plan. As each school began to participate in the district-wide systemic change endeavor and made progress on its action plan, the district's capacity increased and moved closer to overall sustainability.

The coach introduced the use of the 10 Reasons Why (Vandercook et al., 2018) and the 5-15-45 (TIES Center, 2020) to build capacity at the classroom and school levels. Multiple participants stated they found these tools useful. The 10 Reasons Why were sometimes provided as a school or district-wide professional development activity and, sometimes, each reason was presented individually throughout the year at monthly faculty meetings. This tool facilitated a solid understanding of the importance of inclusion and its benefits to all students, as well as assisted stakeholders in embracing the systemic change endeavor.

The 5-15-45 tool (Ties Center, 2020) was introduced to education teams who worked with a student in their classroom. Team members had access to the online videos and the co-planning forms, which made this tool very user-friendly. The ability to successfully co-plan built capacity at the classroom and school levels, benefiting the faculty and the students.

Concurrent Strategy #2: Reflecting on Strengths, Needs, and Outcomes

The district inclusive education coach reflected on the strengths, needs, and outcomes of students, stakeholders, and the inclusive programs at each individual school to plan his next actions, reflect on the outcomes of those actions, and adjust his next steps based on those outcomes. This strategy required the coach to remain focused on the big picture at the state and

district levels; the individual needs at the school and classroom levels; and each student's individual needs (e.g., academic, social, physical, and communication). Additionally, it required the coach to continuously self-reflect as he considered the outcomes of his actions within the system. As explained by the technical assistance provider:

> personal reflection is a huge quality. You need somebody who can look at themselves and say, 'What did I do really well? What do I need to shift?' Because they're asking teachers to do it, so we have to be able to do it ourselves.

There were 160 quotations coded for this strategy that supported the emergence of the two themes (i.e., understanding context and building capacity).

Understanding Context

Of the 160 quotations coded for the strategy "Reflecting on Strengths, Needs, and Outcomes," there were 149 references related to Understanding the Context. Of these 149, 66 were related to understanding the context at the classroom level, 78 were at the school level, and five were at the district level.

At the classroom level, the coach used tools (e.g., the Classroom Snapshot), informal observations, and notes to understand student levels of engagement, peer interactions, communication, and learning. As one participant noted, "If he was getting to know a student, he would know what their access method was for communication or for assistive technology; he would really know all of those things."

Reflection required the coach to listen more than he spoke. He observed teachers' and paraeducators' use of strategies for improving students' academic, social, and behavioral outcomes. He looked for evidence of co-planning and observed whether any materials the students used provided appropriate support. He noted whether the student's work aligned with

the general education standards, whether the paraeducator provided the appropriate support within suitable proximity when working with the student, and whether changes were evident over time. He also considered whether the adults or classmates working and interacting with the student were facilitating the student's growth toward independence and their use of learned skills in every instance.

The coach used tools (e.g., MPL indicators) at the school level to determine the stakeholders' understanding of inclusive practices and how they interpreted the student's membership, participation, and learning in the classroom and school contexts. He met with the administration to understand their expectations. He combined his observations at the classroom and school levels to understand the climate and culture of each school and the relationships among the stakeholders at the school level. He looked for what he referred to as "liaisons" at each school who could take on more of a leadership role. In the words of one of the district-level personnel:

> He's a really good evaluator of where you are as a person engaged in this work, whether you're a general educator, a special educator, a related service provider, an administrator…He does a nice job of questioning strategies, helping people kind of identify where THEY want to go, asking them what THEY want in order to get there, and then making whatever that thing is, you know, accessible.

The coach reflected on the climate and culture at the district level in the same way he worked to understand them at the school level. At the district level, he needed to understand the district messaging, their long-term action plan, and the roles each leader played to best access their expertise. One newly hired coach stated, "A lot of this job is making connections between

people and finding out what teachers need, and then getting them to the right resources." Often, those resources were other experts at the district level.

Building Capacity

Of the 160 quotations coded for the strategy "Reflecting on Strengths, Needs, and Outcomes," there were 154 references related to Building Capacity. Of these 154, 64 were related to understanding the context at the classroom level, 85 were at the school level, and five were at the district level.

At the classroom level, the coach built the capacity of the education teams working directly with the students. He worked closely with the paraeducators to help them see the value of their role. He understood that the paraeducators were in the position to interact with the general educators with their knowledge of the general education curriculum, the special educators with their knowledge of specially designed instruction and strategies, and with the students to assist them with accessing the content, building independence, and forming peer relationships.

> That was a big part [of my role], you know, actually showing [paraeducators] their value and how important their work in inclusive practices actually is, because in the past they were pretty much babysitters. But they were very knowledgeable about what went on in the classroom. Some of them were steeped in the context.

Participants described the coach as "being very student-centered and student-focused…he got to know the students and what worked [for each of them]." As a result of this focus, he guided the education team members to understand each student's strengths and challenges, and to build their students' capacity to strengthen their own membership, participation, and learning. He built the capacity of the education team members by guiding them to understand their roles to

collaboratively promote students' independence while adjusting their strategies commensurate with the student's growth. He assisted them in reflecting on their roles and actions in the same way that he reflected on his own.

At the school level, the coach built the capacity of school-based and education teams to work together by engaging them in collaborative problem-solving. He guided them in challenging their underlying beliefs and fears about teaching students with ESN and changing their perceptions by continuously focusing on their successful use of strategies and student progress. He consistently used questioning techniques to move all stakeholders incrementally beyond where they were and focused on any positive change, whether in the students or the adults working with those students. As one participant stated, he celebrated small changes "whether that's something that the student is doing that they weren't doing before, or something the grown-ups are doing that they weren't doing before that is supporting inclusive work."

The coach often reiterated that the school was more successful when the administrators actively supported including students with ESN in the regular education classrooms. When administrators were involved, the coach worked with them within the education team processes, reflecting on what had been successful at each school, what previous adjustments had been successful, and celebrating those successes. When administrators were not as involved, the coach engaged them separately by celebrating the documented positive changes in the students and faculty as measured through his use of tools, observations, and collaborations. While keeping them in the loop, he built stronger positive relationships with the administrators. He strengthened the school's capacity by offering professional development ideas and resources and asking for administrators' assistance and feedback to increase their involvement. He did this by reflecting

on the culture of each school and making decisions about how to build the culture in non-directive ways.

The coach built capacity at the district level by engaging with curriculum supervisors and other experts at the district level to connect them with stakeholders at the school level when he saw a need. As each school built its capacity to include students with ESN, the capacity of the district also grew. The coach and the newly hired coaches shared the idea that, to do this work, they had to consistently reflect on their actions and push for change while not "stepping on toes." They all understood that the changes they asked everyone to make were necessary but also were potentially scary endeavors that could bring up insecurities for anyone involved with the changes. The success of those changes required respect for where each person was in their process across the district. According to one participant, the coach's role was to "help people think through and look at the roles and responsibilities of the different positions in that school and in that district so that [the system] was using [each person in] the most effective way."

A review of the documents revealed handwritten notes provided by the coach. These notes contained observation summaries and questions the coach wrote as he grappled with how to assist stakeholders in improving their inclusive practices. In some instances, he would consider connecting stakeholders with expert personnel; in other situations, he would consider other professional development or resources available at the school or district level. The question marks added to his thoughts and ideas revealed the reflective quality of these considerations.

Concurrent Strategy #3: Supporting and Encouraging

The coach and other participants described "Supporting and Encouraging" as one of his crucial roles within the district. When providing support and encouragement, the coach combined his personal qualities of being approachable, welcoming, non-judgmental, and non-

directive with his ability to listen, observe, and be flexible. There were 67 quotations coded for this strategy that supported the emergence of the two themes (i.e., understanding context and building capacity).

Understanding Context

Of the 67 quotations coded for the strategy "Supporting and Encouraging," there were 65 references related to Understanding the Context. Of these 65, four were related to understanding the context at the classroom level, 60 were at the school level, and one was at the district level.

At every level, whether the classroom, the school, or the district, the coach understood the context by listening more and talking less. He observed patiently, looking for even the slightest movements of change toward being more inclusive, looking for ways to support the system movement and opportunities to celebrate those subtle movements. Most of this work occurred at the school and classroom levels, where systemic changes became evident in the services provided to students. He used the tools, meetings with the school and education teams, and classroom observations to improve his understanding of the contexts at the classroom and school levels. He needed to understand the contexts across all levels to coordinate the work among stakeholders at the classroom, school, and district levels.

Building Capacity

Of the 67 quotations coded for the strategy "Supporting and Encouraging," there were 57 references related to Building Capacity. One was related to building capacity at the classroom level, and 56 were related to building capacity at the school level.

One of the district personnel stated that the coaches "are really supporting the grown-ups in a school when a student is included to have that experience be as successful as we all know it can be." This quotation illustrates the importance placed on the coach's support of the

stakeholders and the mindset that the work and experience of including students with ESN in the classroom will be positive and successful.

To succeed as a supporter and encourager, the coach first had to build trusting relationships with the individual stakeholders on school and education teams. This was also reflected in the shift of school cultures from supporting segregated settings to facilitating the development of inclusive contexts. He did this by focusing on and celebrating all successes at every school, as well as validating each person's value.

He encouraged all teams to solve problems collaboratively. He did not interrupt them or judge their ideas. If he had anything to add, he waited until the group had finished and offered his non-directive ideas as inspired by their collaboration and as something they might consider going forward. One participant stated that he encouraged teams to “go with their ideas, even if it wasn’t the way he was thinking it might go.” He provided a safe space for them to grow, learn, and succeed. Every participant expressed having positive and valuable experiences working with the coach that led to their growth.

By encouraging and supporting the stakeholders at the school level, the coach was able to build their passion and leadership to perpetuate the change process. When he celebrated the small movements toward change, it inspired the stakeholders to continue the work and share their successes with others. As stakeholders began to experience more success, the coach gave the stakeholders credit. Eventually, the change endeavor began to take on a bottom-up momentum, rather than being a top-down initiative.

When discussing the role of the coach and the importance of inclusion, one participant stated, “One of the great benefits of [this] work is the impact not only on our kids but on the entire school community, raising expectations of teachers, mindset, and celebrating. All those

things." Entire school communities were positively affected by the work, which increased their capacity, thus increasing the capacity of the district overall.

A review of the documents revealed relevant handwritten notes provided by the coach. These notes contained observation summaries and areas where the coach documented improvements in using evidence-based strategies, increased peer interactions and engagement, and the fading of support from paraeducators. The exclamation marks he added to his thoughts and ideas revealed his celebratory emphasis. These celebrations were shared with stakeholders during school, district, and state-level meetings.

Concurrent Strategy #4: Facilitating Access to the General Education Curriculum

Facilitating access to the general education curriculum for students with ESN was a priority for the district's inclusive education coach as it aligned with the district's systemic change endeavor. Specifically, this strategy aligns with the district's goals to improve student outcomes in the general education curriculum, to use evidence-based practices, and to increase academic engagement. There were 80 quotations coded for this strategy that supported the emergence of the two themes (i.e., understanding context and building capacity).

Understanding Context

The coach worked with the paraeducators and the general and special education teachers to facilitate access to the general education curriculum for students with ESN. Of the 80 quotations coded for the strategy "Facilitating Access to the General Education Curriculum," there were 51 references related to Understanding the Context. Of these 51, 50 were related to understanding the context at the classroom level, and one was related to understanding the context at the school level by ensuring appropriate collaboration between stakeholders to develop student learning materials.

The coach worked with the school-level stakeholders to understand each student's individual strengths and challenges and develop, adapt, and modify learning materials that use those strengths and address those challenges. The coach emphasized the importance of materials increasing student access through engagement and participation. This priority was accomplished by understanding students' likes and dislikes, their communication needs, and the appropriate use of assistive technology.

The coach helped identify appropriate strategies for stakeholders to use to increase student access to the general education curriculum. Different strategies were useful in meeting the learning needs of different students. Stakeholders began to understand that students are not homogeneous. They master learning objectives differently and express their knowledge differently. Using Universal Design for Learning (UDL) was a way to remove the barriers to students' learning. Participants often referenced UDL through ideas but not necessarily through specific naming of the evidence-based practice.

Multiple stakeholders repeatedly voiced the idea of each student being different. With this understanding came the realization that materials could not simply be recycled from year to year or from student to student. Modifications or content students were required to learn, differed across students, with some requiring fewer modifications and others requiring more. In some cases, materials used for one student to practice a learning goal might be used by a different student as an assessment tool.

Understanding each student enabled stakeholders to make individual placement decisions for each student. The district offered general education classes at different levels of rigor (i.e., foundational, academic, honors, and advanced academic). The coach and the stakeholders considered the appropriate placement for students based on each student's strengths and

challenges. They considered the friendships the students had formed with their classmates without IEPs, and the types of in-class peer supports that could enhance the students' independence and discourage over-reliance on a paraeducator or other adult.

Understanding the classroom context assisted stakeholders in seeing the multiple areas of consideration that are necessary when successfully including students with ESN in regular education classes. The words of one participant provided evidence of this idea when they stated, "The barrier isn't the kid, it's the environment, it's the instruction, it's the materials."

Building Capacity

Of the 80 quotations coded for the strategy "Facilitating Access to the General Education Curriculum," there were 113 references related to Building Capacity. Of these 113, 67 were related to building capacity at the classroom level, 28 were at the school level, and 18 were at the district level.

As the coach assisted education teams in building their capacity to understand the students and to develop, adapt, and modify students' learning materials, the students' capacity for engagement, participation, learning, and peer interaction increased. The coach facilitated collaboration among the general education teachers, who were the content specialists, the special education teachers, who provided ideas for presentation and adaptations, and the paraeducators, who made the adapted class materials based on the direction of the general and special education teachers and professional development provided by the coach. The coach's guidance decreased as the team members built their capacity to engage in co-planning and problem-solving to develop units, lessons, and assessments by focusing on the general education curriculum's big ideas and the students' individual learning needs.

The capacity to problem-solve was considered the responsibility of all stakeholders who worked with the students and was facilitated by the coach. If a student was not engaged, participating, or learning, it was incumbent upon the team to figure out what to do. For example, one participant explained, "Well, the kid's not doing this. But [the question is] 'why not?' What aren't we making accessible? What aren't we providing, or could we provide it differently?"

During the shadowing experiences, the researcher observed a science class where students learned about magnets. A student with ESN was included in the classroom and was watching the same video as the rest of the class. All students had a paper and pencil task to complete during the lesson, and all students answered questions about the same concepts. However, for the student with ESN, their paper and pencil task had been adapted with fewer questions and a simplified manner of documenting answers. For example, there was only one written response on the adapted worksheet, and rather than filling in a blank with the correct vocabulary term, the student read statements that included key vocabulary and concepts, and then had to decide if the statement was true or false.

During this visit, the general education teacher shared how her unit and lesson plans were shared electronically with the special education teacher and paraeducators who work with students in her class. She meets weekly with the paraeducator to review the lessons, share the big ideas, and consider the materials the students might need for the upcoming week. In another classroom in the building, the researcher observed the paraeducators developing materials and sharing these with the special education teacher and the coach for feedback.

At the district level, the coach facilitated opportunities for curriculum development through collaboration with district personnel. This collaboration built capacity at the district level as curriculum specialists, related services providers, and school-level personnel expanded the

district's curriculum by adding supports, tools, and strategies for entire core curriculum areas. During the shadowing experiences, the researcher observed all three coaches and the district special education supervisor planning additional curriculum writing days for the upcoming year to develop additional curriculum areas. Multiple participants noted these curriculum writing days as being valuable, productive, and essential.

A review of documents revealed several tools the coach used to collect data to assist team members in learning about their students' strengths and support needs (e.g., MPL, Communication Passports, Classroom Snapshots). The coach also collected data about the alignment of teaching strategies, materials, and interactions between the students with ESN and their classmates without IEPs.

Several professional development presentations and resources covered topics to improve access to the general education curriculum for students with ESN. Some topics included modifying and adapting materials, providing content-specific support, teaching tips, UDL, and collaborative planning. Several documents focused on the paraeducator's role in increasing student independence and fading their support as students gained independence.

Finally, the researcher viewed adapted materials for sixth-, seventh-, and eighth-grade science, social studies, and health. Materials for the same lesson differed in the number of words used (e.g., labels, sentences, or paragraphs) and the use of icons, such as those used with augmentative communication systems. There were also copies of student work samples within the coach's shared documents that included his observations regarding the appropriateness of material adaptations and how closely the materials aligned with the work completed by classmates without IEPs.

Concurrent Strategy #5: Changing Mindset

Changing mindset is necessary to advance systemic change. There might be stakeholders who already have an understanding of the "how" and "why" of a systemic change effort (i.e., inclusive education). However, for many, it is something to be learned and experienced. The district inclusive education coach plays an essential role in providing stakeholders with the knowledge and experiences that allow them to discover the benefits of including students with ESN in regular education classrooms and to embrace the change that leads to sustainable outcomes for all students. There were 118 quotations coded for this strategy.

Understanding Context

Of the 118 quotations coded for the "Changing Mindset" strategy, there were 88 references related to Understanding the Context. Of these 88, 28 were related to understanding the context at the classroom level, 58 were at the school level, and two were at the district level.

Understanding the context at the classroom level to assist with changing mindset required the coach to recognize the changing levels of membership, participation, and learning for each student in the general education classes. For example, when considering membership, the coach considered if the student had a class job, a cubby or locker, or a name tag representing their daily attendance, similar to every other class member. When considering participation, the coach observed whether the student had an effective means of communication and if it was accessible at all times. If the student had a communication device, the coach had to be sure the adults and students in the room understood its use to maximize the participation and learning of the student with ESN. Additionally, the coach considered the level of student engagement and interaction with peers, as well as physical needs required for any student with complex bodies.

As the coach collaborated with the school-based and education teams to increase a student's membership and participation, the student's learning improved. The coach shared that his focus with education teams began with membership and then participation because learning was contingent upon both of these. The coach used the data collected for each student's membership, participation, and learning to show the stakeholders at the school level how their efforts were responsible for positive student outcomes across these indicators.

Understanding the context at the school level to assist with changing mindset required the coach to recognize the school's overall culture and the beliefs of the stakeholders within that school, including the administration, because when administrators were on board, the school was more successful. One participant stated, "When a student is included, if the grown-ups aren't all on the same page to allow that to be successful, then it's not going to be successful." The coach understood the need to change the mindset of stakeholders, which was crucial to the change endeavor's success.

The coach recognized that a change in mindset takes time, and he took the time necessary to build relationships with the stakeholders. He gained their confidence and trust through many conversations in which he made connections, challenged their thinking, asked questions, and provided them with the resources they needed to be successful. At the same time, the coach would identify allies or those who were enthusiastic about including students with ESN at each school location because he knew that excitement for change spread with enthusiasm and experienced success. The coach worked similarly at the district level, building relationships and staying informed of changes made as the district and individual schools built capacity to include students with ESN successfully.

Building Capacity

Of the 118 quotations coded for "Changing Mindset," there were 170 references related to Building Capacity. Of these 170, 52 were related to building capacity at the classroom level, 101 were at the school level, and 17 were at the district level.

Through working with the coach and experiencing the successful outcomes of including students with ESN in their classrooms, the stakeholders began understanding why inclusion was essential and the value of presuming competence (i.e., assuming that all students can and will learn regardless of any disability; Biklen & Burke, 2007). They started to see the benefits of inclusion. The excitement across the school and district grew as the teachers, paraeducators, and administrators began building their capacity to include students through new strategies, co-planning, and coach support. The coach found opportunities for stakeholders to participate in professional development by having them share their successes with others within their schools and within other schools across the district. When stakeholders shared their success with others, the interest across schools and classrooms increased.

The change in mindset across the school and district levels helped build the students' capacity because they were getting more time in the regular education classrooms, more time engaged in the general education curriculum, and more time engaging with classmates without IEPs. Related services providers began considering how to provide their services within general education contexts and activities. Teachers and paraeducators focused on increasing students' independence, and schools that were not yet participating in the systemic change endeavor began reaching out to the coach to increase inclusive opportunities for students with ESN at their schools, too.

As mindsets began to change, the district capacity grew because more schools wanted to participate in the change endeavor. The initial change effort was a top-down endeavor from the state and district. However, after a mindset shift began, the changes took a bottom-up trajectory, with school and district teams working together to build on their success and share resources across the district.

The coach provided professional development on changing mindset. These presentations included why inclusion is necessary, the importance of having a shared vision, and the expectation that all students are general education students and deserve the same respect and opportunities. The professional development included consistent messaging about the presumed competence of all students and making the least dangerous assumptions (i.e., making educational decisions based on presumed competence that, if incorrect, will have the least dangerous outcomes for a student; Donellan, 1984) when including students in regular education classrooms.

One school action plan also included a goal to create shared values and expectations. This section included using shared language about inclusion and school and district programs, supporting joint ownership of students between general and special educators, and understanding that inclusion is a matter of equity. Including students with ESN was a shared concept encompassing all stakeholders at every level of the system. As one of the district personnel indicated, “The mindset that inclusion is effective, and important, and critical, and all those things, that takes a village.”

Concurrent Strategy #6: De-siloing General and Special Education

De-siloing general and special education was a strategy used by the coach that was represented in 41 quotations. The district inclusive education coach conveyed that when working

in schools, the general education faculty sometimes became the leaders for systemic change; other times, it was the special educators, and in one school, the SLP took on the leadership role. The coach intended to take each team and build from where they were to a cohesive team that worked together, each bringing their expertise to the table. The necessary de-siloing also included those who worked at the district level. In the coach's words, “Inclusive practice is about education; not special ed., not general ed. It’s about education.”

Understanding Context

Of the 41 quotations coded for the strategy “De-siloing General and Special Education,” there were 19 references related to Understanding the Context. Of these 19, 18 were related to understanding the context at the classroom level, and one was at the school level.

At the classroom level, the de-siloing of general and special educators took place during collaborative education team meetings. The coach and other participants saw the general educator as the expert on the curriculum and the special educator as the expert on strategies and individualized adaptations. The coach gauged the team dynamics during these monthly meetings by listening, observing, and asking questions to guide the team in working together based on their strengths. These meetings focused on understanding the students' strengths and challenges to better support them as a cohesive team of educators in regular education classrooms. For many stakeholders, these meetings were the first consistent, collaborative opportunities between the general and special educators. During school-level meetings (i.e., faculty or professional development), similar collaborative opportunities were noted by the coach.

Building Capacity

Of the 41 quotations coded for the strategy "De-siloing General and Special Education," there were 70 references relating to Building Capacity. Of these 70, 31 were related to building capacity at the classroom level, 25 were at the school level, and 14 were at the district level.

As with the other concurrent strategies, building the capacity of the students to access the general education curriculum and become participating members of the classroom community occurred as the capacity of the educators to work together toward that common goal increased. As the coach was described as a bridge between the school and district levels, he was also described as a bridge between general and special educators in supporting student success. One participant shared, "The role of the coach was to provide job-embedded professional development to all of the teachers...to help facilitate relationships between general ed. and special ed."

During the shadowing experiences, the researcher observed firsthand how the education teams worked together to develop action plans, problem-solve, and consider how each student's success could be further developed. When interviewing the special educator at one school, she described how she and the general educator would communicate often outside of school hours and just call each other on the phone.

The coach facilitated the de-siloing at the school level by having the general and special education faculty work together to develop lesson plans, materials, units, and assessments in different curriculum areas, including electives (e.g., music, art, health). As the school teams began to build their resources in each area, they began sharing these with other schools in the district. Eventually, the district and the coaches built curriculum development days into the schedule. During the curriculum development days, general and special educators from multiple

schools and the district worked on curriculum writing for specific content areas. These curriculum development days included specialists from the district, curriculum coaches, special education supervisors, and related service providers. These days were very popular with all of the staff across the previously siloed groups, and the district plans to continue to schedule them in the future.

A review of the documents shared by the coach corroborates the district's desire to de-silo general and special education. One school's action plan contains a goal to provide professional learning opportunities and coaching for special and general educators to increase their ability to teach students with ESN through co-planning, co-teaching, and evidence-based instructional practices. Additionally, the coach maintained a collection of documents and resources centered around collaboration and planning between general and special educators, co-teaching strategies, supporting educators working together, and identifying and removing barriers to collaborative working environments.

Concurrent Strategy #7: Collaborating

Collaboration was the strategy used by the coach that participants most discussed, resulting in 241 quotations. This strategy was the only one documented across the classroom, school, district, and state levels, for both themes. Figure 2 represents the percentage of the total quotations related to the stakeholders at the different levels of the system. The ability to use this strategy was seen as a skill demonstrated by the coach, as evidenced in this quote from one participant when asked to explain what makes the coach successful in his role: He has the role of providing on the ground support while being tuned into district support, who has the skill and expertise to collaborate with others… and to do that job-embedded coaching is key [to his success]."

Figure 2. Collaboration Between the Coach and Other Stakeholders

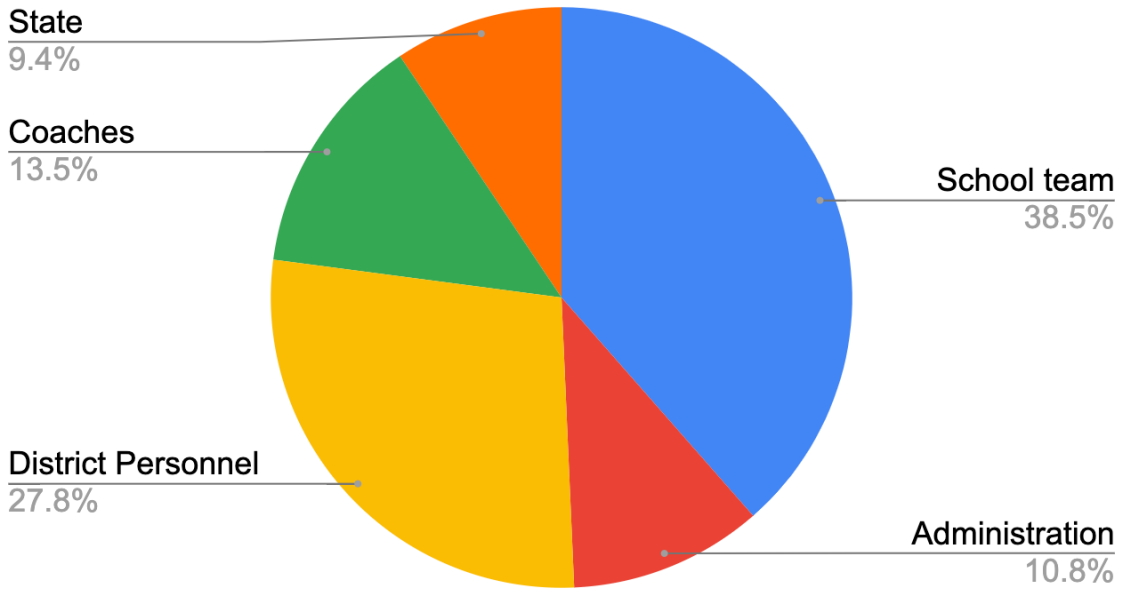


Figure 2 shows that 49.3% of the 241 coded quotations represented the coach collaborating at the school level, emphasizing the coach's collaboration with school-based (8.5%) and education teams (10.8%). Nearly 28% of the coded quotations were related to the coach collaborating with district personnel, and 13.5% were related to his collaboration with the other newly hired coaches he mentored during the fifth year of the systemic change endeavor. The coach's collaboration at the state level represented less than 10% of the coded participant quotations.

Understanding Context

Of the 241 quotations coded for the strategy "Collaborating," there were 254 references related to Understanding the Context. Of these 254, 85 were related to understanding the context at the classroom level, 97 were at the school level, 49 were at the district level, and 23 were at the state level.

The coach collaborated with stakeholders at multiple levels to increase students' membership, participation, and learning within regular education classes. The coach required a thorough understanding of students' strengths and challenges to do this. He collaborated with education teams monthly about individual students. He used the MPL tool with the student education teams to update student success based on the indicators and develop action plans in areas of need. These action plans consisted of strategies and activities the team would use over the next month to build on the success in the three areas.

The education teams at each school comprised different people. There was always a general educator and a special educator on each team who worked directly with the student. Often, there was a principal or assistant principal; sometimes, there were related service providers, specialists from the central office (e.g., behavior specialists, visual therapists, assistive technology specialists) and, at one school, the art teacher. The coach needed to consider the level of understanding of inclusive practices of each team member and the relationships among the team members. If administrators were not involved in any education team meetings, the coach also needed to understand the rationale for their lack of attendance and its positive or negative impact on the education teams.

At the district level, the coach needed to know who was available to meet the specific needs of students or education team members. These could be specialists in specific areas of the curriculum (e.g., math, ELA, science, social studies) or other specialists for student needs (e.g., vision, behavior, assistive technology). During the fifth year of the district's change endeavor, the coach met regularly with the district supervisor of special education for secondary schools, and the two newly hired coaches as part of their mentoring process. These collaborative meetings kept him informed of the other coaches' progress and needs. He also used these meetings to

collaborate on the district's plans regarding which schools would next be engaged in the district change process, which students would be entering new schools, and areas where additional funding might be necessary.

At the state level, the coach collaborated monthly with inclusive education coaches from other districts in the state during cross-district meetings. During these meetings, the coaches shared resources, discussed issues they had at their respective districts, and engaged in problem-solving when necessary. At times, state-level personnel also attended these meetings and kept everyone informed about available resources or changes occurring at the state level. At first, these meetings were only between the two districts involved in systemic change through the TIES National Technical Assistance Center. However, by the fifth year, these meetings included multiple districts statewide. Additionally, the coach participated in meetings at the state level, collaborating on future plans, and updating the state on the work completed at the district level.

Building Capacity

Of the 241 quotations coded for the strategy “Collaborating,” there were 360 references related to Building Capacity. Of these 360, 93 related to building capacity at the classroom level, 168 were at the school level, 77 were at the district level, and 22 were at the state level.

As the coach collaborated regularly with the school-based stakeholders, their capacity to successfully include students with ESN in the regular education classes increased with each student's membership, participation, and learning outcome measures as evidence. The decreasing amount of the coach’s direction during the meeting provided evidence of the capacity building of the education team members. While the coach still attended, another team member ran monthly meetings at several schools and tracked the students' progress. At the end of the year, the team reviewed each student’s progress and developed a transition summary that would follow the

student to the next school or classroom. This built the capacity of the student's next education team and allowed them to understand the context of the student who would be attending the following year. The coach's collaboration with school administrators was also instrumental in building school capacity as he worked to increase administrative buy-in of those who were not yet fully engaged in the work.

As the coach became familiar with the many district personnel, it allowed him to facilitate collaboration between the district and the schools. This built the capacity of the school teams and, in turn, the district's capacity. At the same time, his collaboration with the newly hired coaches built their capacity to coach, increasing the district capacity with three coaches able to engage with many more schools than the original coach could engage by himself. One of the district personnel stated, "What's been really valuable about all of this is the vertical alignment between the schools and the district." This quote highlights the coach's role as a bridge between the schools and the district.

The coach's involvement at the state-level cross-district meetings assisted in building capacity at the state level through the continued sharing of resources and ideas among districts. Through his involvement on the state inclusive education leadership team, he provided updates on the successful developments at the district level and received a broader state-wide view from stakeholders (e.g., district administrators, state-level personnel, parent training organizations, advocates for inclusive practices) participating in those meetings.

Within the coach's documents were emails among general and special educators, the coach, and paraeducators about lesson and unit planning ideas. In these emails, they shared ideas for adapting materials and online resources that could be incorporated into the classroom. School-based action plans provided evidence of their problem-solving and the actions that

school-based team members planned to increase the successful inclusion of students with ESN. There also was evidence of professional development that was co-planned and co-presented by the coach and district specialists about specialized topics (e.g., communication devices, assistive technology).

Concurrent Strategy #8: Providing Resources and Professional Development

Providing resources and professional development was a strategy used by the coach that was represented in 161 quotations. The coach provided professional development formally to groups of individuals at the school and district levels. However, professional development was also embedded through the coach's day-to-day experiences interacting with stakeholders. Resources that he provided included paper or online resources, but often were in the form of personnel with specialized expertise in an area of need.

Understanding Context

Of the 161 quotations coded for the strategy "Providing Resources and Professional Development," there were 64 references related to Understanding the Context. Of these 64, 26 were related to understanding the context at the classroom level, 36 were at the school level, and two were at the district level.

The coach needed a thorough understanding of the students within the classroom context to identify the appropriate content for professional development and resources at the classroom level. The coach obtained this information through classroom observation, data collection, and collaboration with individual teachers, as well as school and education teams, to provide targeted interventions to increase classroom membership, participation, and learning based on the data collected.

Understanding the context at the school level required the coach to identify the individual needs of the stakeholders. The coach gathered this information through classroom observations, discussions with administrators, and direct conversations with stakeholders who reached out for assistance with specific needs. The coach never recycled professional development from one group to the next because each context differed. Instead of recycling professional development activities and materials, the coaches all described how they would modify and adapt the content based on their knowledge of the groups with which they were meeting, while keeping the messaging consistent with district priorities.

The coach maintained an understanding of the district's priorities through monthly meetings with district personnel. Additionally, the coach had to thoroughly understand the roles and names of all the district specialists who could assist in providing professional development in areas where the coach might not have had all the necessary knowledge and experience.

Building Capacity

Of the 161 quotations coded for the strategy "Providing Resources and Professional Development," there were 153 references related to Building Capacity. Of these 153, 18 were related to building capacity at the classroom level, 109 were at the school level, and 26 were at the district level.

The coach's provision of appropriate resources and targeted professional development at the school level directly impacted the students, thereby building capacity at the classroom level. Some topics covered for professional development included using AAC devices for participation and learning, appropriate use of paraeducators, fading support toward independence, and increasing peer support.

Some resources for school personnel included lesson and unit plans developed within other schools, through district curriculum planning, or by other online entities. Professional development topics for school-level stakeholders included increasing push-in services from related services providers, embedding instruction on IEP goals, developing adapted materials, and using evidence-based practices such as Universal Design for Learning, co-planning, and co-teaching. The professional development provided by the coach never reflected a "one-and-done" approach. The coaches all expressed that their role was to follow up and keep the messaging consistent and frequent. The coach's role at this level was vital because he was strategically placed to "get resources into their hands" based on his knowledge and experiences, observations across schools and districts, and knowledge of the resources available within the district.

The coaches prepared online modules at the district level that school-based and education team members could access. They began building the capacity of individuals at each school to act as school leaders to provide professional development or lead school-based and education team meetings. As one of the newly hired coaches stated, "At the district level…we're branching out where [we] are doing trainings at principal meetings, assistant principal meetings, related services provider meetings, and team leader meetings. All of those." It was important for the coaches to engage in this type of capacity building that would lead to sustainability within the district. Finally, they began branching out across the district as they engaged new schools, including high schools, for the first time in the district's systemic change plan. For each new participating school, the coaches engaged in professional development planning with the administrators and developed a school action plan with school leadership teams with the RISE.

Documents provided by the coach revealed an array of topics for professional development in the form of visual presentations, articles, briefs, and tools. Some topics included

assistive technology, push-in services, co-planning, co-teaching, behavior supports, sensory supports, mobility, vision, communication, curriculum supports, helping v. hovering, UDL, mindset, peer supports, and tools. One school's action plan specified that coaching and professional development would be used to build stakeholders' capacity to use inclusive practices. The state application for working with the TIES National Technical Assistance Center specified a state objective to ensure (a) stakeholders have access to both coaching and professional development materials, etc.; and (b) professional development for all related services providers, paraeducators, and hourly personnel provides wrap-around supports when needed. Additionally, the Classroom Snapshot provided information on strategies that were or were not yet used. The coach used this information to determine the subsequent direction for individual teachers, additional resources needed, or connections between schools and district specialists.

CHAPTER V: DISCUSSION

The purpose of this qualitative grounded theory case study was to begin to understand the role of the inclusive education coach working within an ongoing, successful district-wide systems change endeavor at the classroom, school, district, and state levels designed to: (a) move students with extensive support needs (ESN) from segregated self-contained classrooms and schools to regular education classes, (b) increase the use of evidence-based practices to provide access to the general education curriculum for the students with ESN, (c) increase student academic and social engagement in regular education contexts, and (d) improve student outcomes in the general education curriculum. The researcher engaged in the constant comparison of eleven interview transcripts, field notes written over six days of shadowing the district inclusive education coach, and a review of documents provided by the coach to answer the following research question:

> What is the role of a district inclusive education coach in facilitating sustainable systemic change at classroom, school, district, and state levels designed to increase the inclusion of students with extensive support needs in regular education classes?

This chapter begins with a summary of the preliminary theory that emerged from this study. The chapter next includes a discussion about how this district's systemic change endeavor aligns with the literature regarding the use of implementation science and coaching, and about how the preliminary theory aligns with and adds to the current literature about the use of coaching in systemic change to include students with disabilities in regular education classes. It

concludes with principle implications, implications for further practice and research, limitations of the study, and a conclusion.

A Summary of the Preliminary Theory

The preliminary theory that emerged from this study identified "Understanding the Context" and "Building Capacity" as two co-occurring themes that were the foundation for all of the coach's actions. These actions comprised the coach's use of eight concurrent strategies that allowed him to both understand the context and build capacity at the classroom, school, district, and state levels of the education system to accomplish the district's primary goal of increasing access to the general education curriculum for students with ESN. The coach worked toward this goal by increasing the membership, participation, and learning (MPL) of students with ESN in regular education classes. These concurrent strategies included:

- using tools;
- reflecting on the strengths, needs, and outcomes of students and stakeholders;
- supporting and encouraging stakeholders;
- facilitating access to the general education curriculum for students with ESN;
- changing mindset;
- de-siloing general and special education;
- collaborating; and
- providing resources and professional development.

Alignment of Literature on Implementation Science and the Role of a District Coach

The participating school district involved in the systemic change worked through the four stages of implementation (i.e., exploration, installation, initial implementation, and full implementation) that are aligned with the phases described in implementation science literature, such as Fixsen and Blase (2016) and Blasé et al. (2015). The state and district worked closely

with the TIES National Technical Assistance Center (TIES Center) during the first four years of the change endeavor. During the exploration stage, the TIES Center assisted in forming leadership teams at the state and district levels (Blase et al., 2015), using data and research to identify their needs and available resources, and developing a long-term plan for systemic change (Fixsen et al., 2005). This use of external coaching aligns with 10 of the 11 studies in the literature that focused on including students with disabilities in regular education classes.

During the installation stage, the district hired two inclusive education coaches. One was hired from within the district but left the position halfway through the year, and the other was hired from outside the district and was the primary participant in this study. This step in the systemic change process evidenced the district's belief in the coach as a vital competency driver to affect the desired changes in staff competency and confidence (Fixsen et al., 2013). Using internal coaches aligns with three of the 11 studies focusing on including students with disabilities in regular classes. Bennett et al. (2021) used only internal coaches, and the combined use of internal and external coaches aligns with the other two studies in the literature review (Israel et al., 2022; Ryndak et al., 2007).

The TIES Center continued working with the state and district during the installation stage throughout the second year. Also, technical assistance providers from the TIES Center began working with the coach, providing any necessary training and continued support to develop and maintain the skills he needed to facilitate change (Blase et al., 2015). The coach initially met with the technical assistance provider for three or four days during a single week each month, providing time for,

> problem-solving…brainstorming, and pushing him to think beyond one student, one class, one school to move to the bigger picture district things…That was where the

> technical assistance came in a lot for him because he had a lot of that hands-on stuff already, and he could already pretty much assess a situation, but it was that larger capacity building [where he needed additional support].

The coach collaborated with the technical assistance provider and the district to develop protocols, for example, procedures for scaling up at the district level, and when and how to hire and mentor new coaches.

Over the next two years, the TIES Center remained involved by continuing to meet with the coach monthly, however, these meetings involved fewer in-person days and an increased use of virtual platforms (e.g., email, phone calls, texts, and Zoom). The coach was provided with continuous embedded professional development that faded over time as he built his own capacity to facilitate change throughout the district. District-level personnel also interacted with the coach and the technical assistance provider, reviewing outcomes, problem-solving, and developing new protocols for including students with ESN in regular education classes. The district moved from the initial implementation stage to reaching full implementation within certain schools that worked directly with the coach, as including students with ESN became the new norm (Blase et al., 2015). At the same time, the coach began the initial implementation stage at additional schools based on the district's action plan. Through the documented completion of district and school actions, there have been consistent increases in student membership, participation, and learning for students with ESN and their grade-level classmates.

By the fifth year, the TIES Center was no longer involved. The district had advanced the systemic change endeavor to include eight elementary and middle schools, with plans to include six more schools during year six, including high schools. The district hired two new coaches, which alleviated the concern found in other studies regarding the ability to sustain changes

without the continued support of the external coaches. Additionally, the district shared its plans to hire two additional coaches in the near future as the number of schools participating in the systemic change endeavor increases.

These future plans of the district exemplify the success of the systemic change endeavor for this district, which employed the use of both internal and external coaching resources. More schools were participating in the change endeavor and including students with ESN. Other signs of success included the demonstration of proficiency of all the students in participating schools who took the alternate assessment for science at the end of the fourth year. Additionally, students with ESN were showing signs of having improved quality of life by having friendships with their peers without IEPs and securing paying jobs in the community.

Albers et al. (2020) describe a particular set of qualities a coach requires. These qualities include a professional background, knowledge, and skills, as well as a positive attitude that promotes trusting relationships for effective implementation outcomes. The coach in this study had an extensive professional background with over 20 years working in education in multiple capacities related to meeting the learning needs of students with and without disabilities. He believed in the benefits of inclusive education and had experience as a coach assisting with increasing the inclusion of students with disabilities in regular education classes. He could lead change through non-judgmental communication (Ward et al., 2018), flexibility, consistency, and a commitment to the change process, which align with the reviewed literature (Albers et al., 2020; Lane et al., 2023).

Additionally, this study explains how the coach used his unique qualities, experiences, and knowledge to implement the eight concurrent strategies successfully. For example, his experience with collaborating and facilitating collaboration assisted him in de-siloing general

and special educators; his ability to listen without judgment assisted him in building trusting relationships that enabled changes in mindsets; and his ability to respond in non-directive and non-judgmental ways allowed him to reflect on strengths, needs, and outcomes. This led to his recognition of incremental changes, which he celebrated to support those doing the work. The coach not only possessed these qualities but modeled their use for other stakeholders throughout the system

The combination of external (TIES Center) and internal coaching mechanisms was a major component of the successful implementation of change in this district, along with the state and district's adherence to the phases of implementation science. These would be important considerations for states and districts that want to embark on similar systemic change endeavors to include students with disabilities in regular education classes. Additionally, it would be beneficial for those considering internal coaches to carefully consider the coach's experiences, skills, knowledge, and commitment to the desired changes to enhance their success.

How the Theory Aligns with Current Literature

The following section describes how the two themes identified in the preliminary theory that emerged from this study (i.e., understanding the context and building capacity) align with the reviewed literature. This is followed by a section that describes how the eight concurrent strategies used by the coach align with the strategies used by internal and external coaches within the reviewed literature.

Theme #1: Understanding the Context

The literature about implementation science describes context as part of determinate frameworks for systemic change, that is, multiple aspects of the context (e.g., organizational structures and available resources) determine implementation outcomes. According to Nilsen and

Bernhardsson (2019), most of the 17 frameworks analyzed in their study did not use the term "context" and only defined context indirectly. As an example of this finding, Bennett et al. (2021) reported that the context in which coaching is developed and implemented is crucial for effective outcomes. However, they do not elaborate on how or why that understanding is crucial for the inclusion coach to work effectively with individual stakeholders.

For this study, the coach needed to understand the context of multiple environments across multiple levels. He accomplished this by being cognizant of the changing activities, expectations, reactions, and interactions involving students and stakeholders at the classroom, school, district, and state levels. The coach used this understanding to decide what strategies and approaches to use with different stakeholders across the district, which gave him a deeper understanding of the context at each level. As the coach engaged in the concurrent strategies, the aspects within each context evolved over time.

This idea is mirrored by Albers et al. (2020) when they described how an implementation support practitioner (i.e., coach) must select and apply appropriate strategies, tools, or other measures and adjust these to fit the different "contexts, populations, and settings" (p. 6). Even though Albers and her colleagues were writing about implementation support practitioners in the health field, the same might be applied to practitioners in the education field. The coach cannot ascertain appropriate interventions without thoroughly understanding the context in which they work.

Fixen et al. (2005) stated that a coach needs to teach and reinforce implementation practices and assist the stakeholders in working through any difficulties they might face while navigating and mastering new skills or protocols. The coach cannot provide the appropriate support without a thorough understanding of the context in which the stakeholders are

navigating. Strieker et al. (2012) noted this understanding of context when they described how an inclusion consultant who understood the context of the local community could quickly form trusting relationships with school-level stakeholders. This led to facilitating changes that increased the inclusion of students with disabilities.

In contrast, Israel et al. (2020) reported that coaches found it challenging to support teachers' development of inclusive practices in computer science because of the different individual contexts of each classroom setting. When coaches had difficulty understanding the classroom context, they were less effective in their role. Therefore, based on the extant literature and the findings of this case study, understanding the context and its evolution is crucial for the coach to facilitate systemic change.

Theme #2: Building Capacity

According to Albers et al. (2020), an implementation support practitioner (i.e., coach) is responsible for building the capacity of practitioners (i.e., leadership and staff) involved in systemic change to effectively implement targeted practices, policies, and programs (p. 3). In the education field, this also can pertain to building students' capacity (e.g., increasing participation in the general education curriculum). For this research, building capacity was defined as the coach improving students' and stakeholders' understanding, abilities, skills, practices, interactions, or outcomes across multiple levels for the systemic change process to reach full implementation, leading to sustainability.

In their study of systemic change at the district level for the inclusion of students with disabilities in regular education classes, Bennett et al. (2021) reported that educators credited the inclusion coach with building their capacity to include those students successfully, as well as their sense of competence in doing so. Ryndak et al. (2007) described how the external critical

friends (i.e., a technical assistance network and university faculty) involved in a district-wide systemic change effort assisted in building the capacity of school-level stakeholders to educate students with disabilities in their neighborhood schools. Finally, Strieker et al. (2012) describe an action plan from one school within their study as having a goal to build the capacity of the general and special education teachers to co-teach to increase the inclusion of students with disabilities in regular education classrooms. Based on the extant literature and the findings from this study, both internal and external coaches need to build the capacity of stakeholders in order to achieve sustainable systemic change.

Concurrent Strategies

The eleven studies reviewed for this study, which focused on systemic change involving the inclusion of students with disabilities into regular education classes, described similar strategies used by internal and external coaches. For instance, coaches used tools specific to the focus of the change effort (e.g., UDL, RtI) or for district action planning, but these lacked detailed descriptions.

In four of the 11 studies, reflection was part of the collaboration process between the coaches and the stakeholders, but only two mentioned the importance of the coach reflecting on the strengths, needs, and outcomes of stakeholders to plan their next actions (Bennett et al., 2021; Lane et al., 2023). Bennett et al. (2021) considered the coach's ability to see from the teacher's perspective the "cornerstone of success" and noted further the importance of self-reflection (p. 113). Specific references to reflecting on student outcomes were not explicitly stated.

Most of the studies (n = 9) noted supporting and encouraging stakeholders. Support was described as a major part of embedded coaching that increased stakeholders' capacity and

encouraged them to use inclusive practices more readily within their classrooms. Ryndak et al. (2007) included the notion of celebrating successes. Israel et al. (2022) noted that support and encouragement combined with professional development from the coach increased stakeholders' confidence and led to accessible instruction for all students.

Within the literature that focused on including students with disabilities in regular education classes, all 11 studies reported that access to the general education curriculum was required. Several noted that this accessibility had positive outcomes for students with disabilities. However, few studies described how the coach facilitated that access. Streiker et al. (2012) described the coach as facilitating content area planning and assisting general and special educators in co-planning activities. Lane et al. (2023) described the coach facilitating the use of differentiation through accommodations such as providing large print, extra time, and visuals, as well as differentiating quizzes to meet students' individual needs while ensuring the students with disabilities were working on the same content as their classmates without IEPs. Finally, Cunningham et al. (2017) described using Universal Design for Learning to increase access of students with disabilities in regular education computer science classrooms.

Within the literature focused on inclusive systemic change, there was prevalent discussion about changing stakeholders' mindsets, which was often described as increasing buy-in to the change effort. Without a change in mindset, stakeholders remained resistant to change (Cunningham et al., 2017), and administrator buy-in was described as an important antecedent to the buy-in of other stakeholders (Lane et al., 2023). The coach was recognized as the catalyst for changing the mindset of stakeholders by asking questions (Bennett et al., 2021), providing a safe place for them to examine both their values and beliefs (Israel et al., 2022; Strieker et al., 2012), and how their beliefs affect their willingness to adjust their instructional practices (Lane et al.,

2023). Ryndak et al. (2007) emphasized the importance of the coach knowing the degree to which each stakeholder accepted the change endeavor to advance the change across the system. Additionally, the change in mindset occurred over time (Bennett et al., 2021) and increased as stakeholders experienced success (Cunningham et al., 2017).

The term de-siloing is described as an important aspect of implementation science and systemic change, but it was not explicitly referenced in the literature examined for this study. However, seven of the 11 studies emphasized general and special educators working together on collaborative teams at district or school levels or learning to effectively co-plan and co-teach. The coach was explicitly acknowledged as an influential change agent for building trusting relationships between general and special educators.

Collaborating was considered by Streiker et al. (2012) to be one of the coach's main responsibilities. The reasons provided for the coach engaging in collaboration included problem-solving, planning, accessibility, developing school improvement plans, and student transitions. The coach was often described as collaborating with general and special education teachers, though Israel et al. (2022) described coaches collaborating with one another. Ryndak et al. (2007) further reported the coach collaborating with school and district personnel, and Welch (2018) added the coach facilitating collaboration between faculty. Lane et al. (2023) reported using different collaborative structures, but these were not detailed.

Finally, providing professional development and resources was a strategy that aligned with 10 of the 11 reviewed studies. Topics for professional development included co-teaching, behavior management, differentiated instruction, student-centered learning, and Universal Design for Learning. Studies that mentioned resources provided by the coach described using math manipulatives, physical resources, and supports for student use of assistive technology.

Several studies described the coach as providing professional development and resources but did not elaborate further.

How the Theory Adds to the Current Literature

Membership, Participation, and Learning

Membership, participation, and learning are discussed in the literature about including students with disabilities in regular education classes (Jorgensen et al., 2010; McSheehan et al., 2009). However, although the literature about systemic change for inclusion considers learning for students and practitioners, it does not include discussion about increasing the membership and participation of the students. The district in this study was committed to including students with disabilities by moving students from segregated self-contained classrooms and schools to regular education classes, increasing the use of evidence-based practices, increasing student academic and social engagement, and improving student outcomes; it was the coach, however, who guided the focus on increasing membership, participation, and learning.

The coach understood that without full membership in regular education classes and activities along with opportunities to participate, learning would not occur. His utilization of the MPL indicators provided a way for him to understand the context and build the capacity of stakeholders at the classroom, school, and district levels. They provided a way for education teams to collect data on these necessary components of inclusion; develop action plans to increase the students' membership, participation, and learning; and reflect on the effectiveness of the strategies used. The data collected on the MPL indicators provided a means for stakeholders at every system level to measure the success of the change endeavor and provided a guide for taking the next right actions.

Understanding the Context and Building Capacity

The literature on implementation science and the use of coaching to increase the inclusion of students with disabilities in regular education classes maintains that the context plays a crucial role in determining the outcomes of the systemic change efforts and that building the capacity of stakeholders is required for the changes to be sustained. The extant literature, however, does not explain how the coach engages in understanding the context and building capacity both cyclically and, at times, simultaneously.

This study begins to illuminate how the coach uses concurrent strategies to address both understanding context and building capacity at the same time. Additionally, the theory highlights how the coach addresses these across multiple levels to ensure the entire system is engaged in the change endeavor. To understand the context at multiple levels, the coach must be continuously mindful of how the contexts at each level evolve during the change process. The coach in this study constantly reflected on the changing culture of the district and individual schools; changing mindsets (i.e., beliefs, biases, or fears) of the stakeholders across levels; provision of accessibility to students; and degree to which each student experiences membership, participates, and learns in their regular education classes. Additionally, the findings of this study detail how the coach builds the capacity of stakeholders at each level of the system, including the student level, through using those concurrent strategies. It also details how those strategies are adjusted based on the individual strengths and needs of each stakeholder or group of stakeholders within each separate and evolving context.

Concurrent Strategies

All eight strategies that were identified in this study can be found in the extant literature. Some are found within the literature on implementation science, coaching, and/or coaching in

systemic change for inclusion. However, the literature does not describe a coach using all eight of these strategies, nor does it describe the idea that these strategies are utilized concurrently to assist the coach in both understanding the context and building capacity across multiple levels at once (i.e., classroom, school, district, and state). Therefore, this study exemplifies the simultaneous use of these familiar strategies in a way not previously described in the literature.

Additionally, the current study provides in-depth descriptions of each strategy that are not found in the extant literature, and it describes how the coach utilizes each strategy to understand the context and build capacity across and within levels of the education system. For instance, no two classroom contexts are the same; no two school cultures are the same; and no two students, two educators, two administrators, etc., are the same. This study exemplifies how the coach engages with multiple stakeholders within multiple contexts at multiple levels while remaining cognizant of the cultures, interactions, mindsets, and changes evolving at different speeds; and remaining flexible, approachable, welcoming, non-judgmental, and non-directive.

Principle Implications

Beyond supporting the preliminary theory, four principal implications are derived from this study. First, interpersonal processes were used by the coach and others to advance systemic change within the district. The coach in this study possessed specific qualities that enabled him to build trusting relationships while facilitating successful, sustainable change within this district. In addition to his vast knowledge, skills, and experience, he was approachable, welcoming, non-judgmental, and non-directive. It was clear from shadowing the coach and speaking with the participants in this study that he followed his own advice when he explained how a coach must interact with stakeholders. He stated that coaches must:

> Ask a lot of questions. Guide people, don't tell people…You go in with your ears open, your eyes open, and your mouth shut…OBSERVE what's going on first… SEE the work…HEAR from others, and if you're going to ask questions, ask them what they're doing, or why they're doing what they're doing so that you don't come in sounding like you're the expert… Learn from them.

The technical assistance providers and district personnel demonstrated the same non-judgmental and non-directive interpersonal processes. When the technical assistance provider was asked how she supported the coach, she responded that she engaged in collaborative brainstorming and problem-solving with the coach, and asked questions to help him "think beyond one student, one class, and one school to move to the bigger district picture." Even though the technical assistance provider had the skills, experience, and knowledge to understand exactly what the coach needed to do, she guided him through conversations and questioning strategies. Similarly, the district personnel described how technical assistance providers from the TIES Center guided them and listened to their input as they prioritized their needs for developing their long-range goals. Additionally, the district's inclusive education coach and the newly hired coaches described receiving the same supportive guidance from district personnel.

Second, the coach worked as part of a growing interwoven system-wide team. Nothing about the district's change process occurred in isolation. When considering his past four years of coaching within the district, the coach reflected that "Watching the work that was done at the state level, and watching the work that was done at the district level, really helped me to see all the different parts that go into changing a whole system."

The coach engaged in concurrent strategies to understand multiple contexts and build the capacity at multiple levels at once. But the coach did not work in a vacuum. State and district

teams engaged in long-range planning, and district personnel supported and assisted the coach and other school-level stakeholders. At the school level, there were administrators and school level teams engaged in planning and supporting systemic change at their individual schools, as well as education teams building their capacity to take on leadership roles. The coach was described as connecting the TIES Center, state, district, schools, and classrooms. However, without all these teams and individuals engaged in the process, the coach could not do his job, regardless of his capability. As described by one participant, "It's such an interwoven process to do systems change." The coach understood and worked within the interwoven system-wide team processes.

Third, there is a required understanding that change will take time and could appear messy at times. The systemic change was gradual, and stakeholders in leadership roles seemed to have a prerequisite understanding of this. One of the district personnel reflected on how some individuals at the school level initially responded to the coach, saying, "I have had people who first meet [the coach] and say, 'He's not doing anything!' [LAUGHING] And then, having known him for two years, they will be like, 'Oh my gosh! He was amazing!' The same person!"

This quote exemplifies two separate but equally important concepts. First, the understanding that the coach was not expected to go into schools and tell people what to do or do things for them. Second, it would take time to build stakeholders' capacity to understand the "why" and "how" of increasing the membership, participation, and learning of students with ESN in their classrooms and begin to experience success in their students and in their own newly acquired skills. As stakeholders work to build their own capacity, the process can seem messy, and people might not feel confident in the beginning stages of the change process. The coach and

others in leadership roles understood the time required for systemic change to occur and were patient with stakeholders as the process unfolded.

Finally, schools and districts that use coaches to support systemic change that facilitates inclusive education would be prudent to consider limiting their roles to coaching rather than asking coaches to juggle multiple roles at once. The coach in this study had worked in a previous district undertaking a similar change endeavor to include students with ESN in regular education classes. While at that other district, he was expected to complete his responsibilities as the district's assistive technology specialist and the inclusive education coach. Although he was a designated district inclusive education coach during this study, he spoke in relation to both his current position and his experience of juggling two roles (i.e., district coach and assistive technology specialist) simultaneously in his previous position. When asked what advice he would give to other districts involved in inclusive systemic change he replied, "I think for districts, having designated coaches really makes a difference."

The district in this study received four years of support from the TIES Center to assist in planning and achieving its prioritized goals. Unlike most of the literature reviewed for this study, it decided to hire internal coaches while engaging with external coaches to build the capacity of their internal coaches. The coach's belief in the value of coaches with single designated roles and the district's engagement with external coaches are consistent with Fullan and Knight (2011), who stated, "Coaches are system leaders. They need development as change agents at both the instructional level and the level of organizational and system change. It's time to recast their role as integral to whole-system reform" (p. 53).

Implications for Future Practice and Research

The research is clear regarding the benefits of inclusive education for students with ESN. To increase the inclusion of students with ESN in regular education classes, the district in this study worked successfully for four years with the TIES Center as an external technical assistance provider that assisted them in embarking on a systemic change endeavor. The first year was spent evaluating current practices, prioritizing goals for changing those practices and developing clear messaging and expectations for working through the four stages of implementation. Additionally, this district employed internal inclusive education coaches who focused on meeting the district's goals through work among and across all levels of the education system.

Two studies from the literature review evaluated the sustainability of systemic change efforts to include students with disabilities in regular education classes. The study by Ryndak et al. (2007) determined that the district's systemic changes were sustained two years after the culmination of five years of coaching by external technical assistance providers. In its second year, the district in this study also hired an internal coach who worked with the external coaches. One recommendation from the authors of this study is for districts involved in similar systemic change endeavors to ensure there is a person (i.e., an internal coach) working within the district who is capable of coordinating, facilitating, supporting, and monitoring the change efforts across all levels of the system along with the initial assistance of the external coaches.

Conversely, the study by Sindelar et al. (2006) determined that the systemic changes at a school level were not sustained four years after the culmination of six years of coaching by external technical assistance providers. The reasons for the lack of sustainability focused on staff and administration turnover and the emergence of high-stakes state testing. However, this change endeavor did not include an internal coach.

When states or districts make the decision to include students with disabilities in regular education classes, they must recognize that it will require a substantial time commitment that must begin with a clear understanding of the reasons for embarking on the systemic change endeavor, an allowance of ample time to plan before actions are taken, and an anticipation of a minimum of a five-to-seven year process to achieve their goals. They will need to consider the use of internal and/or external coaches, as well as the combination of coaching strategies that would best meet their system's needs. If a state or district decides to employ internal coaches, they must consider the coach's knowledge, skills, experiences, and ability to build trusting relationships to guide stakeholders through the change process at multiple levels simultaneously.

According to Gomez-Najarro et al. (2023), the number of programs offering dual certification in general and special education is on the rise in the United States. However, in their review of 721 colleges and university programs offering dual certification, they found that only one-fourth described their programs in terms of equity, inclusion, and collaboration across disciplines (Gomez-Najarro et al., 2023). Additionally, there has been an international push toward the practice of dual certification (M. Chitiyo, personal communication, May 24, 2024).

Institutions of higher education that prepare future educators might consider offering purposeful and reformative dual certification options or at least provide collaborative opportunities between pre-service general and special educators. This would assist in preparing educators for the inclusion of students with disabilities, including those with ESN, into regular education classrooms. Additionally, it would be a positive step in the de-siloing of general and special education programs and personnel in higher education and K-12 public education. The coach would then have one less hurdle to overcome in the process of increasing the membership, participation, and learning of all students within regular education classrooms.

The implementation science literature recognizes the coach as a valuable competency driver (Fixsen et al., 2013, p. 222), whose purpose is to build the capacity of practitioners involved in the systemic change process. Most of the literature focusing on change efforts to include students with disabilities utilized external coaches (n = 10). Of these 10, two used both internal and external coaches (Israel et al., 2022; Ryndak et al., 2007), as did the district in this study, and one used only internal coaches (Bennett et al., 2021). However, only the studies by Bennett et al. (2021) and Ryndak et al. (2007) focused exclusively on including students with disabilities.

Future research is needed to explore the role of an internal coach within state and district-wide initiatives to increase the inclusion of students with disabilities in regular education classes. Additional research studies might further assist systems that are exploring the use of internal coaches for this type of systemic change endeavor and add to the preliminary theory developed in this study. Researchers could also compare a combination of internal and external coaches to determine which coaching structures lead to sustainability while providing the best possible outcomes for students. This research is particularly important since one of the barriers to sustainability when using only external coaching was the lack of support for practitioners after the external coaches no longer worked within the schools or districts. Additionally, researchers might consider using multiple case study designs that would allow for comparisons of coaching practices across various education systems.

Limitations of the Study

One limitation of this study is that it is an interpretation of the systemic change endeavor of a single district. This study only describes the role of a single district inclusive education coach within that single bounded system. The constructed theory and interpretation of these data

are specific to this case and cannot be generalized to districts embarking on the same systemic change to include students with ESN in regular education classes through the use of internal and external coaching to support the change endeavor. However, this information might be helpful to a district with similar variables such as size, urbanicity, culture, and climate. Additionally, the district in this study is part of a state-wide endeavor that began with the planning and support of a national technical assistance center. Another district might not have that support available at the onset of a similar systemic change endeavor.

The researcher completed the coding of the interview data for this study, and a second researcher contributed to the trustworthiness of the analysis by co-coding 25% of the interviews and ongoing discussions about emerging codes and theory development. A limitation of this study is that only one researcher participated in shadowing with field notes despite trying to schedule time for the second researcher to participate in any of the six shadowing days. This could be considered a limitation in the reliability of the data collected during the shadowing processes (Yin, 2018).

It is typical when using grounded theory for the researcher to collect data through theoretical sampling based on the data codes and categories. As previously mentioned, theoretical sampling is challenging in a single case study (Urquhart, 2023). Therefore, the participants in this study were chosen based on a combination of purposeful and convenience sampling. Additionally, for this study, the researcher conducted two phases of shadowing with field notes. This protocol had been pre-determined and based on the time constraints of the study. However, a third phase of shadowing with field notes might have allowed further saturation of the codes, the pursuit of unsaturated codes to provide more depth, or the expansion of the theory (Urquhart, 2023).

Finally, within grounded theory, documents are used to support the developing theory. For this study, each aspect of the theory was substantiated by the documents provided by the coach. However, the available documents were limited by what the coach was willing to share. In some cases, documents required a separate owner to grant access and were therefore inaccessible to the researcher except for the document title. Future researchers might consider requesting documents from other participants in the study to corroborate their developing theory further.

Conclusion

Conceptualizing the role of a coach engaged in systemic change for including students with expensive support needs in regular education classes requires an understanding of the coach's skills, knowledge, experiences, and beliefs, and how those align with the system's vision, strategic plan, and commitment. The preliminary theory that emerged from this study illustrates that a coach must understand multiple evolving contexts to build the capacity of stakeholders across multiple system levels to increase the membership, participation, and learning of students. To accomplish this, the coach in this study used specific tools; reflected on the strengths, needs, and outcomes of students and stakeholders; supported and encouraged stakeholders; facilitated access to the general education curriculum for students with ESN; changed mindsets; de-siloed general and special education; collaborated; and provided resources and professional development. As education systems consider changing their policies and practices to include all students in regular education classrooms and activities, using internal coaches might provide a principal link for building capacity and sustainability across and among system levels.

This study illustrates the role of one inclusive education coach within one district engaged in systemic change to include students with ESN in regular education classes. The preliminary theory that emerged from this study provides an expanded understanding of the coach's role within a systemic change endeavor to increase inclusive education opportunities for students with disabilities. Additionally, it aligns with the existing implementation science literature regarding the use of a coach as a valuable competency driver working within a team of people and systems supporting the change process together. Through the work of both the internal and external coaches, this district-wide systemic change effort impacted not only changes in student placement but also changes in mindset for all stakeholders involved in the endeavor and improved student outcomes.

In conclusion, a quote from the district inclusive education coach provides an example of the value he places on all students and his belief that all students are general education students. "All students are our students. We share the wealth."

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APPENDIX A: SEMI-STUCTURED INTERVIEW PROTOCOL – INCLUSIVE EDUCATION COACH

Interview One:

Background Questions

1. Tell me about your background and what brought you to your current position as an inclusive education coach (IEC).

   Follow-up Probes

- Type/level of formal education
- Previous roles in education
- Additional education for your role as IEC
- How has xxx helped with your role as IEC
- How long have you been an IEC

2. Can you tell me why you think you are good at your role as an IEC?

   Follow-up Probes

- Why are these qualities important?
- What qualities have you had to develop?
- What outcomes have you achieved?
- Do you receive feedback about your role from others? Tell me about that.

3. Is there anything else you want to share about yourself or your background?

   Expansion Probes

- Can you give me an example?
- Can you tell me a story about that?
- Can you explain more about that?

Classroom, School, District, State Level Questions

1. Can you talk to me about your role at the **classroom** level?

   Follow-up Probes

- With whom do you work?
- With what frequency and duration?
- Are there differences in your role depending on content areas/grade levels, leadership, school readiness, personnel preparedness?

2. Can you tell me about your goals for working at this level of the system?

   Follow-up Probes

- Can you describe changes in instructional practices you have observed?
- Talk to me about some successes you have observed.
- Can you share any difficulties or issues that you have had to overcome at this level?

3. Can you describe any resources (tools, processes, supports) you use at the

   classroom level?

   Follow-up Probes

- Describe how you measure progress for adults.
- How do you assess outcomes for students?

  Expansion Probes

- What does that look like?
- Can you give an example?
- How does that relate to system change (e.g., capacity building/sustainability)?
- Can you tell me more about xxx?

1. Can you talk to me about your role at the **school** level?

   Follow-up Probes

- With whom do you work?
- With what frequency and duration?

- Are there differences in your role depending on school type (e.g., high, middle elementary), leadership, school readiness, personnel preparedness?

2. Can you tell me about your goals for working at this level of the system?

   Follow-up Probes

- Can you describe changes in practices you have observed at this level?
- Talk to me about some successes you have observed.
- Can you share any difficulties or issues that you have had to overcome at this level?

3. Can you describe any resources (e.g., tools, processes, supports) you use at

   the school level?

   Follow-up Probes

- Describe how you decide on the next steps to further your goal.
- How do you assess outcomes at this level.

  Expansion Probes

- What does that look like?
- Can you give an example?
- How does that relate to system change (e.g., capacity building/sustainability)?
- Can you tell me more about xxx?

1. Can you talk to me about your role at the **district** level?

- Follow-up Probes
- With whom do you work?
- With what frequency and duration?
- Are there differences in your role depending on department type (e.g., special education, curriculum, general education) leadership, district readiness, personnel preparedness?

2. Can you tell me about your goals for working at this level of the system?

   Follow-up Probes

- Can you describe changes in policy or practices you have observed?
- Talk to me about some successes you have observed.

- Can you share any difficulties or issues that you have had to overcome at this level?

3. Can you describe any resources (e.g., tools, processes, supports) you use at

   the district level?

   Follow-up Probes

- Describe how you measure outcomes at this level.

  Expansion Probes

- What does that look like?
- Can you give an example?
- How does that relate to system change (e.g., capacity building/sustainability)?
- Can you tell me more about xxx?

1. Can you talk to me about your role at the **state** level?

   Follow-up Probes

- With whom do you work?
- With what frequency and duration?

2. Can you tell me about your goals for working at this level of the system?

   Follow-up Probes

- Can you describe changes in policy or practices you have observed?
- Talk to me about some successes you have observed.
- Can you share any difficulties or issues that you have had to overcome at this level?

3. Can you describe any resources (tools, processes, supports) you use at the

   district level?

   Follow-up Probes

- Describe how you measure outcomes at this level.
- Is there anything else you want to share about your role as an inclusive education coach?

  Expansion Probes

- What does that look like?
- Can you give an example?
- How does that relate to system change (capacity building/sustainability)?
- Can you tell me more about xxx?

Interview Two/Three:

1. During the recent shadowing experience, I noticed xxx.

   Follow-up Probes

   - Can you talk to me more about that?
   - How did you decide xxx?
   - Can you tell me more about xxx?
   - Can you explain xxx?
2. What were the highlights from your perspective during that shadowing experience?

   Follow-up Probes

   - How will you encourage more xxx?
   - How do you think xxx relates to system change?
   - Tell me about what next steps you will take
3. I found it surprising that xxx.

   Follow-up Probes

   - Can you talk to me more about that?
   - Is there anything you will do differently next time?
   - Is there anything else you would like to share about the past shadowing experience or any other part of your role as an inclusive education coach?

   Expansion Probes

   - What does that look like?
   - Can you give an example?
   - How does that relate to system change (capacity building/sustainability)?
   - Can you tell me more about xxx?

Other questions will be dependent upon the field notes and observations and will be directly related to what I have observed or have questions about relating to the previous shadow experience. Possible topics might include:

Peer supports	*Instructional practices*	*Collaboration*
Accessibility	*Modified assignments*	*Team planning/teaching/ assessing*
AAC	*paraeducators*	

APPENDIX B: SEMI-STRUCTURED INTERVIEW PROTOCOL – OTHER STAFF

Background Questions

1. Tell me about your background and what brought you to your current position with CCPSS/state.

   Follow-up Probes

- Type/level of formal education
- Previous roles in education
- What is your current role?
- How long have you been in your current position?
- Is there anything else you would like to tell me about yourself?

Questions Regarding Inclusive Education Coach

2. How would you describe the role of the inclusive education coach?

   Follow-up Probes

- Can you describe the qualities that make him good at his role?
- What can you tell me about his role in advancing system change?
- Tell me about any resources he uses that you have found particularly useful.
- How often do you work with the inclusive education coach?
- Can you share any difficulties or issues that you have had to overcome within the system change process?

3. *During a recent shadow experience, I noticed/observed xxx

   Follow-up Probes

- Can you tell me more about this?
- How do you think this relates to system change?

  Expansion Probes

- Can you give me an example?
- Can you tell me a story about that?
- Can you explain more about that?

- Can you describe how/what?
  Is there anything else you would like to share about the role of the inclusive education coach or your interactions with them?

  **Other questions will be dependent upon the field notes and observations and will be directly related to what I have observed or have questions about relating to the previous shadow experience. Possible topics might include:*

Peer supports	*Instructional practices*	*Collaboration*
Accessibility	*Modified assignments*	*Team planning/teaching/ assessing*
AAC	*Paraeducators*	