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**Matteson, Jane Franklin**

**THE IDENTIFICATION OF INSERVICE TRAINING NEEDS OF EDUCATORS  
RESULTING FROM THE ENACTMENT OF PUBLIC LAW 94-142**

*The University of North Carolina at Greensboro*

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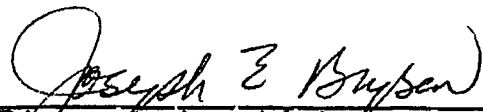
by

Jane Franklin Matteson

A Dissertation submitted to  
the Faculty of the Graduate School at  
The University of North Carolina at Greensboro  
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of the Requirements for the Degree  
Doctor of Education

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APPROVAL PAGE

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The problem of this study was to ascertain the procedures utilized by the North Carolina Public School system to determine inservice training needs of its special educators. A questionnaire was distributed to randomly selected directors of special education.

Based on the data generated by responses to the questionnaires, a number of basic research questions were answered. (1) In fifty-four percent of the districts, inservice training needs are determined mainly by surveys sent to teachers. (2) Directors, and teachers and supervisors to a significant extent, are responsible for insuring that inservice needs are determined and met. (3) Target populations for inservice training are special needs teachers, regular classroom teachers, support personnel, and instructional and administrative personnel. (4) Needs assessments programs helped almost all directors improve their department's ability to plan. (5) Needs assessment programs helped most directors improve their financial management competency. (6) The great majority of the directors felt that their needs assessment procedures improve the quality of inservice training. (7) The types of needs assessment most widely employed included formal

needs assessment surveys distributed to teachers, formal assessment based on discussion with teachers, regular staff meetings with teachers, supervisory meetings, and both oral and written critiques (by teachers) of needs assessment.

The conclusions of this study indicated that the directors of special education sampled felt that their needs assessment programs significantly improved (1) their department's ability to plan needs assessment, (2) their own ability to plan needs assessment, (3) their financial management competence in conducting needs assessment program, and the needs assessment programs offered in their district. It was concluded that (4) while directors of special education regularly rely on teacher, administrator, and support personnel input when constructing needs assessment plans, the tendency is to (5) rely more on survey forms distributed to teachers than on actual direct participation and contribution by teachers at meetings. Over a third of the directors felt (6) the need for more creative approaches to needs assessment, that (7) they were uncertain of their ability to work with the general community, and that (8) they were uncertain about having gained the respect and support of instructional supervisors.



## ACKNOWLEDGMENTS

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## CHAPTER I

## INTRODUCTION

One of the major concerns following enactment of the Education for All Handicapped Children Act of 1975, Public Law 94-142,<sup>1</sup> has been how to meet the training needs of educators who are responsible for carrying out the Act. The requirement to provide handicapped children with an appropriate education in the least restrictive environment has meant that more regular educators are teaching handicapped children in their classrooms, and many have not been trained or do not feel able to work appropriately with handicapped children. The National School Board Association's 1977-78 Task Force on Education of Handicapped Children reported that:

With respect to 'least restrictive environment,' regular classroom teachers were generally regarded as being 'apprehensive' about mainstreaming. This apprehension is based upon a lack of training in special education and a sense of uncertainty is balancing scarce preparation and classroom time between special education students and other students.<sup>2</sup>

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<sup>1</sup>U.S. Congress. Public Law 94-142 (1975).

<sup>2</sup>U.S. Office of Education, Bureau of Education for the Handicapped, The Design, Development, and Implementation of a National Replicable Inservice Training Needs Assessment Project, 1979, p. 14.

Special educators have also expressed a need for help in supplementing the law, particularly in finding the Individualized Education Program (IEP). For many special educators, the implementation of individualized education programming has necessitated changes in the provision of instructional programs and services to handicapped children, and thus, changed the role or job requirements of the special education teacher.

While there is much interest on the part of the Bureau of Education for the Handicapped (BEH), state education agencies, national education organizations, and local education agencies to find ways of meeting training needs of education personnel working with handicapped children, appropriate inservice training cannot be planned and provided unless the specific training needs of these personnel are identified. In addition, training needs must be relevant to both regular and special educators who are interacting with our handicapped children. This would indicate that a collaborative effort is essential in both assessing needs and planning to meet the needs evidenced.

Public school personnel, especially directors of special needs programs, are faced with the task of providing to instructional staff appropriate training relating to the special needs student. To meet these needs, determinations must be made about populations being served, resources

available, and alternative means within the scope of the educational agency to provide training.

The ultimate goal is that quality decisions will be made in the selection of appropriate training. According to Vroom and Yetton, if a rational (quality) solution of a problem is to be obtained, one resource that is most critical to the decision-making process is information--information necessary to the task of evaluating the quality or rationality of different alternatives available to the organization.<sup>3</sup>

Federal legislation enacted in 1975 (Public Law 94-142) mandates the provision of training for special and regular educators serving the special needs student. Public education agencies must now insure that an appropriate staff development plan is in place each year. The plan should result in the education agency's provision of training which speaks to the specific needs of its educators.<sup>4</sup>

In July, 1977, the North Carolina General Assembly adopted Chapter 927, An Act to Provide for a System of Educational Opportunities for All Children Requiring Special Education.<sup>5</sup> Section 115-360 of the General Statutes brings

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<sup>3</sup>Victor Vroom and Phillip Yetton, *Leadership and Decision-Making* (Pittsburgh: University of Pittsburgh Press, 1976), p. 221.

<sup>4</sup>U.S. Department of Health, Education, and Welfare, Office of Education. Federal Register (Washington, D. C., 1977), Sec. 121(a)(1).

<sup>5</sup>North Carolina, State Department of Public Instruction, Equal Educational Opportunities Planning (Raleigh, 1977).

state law, regulations, and practice into conformity with Public Law 94-142. Directors at the local level have the responsibility, as mandated by state law, to submit a comprehensive staff development plan to the state each year prior to the initiation of the school year. In fulfilling its responsibility, the department of Exceptional Children at the local level must make its decisions from information which should include a form of perceived needs assessment submitted to the teaching faculty in order to appropriately speak to their training needs.<sup>6</sup>

In North Carolina, local education decision makers must provide training options to faculty dealing with special needs students despite school district size and incidence figures. Information needed for evaluation of inservice training needs may vary according to staff and student population. Local education agency personnel are now responsible for obtaining inservice needs information, evaluating that information, and planning and providing appropriate training based on those needs.

Changes in law and regulation do not automatically insure altered decision-making behavior. Before appropriate inservice training can be offered, an adequate information base must be available to the decision makers.

A review of the research related to needs assessment for inservice training of educators working with special

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<sup>6</sup>Ibid., p. 68.



needs students follows to determine the information needed and mandated prior to inservice planning.

### Questions to be Answered

The present study was conducted to investigate the information base used to determine inservice training needs for educators as a result of the enactment of Public Law 94-142. Below are listed several key questions relating to the determination of inservice training needs and their development.

1. What means are currently being utilized to determine inservice training needs?
2. Who is primarily responsible for insuring that inservice needs are determined and met?
3. What resources are utilized in determining inservice needs?
4. What are the target populations for inservice training?
5. Has assessing inservice training needs improved the competency of local directors and related personnel in planning?
6. Has assessing inservice training needs improved financial management for local directors?
7. Has the assessment of inservice training needs significantly affected the quality of training provided?
8. What factors or commonalities produce effective needs assessment procedures?

### Scope of the Study

This is an historical study of the identification of inservice training needs of public educators resulting from the enactment of Public Law 94-142. The present dissertation's research describes the extent to which federal, state, and local agencies have developed practices to determine inservice needs for compliance with federal and state legislation.

The study reviews current literature at the federal, state, and local levels regarding the mandate for inservice training. In addition it specifically investigates through a survey of representative local education agencies in North Carolina the means utilized to evaluate the extent of information on which inservice training is based.

### Methods, Procedures, and Sources of Information

The basic research technique of this historical research study was to examine and analyze the available references relating to the identification of inservice training needs resulting from the enactment of Public Law 94-142. Existing documents and records specifically related to education programs for the handicapped used to identify training needs were reviewed. Needs assessment methods utilized through national education organizations, Bureau of Education for the Handicapped projects, state education agencies, and local education agencies were investigated to determine current practices in needs assessment

In order to determine whether a need existed for such research, a search was made of Dissertation Abstracts for related topics. Journal articles related to the topic were located through use of such sources as Reader's Guide to Periodical Literature, Education Index, and the Index to Legal Periodicals.

General research summaries were found in the Encyclopedia of Educational Research, various compendiums on school law, and in a review of related literature obtained through a computer search from the Educational Resources Information Center (ERIC).

Federal and state court cases related to the topic were located through use of the National Reporter System and the American Digest System. Recent court cases were reviewed through Nolpe School Law Reporter and the Handicapped Educational Law Report.

Other supplementary materials related specifically to the topics were received from the Council for Exceptional Children, the United States Office of Education, and the National Inservice Network.

For the purposes of this study, a questionnaire was also utilized to determine how representative school systems in North Carolina determine inservice training needs. This source of information was compiled and analyzed to present research regarding how inservice needs are being identified in North Carolina.

The analysis of this information produced factors or commonalities of successful needs assessment procedures. The resulting study should assist educators at the local level in developing their capacity to conduct needs assessment to provide more effective inservice education programs relating to the educators working with special needs students.

#### Definitions of Terms

Selected terms which are used throughout this study are defined below:

Inservice training. The provision of instruction in the form of staff development, individualized independent study, etc. to certified teachers or personnel who are currently employed or in service.<sup>7</sup>

Least restrictive alternative. Among all alternatives or environments for placement within an educational system, children with special needs receive placement where they can obtain the best educational services which meet their individual educational needs as close to and as nearly like a regular classroom setting as possible.<sup>8</sup>

Local educational agency (LEA). All city and county school administrative units as separate educational services.<sup>9</sup>

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<sup>7</sup>North Carolina State Department of Public Instruction, Comprehensive System of Personnel Development (Raleigh, 1980), p. 37.

<sup>8</sup>Rules Governing Programs and Sources for Children with Special Needs (Raleigh, N. C., 1981), p. 6.

<sup>9</sup>Ibid.

Needs assessment. Any procedure utilized by an agency to determine the needs of its personnel in order to effectively plan for those needs.<sup>10</sup>

Related services. Transportation and such developmental, corrective, and other supportive services as are required to assist a child with special needs to benefit from special education; includes speech pathology and audiology, psychological services, physical and occupational therapy, recreation, early identification and assessment of disabilities in children, counseling services, and medical services for diagnostic or evaluation purposes. The term also includes school health services, social work services, teacher training, and parent counseling and training.<sup>11</sup>

Special education. Specially designed instruction, at no cost to the parent, to meet the unique needs of the exceptional child, including classroom instruction, instruction in physical education, home instruction, and instruction in hospitals and institutions.<sup>12</sup>

Special needs student. This term includes, without limitation, all children who because of permanent or temporary mental, physical, or emotional handicaps need special education, are unable to have all their educational needs met in a regular class without special education or related

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<sup>10</sup>Ibid.

<sup>11</sup>Ibid., p. 28.

<sup>12</sup>Ibid., p. 30.

services, or are unable to be adequately educated in public schools.<sup>13</sup>

State education agency. For purposes of this publication, all state departments of public instruction, specifically their divisions for exceptional children.<sup>14</sup>

#### Significance of Study

In general, the identification of inservice needs is thought to be an early step in the program-planning process.<sup>15</sup> Prior to the 1960s, it was not uncommon for teachers and administrators to establish curricular goals and objectives based on what was considered sound educational theory and experience. These educational goals and objectives were often influenced by local politics and legislation. Many programs were designed to accomplish the stated objectives without systematic consideration given to the unique needs or learning requirements of personnel. During the 1960s, a number of efforts were made to update the "cart before the horse" or to determine specifically what personnel needs existed prior to establishing program objectives and developing components.<sup>16</sup>

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<sup>13</sup>Ibid.

<sup>14</sup>Ibid.

<sup>15</sup>Roger Kaufman, Educational System Planning (Englewood Cliffs, New Jersey: Prentice Hall, 1972), p. 132.

<sup>16</sup>Roger Kaufman and John Harsh, Determining Educational Needs: An Overview (San Francisco: California State Department of Public Instruction, 1969), pp. 16-22.

As a result of early efforts to systematize the determination of inservice needs through a precise process, it became clear that a definition of need was necessary in order to provide direction and meaning to subsequent assessment procedures. Two general definitions were popularized during the late 1960s and early 1970s.

In the first definition, referred to as democratic, "need" was thought to be a change desired by a majority of some reference group. In this approach a group of experts or representatives from interested constituencies would determine what needs existed. One of the problems associated with this approach is that it is inappropriate in most instances to permit some group to ultimately determine needs without first applying some consensually validated criteria. However, the involvement of various constituencies in the needs assessment process is essential for the successful determination of needs.<sup>17</sup>

Another problem associated with this and other needs assessment approaches is making certain that the process correctly distinguishes needs from wants. Assurances are essential in determining that need does not merely reflect changes that are preferred or demanded for various reasons. Some

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<sup>17</sup>George Kuh et al., Designing a Problem-Focused Needs Assessment. National Inservice Network Monograph (Bloomington, Indiana: National Inservice Network, 1979), p. 48.

wants, preferences, or demands may actually reflect need. However, wants do not necessarily represent needs.<sup>18</sup>

The second definition employed in needs assessment efforts, usually referred to as discrepancy, has been used in the majority of needs assessment efforts, prior to the mid-1970s. In this approach, need is defined as the discrepancy or difference between an individual's or group's present state of functioning or performance level and the ideal or acceptable level of functioning or performance.<sup>19</sup> In other words, needs are thought to be shortfalls in educational outcomes or results.

This method of assessing needs became quite popular, due largely to its basic simplicity and the apparent congruence between this method and the goals and objective outcome sequence which has characterized education during much of the past decade. While the relative clarity of this approach is attractive, the discrepancy of needs assessment has the potential to distort the validity, and therefore the usefulness of the results.

According to Davis, Kuh, Mann, and Walker another persistent problem associated with application of the discrepancy definition concerns the degree to which the desired states or levels of performance

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<sup>18</sup>Ibid., p. 52.

<sup>19</sup>Kaufman, Educational System Planning, p. 128.



can be accurately described.<sup>20</sup> In many instances, the desired or ideal state (e.g., teacher's knowledge about handicapped children) is difficult and sometimes impossible to describe. Another important consideration not accounted for by the discrepancy approach is level of necessity as contrasted with level of performance that exceeds minimal requirements for satisfactory performance.

Because of the problems associated with past needs assessment definitions, a number of theorists have dealt recently with the issues related to defining need. As a result of their work, several more precise definitions of need have emerged. For example:

Need is a factor or element without which a person cannot function satisfactorily.<sup>21</sup>

Need is something that can be shown to be necessary or useful for the fulfillment of some defensible purpose.<sup>22</sup>

Need is a necessary or desirable condition, state, or situation . . . whether it be an end result that is actuality (met need) or a discrepancy that must be closed between a current or projected actuality and a necessary or highly

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<sup>20</sup>Sharon Davis et al., Exceptional Child Education Report: Needs Assessment for Inservice Education (Reston, Virginia: Council for Exceptional Children, 1980), p. 14.

<sup>21</sup>Michael Scriven and James Roth, "Needs Assessment: Concept and Practice," in Exploring Purposes and Dimensions, eds. George Adderson and Charles Coles (San Francisco: Jossey-Bass, 1978), p. 214.

<sup>22</sup>Daniel Stufflebeam, "Needs Assessment in Education," paper presented at American Educational Research Association Evaluation Conference, San Francisco, September 1977.

desirable end result (unmet need) . . . as judged by a relevant person or group using multiple objective criteria that have been previously agreed upon.<sup>23</sup>

It is evident that "need" is an often used but generally misunderstood concept. This is true within the education profession as well as society in general. The processes through which need can be identified are being more clearly articulated. However, it is urgent that procedures used to document whether need exists and the most appropriate forms of needs assessment processes and their utilization must be established. These shortcomings have been accentuated recently by the mandates associated with the passage of Public Law 94-142. The expectation that children with special needs should and could be educated in regular classrooms has further demonstrated the importance of being able to accurately identify the needs of teachers. If needs can be documented, the likelihood is increased that inservice training experiences can be provided to meet those needs.

Thus this study is significant in that it provides educational decision-makers with a comprehensive analysis of the identification of inservice training needs relating to the enactment of Public Law 94-142. This study provides educational leaders with guidelines for the determination of

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<sup>23</sup>John Lensing, "Changing Public Policies: Roots and Forces," Mainstream: Origins and Implications, ed. Michael Reynolds (Reston, Virginia: Council for Exceptional Children, 1980), p. 82.

inservice training needs in order to better prepare teachers to work with the special needs student.

#### Status of Determining Inservice Training Needs

The significance of this study can be accentuated by analyzing the scope of determining inservice training needs in the public schools. A review of recent studies relating to the successful implementation of Public Law 94-142-- especially those components that relate to individualized education programming, placement in the least restrictive environment, and procedural safeguards--reveals that coordinated and intensive inservice efforts are required. Federal regulations for Public Law 94-142 detail state and local education agency responsibility for developing a "Comprehensive System of Personnel Development."<sup>24</sup> The purpose of such a system is to provide ongoing inservice training programs to assist all special and general educators in implementing the provisions of the law.

Under this federal regulation, each state education agency has the responsibility for ensuring the opportunity for all interested groups to participate in the development, review, and annual updating of the plan. This state agency plan should describe procedures for the development and implementation of a Comprehensive System of Personnel Development which includes:

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<sup>24</sup>U.S. Congress. Public Law 94-142, sec. 121(a) 380-387 (1975).

1. Needs assessment to determine inservice and pre-service training needs.
2. The inservice and preservice training of general and special education personnel.
3. Procedures for ensuring that all personnel are qualified.
4. Effective procedures for acquiring and disseminating significant information derived from educational research, demonstration, and similar projects, and for adopting, where appropriate, promising educational practices and materials.<sup>25</sup>

Each local educational agency has the responsibility for developing a local education agency application under Public Law 94-142 which must include procedures for the implementation and use of the Comprehensive System of Personnel Development established and described in the state's Annual Program Plan.

Therefore, all states receiving federal funds under Public Law 94-142 are currently utilizing some means of needs assessment to determine inservice training needs. Meyers stated that there is a considerable range in approach and quality of needs assessments utilized.<sup>26</sup>

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<sup>25</sup> Ibid.

<sup>26</sup> Barbara Meyers, "Modification of Teachers' Attitudes Towards Exceptional Children," Exceptional Children 38 (Spring 1978): 259-260.

The majority of states, according to Davis, do utilize more than one method to determine inservice training needs.<sup>27</sup> However, few states describe their needs assessment procedures in detail.

### Design of the Study

The remainder of the study is divided into three major parts. Chapter Two contains a review of related literature. In addition to the literature dealing specifically with the determination of inservice training needs, this section includes a summary review of several national model programs for the identification of inservice training needs.

The third chapter deals with the methodology and analysis of identifying inservice training needs in North Carolina. For the purposes of this study a random sample of statewide local education agencies' methods of needs assessment are investigated and analyzed.

Chapter Four contains a general listing and discussion of effective guidelines for the determination of inservice training needs. It will also present a summary of information obtained from the review of the literature and the analyses of state and nation needs assessment methods. Chapter Five presents conclusions and recommendations.

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<sup>27</sup> Sharon Davis, A Review of Selected Inservice Training Components of States' 1979 Annual Program Plans (Reston, Virginia: Council for Exceptional Children, 1980), p. 12.

## CHAPTER II

## REVIEW OF THE LITERATURE

A Review of Federal Legislation Relating  
to the Special Needs Child

The first major items of legislation requiring states to establish goals to provide full educational opportunities for all handicapped children were the Education Amendments of 1974.<sup>1</sup> This bill made provisions for the procedural safeguards for the identification, evaluation, placement, and delivery of service to special needs children. An additional purpose of the legislation was the provision of programs for special needs students in the least restrictive alternative setting. The law established that states would adopt:

B. Procedures to insure that, to the maximum extent appropriate, handicapped children, including children in public or private institutions or other care facilities, are educated with children who are not handicapped, and special classes, separate schooling, or other removal of handicapped children from the regular education environment occurs only when the nature or severity of the handicap is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.<sup>2</sup>

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<sup>1</sup>U.S. Congress. Public Law 93-380 (1974).

<sup>2</sup>Ibid., Sec. 612(d)(13B).

President Gerald Ford, on November 29, 1975, signed into law the federal Education for All Handicapped Children Act, amendments to Public Law 93-380.<sup>3</sup> Hearings conducted by Congress prior to enactment indicated in part the following:

1. There are more than eight million handicapped children in the United States
2. The special education needs of these children are not fully met
3. More than half of the handicapped children in the United States do not receive appropriate educational services which would enable them to have full equality of opportunity
4. More than half of the handicapped children in the United States are excluded entirely from the public school
5. Many handicapped children throughout the United States participate in regular school programs with handicaps which prevent their having a successful educational experience because their handicaps are undetected<sup>4</sup>

The purpose of the Act is stated thus:

. . . to assure that all handicapped have available to them . . . a free appropriate public education which emphasizes medical, education, and

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<sup>3</sup>U.S. Congress, Public Law 94-142 (1975).

related services designed to meet their unique needs; to assure that the rights of handicapped children and their parents or guardians are protected; to assist states and localities to provide for the education of all handicapped children; and to assess and assure the effectiveness of efforts to educate handicapped children.<sup>5</sup>

The Federal Register, on August 23, 1977, published regulatory legislation complementing Public Law 94-142. Public Law 94-142's implementation is governed by these regulations which provide interpretation of the law to state education agencies. As stated in the Federal Register, the purpose of the regulations is "to insure that all handicapped children have available to them a free appropriate public education which include[s] special education and related services to meet their unique needs."<sup>6</sup>

Special education is interpreted to mean:

Specifically designed instruction, at no cost to the parents, to meet the unique needs of a handicapped child, including classroom instruction, instruction in physical education, home instruction, and instruction in hospitals and institutions.<sup>7</sup>

Regulation and provision for staff development relating to the handicapped under Title VI-B under Public Law 91-230<sup>8</sup> was amended by Public Law 94-142. Regulation under

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<sup>5</sup>Ibid., sec 3(c).

<sup>6</sup>U.S. Department of Health, Education and Welfare, Office of Education. Federal Register (Washington, D. C.: 1977), Sec. 121(a)(1).

<sup>7</sup>Ibid., sec. 121(a)(14).

<sup>8</sup>U.S. Congress. Public Law 91-230.



current legislation provides for the assurances that the state will establish procedures for a comprehensive system of personnel development to include the following:

1. Inservice for special education class teachers
2. Inservice for regular class teachers
3. Inservice for educational support personnel such as psychologists, social workers, guidance counselors, school nurses, physical therapists, occupational therapists, and recreation therapists<sup>9</sup>

In addition, Public Law 94-142 makes certain stipulations for personnel in local education agencies regarding certification. The state education agency is directed to assure the certification of all teachers employed specifically to work with special needs children. Other school personnel providing auxiliary services such as speech therapists, psychologists, occupational therapists, etc. are also appropriately accredited through programs or licensing boards.

A Review of North Carolina Legislation  
Relating to the Special Needs Child

In 1974, the North Carolina General Assembly enacted a law, "The Equal Educational Opportunities Act."<sup>10</sup> Chapter 1293 established a policy ensuring that the state provide

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<sup>9</sup>Ibid., Public Law 94-142, sec. 12(a), 224.

<sup>10</sup>North Carolina General Statutes, Sec. 115-360 (1974).

every child a fair and full opportunity to reach his full potential and that no child as defined under the act be excluded from service or education for any reason. The policy established these rights for children from birth through 21 years of age. The state required policy compliance through the following:

1. Local educational agencies
2. City and county administrative units
3. State departments and agencies
4. Local human resource agencies
5. Private providers who are recipients of General Funds defined in General Statute 143-1.<sup>11</sup>

On July 1, 1977, the North Carolina General Assembly ratified House Bill 824, "An Act to Provide for a System of Educational Opportunities for All Children Requiring Special Education."<sup>12</sup> The purposes of House Bill 824 were to repeal portions of the existing state exceptional-children law and to bring state law into conformity with federal legislation. House Bill 824 stipulated as a policy of the state the following:

1. To provide a free appropriate publicly supported education to every child with special needs
2. To provide for a system of special educational opportunities

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<sup>11</sup>Ibid., sec. 115-1.1a.

<sup>12</sup>North Carolina, General Statutes (Creech, 1977).

3. To provide a system for identification and evaluation of education needs
4. To require an evaluation of child needs prior to special education placement
5. To require an evaluation of program benefits subsequent to special education placement
6. To prevent denials of equal educational opportunity on the basis of handicap
7. To assure the protection of the rights of children with special needs
8. To ensure the absence of inadequacies, inequalities, and discrimination with respect to children with special needs
9. To bring state law, regulation, and practice into conformity with relevant federal laws
10. To enable all children with special needs to benefit from appropriate programs of special education and training.<sup>13</sup>

This action on the part of the state emphasized the rights of the handicapped to free appropriate education and provided for the eligibility of the state to receive funding under Public Law 94-142 once the state established policy consistent with this purpose.

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<sup>13</sup>Ibid., sec. 115-360.

In addition, House Bill 824 clearly defines "special education" and "related services," in such a manner that makes them consistent with federal legislation. The Bill does, however, override Public Law 94-142 regarding age restrictions. It defines children with special needs under the intent of the law as ages 5 through 17. This absolves the state of the requirement to provide special education and related services to children with special needs, from birth to four years old and from 18 through 21.

House Bill 824's stipulations regarding the required implementation of a state plan to meet the entire mandate of the law is certainly of greater scope than Chapter 1293. In the area of personnel development alone, it requires that the state will maintain a plan for the implementation of House Bill 824 to include the following:

1. An inventory of facilities and personnel available for special education
2. Standards for the education of children with special needs
3. Programs and procedures for the development and implementation of a comprehensive system of personnel development<sup>14</sup>

The greatest implication for this section of House Bill 824 is that the plan required is designed to be an on-going planning effort rather than a one-shot plan for service

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<sup>14</sup>Ibid., sec. 115-160-1.

provision. Within the scope of the ongoing plan for implementation are the following stipulations:

1. The establishment of classes
2. Programs of instruction
3. Curricula
4. Facilities
5. Equipment and special services
6. The utilization and professional development of direct services staff.<sup>15</sup>

As a follow-up to the mandates of House Bill 824, the North Carolina General Assembly ratified Senate Bill 428.<sup>16</sup> This bill directed the state to develop a comprehensive plan to prepare teachers and other educational personnel to work with children with special needs in North Carolina. It further directed that this study be reported to the General Assembly in February, 1979.

The Cooperative Planning Consortium of Special Education Training Programs in North Carolina and the State Department of Public Instruction's manpower development committee, the Comprehensive System for Personnel Development (CSPD), made up the consortium which developed and submitted the report. The development of the report included the following activities:

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<sup>15</sup>Ibid., sec. 115-179-1.

<sup>16</sup>N.C. S.B. 428 (1978).

1. An assessment of current and future professional needs in public schools and other educational settings in North Carolina

2. An assessment of current education and training activities among colleges and universities in North Carolina

3. An analysis of the differences between current activities and future needs in North Carolina.<sup>17</sup>

The Comprehensive System for Personnel Development constituted more than an annual plan for compliance with Public Law 94-142. It was designed to assist North Carolina schools in effective change and to provide collaboration for the improvement of educational delivery systems to children with special needs. Its two major goals as stated in the Comprehensive System of Personnel Development Guidebook are:

1. To develop a cooperative plan to facilitate the preparation of personnel to meet the identified needs of special needs students
2. To disseminate to teachers and administrators of programs for exceptional children significant information derived from educational research for demonstration programs<sup>18</sup>

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<sup>17</sup>North Carolina, State Department of Public Instruction, Advancing the Education of Exceptional Children (Raleigh: 1979), p. 12.

<sup>18</sup>North Carolina, State Department of Public Instruction, Comprehensive System of Personnel Development Guidebook (Raleigh: 1980), p. 14.

A Review of Significant Court Cases  
Related to the Special Needs Child

The Pennsylvania Association for Retarded Children v. Commonwealth of Pennsylvania case<sup>19</sup> was brought to court on behalf of all retarded children in Pennsylvania who were excluded from school. This case set a precedent that was under both state and federal constitutions--that children with special needs have a right to equal education opportunities under the equal protection doctrine, and to hearings prior to denial of educational opportunity due to their handicap relating to due process rights.

In North Carolina, the North Carolina Association for Retarded Children and certain individual plaintiffs filed a class action in federal district court. The North Carolina Association for Retarded Citizens v. North Carolina was a landmark case,<sup>20</sup> alleging that the state, its political subdivisions, and certain named officers of the state and its subdivisions had violated the constitutional rights of handicapped school-aged persons in North Carolina to an equal educational opportunity. The plaintiffs relied on the PARC interpretations of the Fourteenth Amendment (equal protection and due process) in asserting denial of their rights to an

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<sup>19</sup>Pennsylvania Association for Retarded Children v. Commonwealth of Pennsylvania, 348 F. Supp. 866 (1972).

<sup>20</sup>North Carolina Association for Retarded Citizens v. North Carolina, 438 N.C. 325 (1978).

equal educational opportunity; they also relied on the state constitution and the state's compulsory school attendance law in asserting that they had been discriminated against by the state under its own laws when they were denied an equal educational opportunity. As a result of new state and federal legislation, a consent agreement was reached in July, 1978.

The Mills v. Board of Education of the District of Columbia suit,<sup>21</sup> brought on behalf of all children in the District of Columbia, had similar issues. Both sought to establish the constitutional principle that children excluded from school as uneducable were entitled to publicly supported educational opportunities. Both cases insisted on the procedural protection of children prior to placement in special programs. The courts established in both cases that those children formerly excluded should be located, evaluated, and placed in programs which would appropriately meet their needs. In addition, it stressed the need for the education of children in the least restrictive environment (a factor incorporated in following federal legislation). The case required that all children in special classes as well as those students referred for special services be re-evaluated every two years, and that in the event that a parent or child questioned, recommended, denied, or changed placement in a

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<sup>21</sup>Mills v. Board of Education of the District of Columbia, 314 D.C. 982 (1972).



special class that a procedural due process hearing be conducted.

In the Mills case, the defendants claimed in response to the decree that it would be impossible for them to afford relief sought by the plaintiffs. In return, the court declared that the inadequacies of the District of Columbia public school system, whether due to insufficient funding or administrative inefficiency, could not bear more heavily on the handicapped child than on the normal child.<sup>22</sup>

Martinelli recognized that special education is but one entity in the complex, formal institution of education. Consequently, external and internal factors may hinder school districts from compliance with policies mandated by all levels of government.<sup>23</sup>

Martinelli discussed three of the major external factors relating to school district size: distribution of student population, social attitudes toward education, and economic factors. He noted that many parents of handicapped students have moved from rural to urban school districts in order for their children to receive special education and

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<sup>22</sup>Frederick Weintraub and Albert Abeson, Public Policy and the Education of Exceptional Children (Reston, Virginia: Council for Exceptional Children, 1976), p. 31.

<sup>23</sup>John Martinelli, "LEA's and Public Policies," in Public Policy and the Education of Exceptional Children (Reston, Virginia: Council for Exceptional Children, 1976), p. 17.

support services unavailable in sparsely populated districts. The number of handicapped children in urban areas has increased faster than some large, urban school districts can accommodate their educational needs. The decline in the number of handicapped children in rural areas has made special education even more costly to provide in small rural sections.

Preferences in school districts toward a production focus on education may affect the availability of educational resources available to handicapped children. These local preferences may or may not be in accordance with state and national emphases. If local economic investment in education is based on economic return, there will be minimal provision of educational programs for those handicapped children who are viewed as nonproductive members of society.<sup>24</sup>

The local education agency's fiscal ability and effort are strong determinants in the provision of appropriate educational services to the handicapped child. The capabilities of local educational agencies to finance educational and supportive services as well as appropriate training vary greatly from district to district. Some state legislative bodies have not acted to eliminate these inequities. The court ruled it the responsibility of the state, in Case v. California, to provide adequate and equal educational

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<sup>24</sup>Ibid., p. 19.

opportunities for all children, handicapped or otherwise.<sup>25</sup>  
In other words, if inequities exist, they must exist across all programs in the school system.

The court established in Lebanks v. Spears that every child who is mentally retarded or suspected of being mentally retarded is entitled to (a) evaluation and development of a special education plan and periodic review and (b) provision of a free public program of education and training appropriate to his age and mental status.<sup>26</sup> There was also the assumption that

. . . among alternative programs and plans placement in regular public school class with the appropriate support services is preferable to placement in special public school class and placement in a special public school class is preferable to placement in a community training facility. . . .<sup>27</sup>

In Rainey v. Tennessee Department of Education, the court established that handicapped children be provided special educational services in as normal educational environment as possible and that labeling of individual children should be minimized.<sup>28</sup>

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<sup>25</sup>Case v. California, 832-17, 1963.

<sup>26</sup>U.S. Department of Health, Education and Welfare, Office of Education, Federal Register (Washington, D.C.: 1974), p. 14.

<sup>27</sup>Ibid.

<sup>28</sup>Rainey v. Tennessee Department of Education, 4-3100 Tenn. 202 (1974).

As a final note to right-to-education issues, an important principle was established in Colorado Association for Retarded Children v. Colorado, which found that ". . . mere enactment of legislation without actual implementation does not render substantial legal questions moot."<sup>29</sup>

The Dilemma of Implementation  
of Public Law 94-142

Historically, services for exceptional children have been developed as special-interest groups have brought the necessary pressure to obtain funding for such services. Cruikshank and Johnson noted that these services have been developed on the basis of clinical instances, or applied in ways which might have a negative impact on the children labeled.<sup>30</sup> As categorical services were developed, training programs were developed to prepare professional personnel to staff the service programs which carried the same categorical labels, e.g., mental retardation, behavior disorders, learning disabled.

For at least ten years it has been recognized that serious problems are created by the labeling of children and the funding of programs that are physically and

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<sup>29</sup>Federal Register (1977), p. 27.

<sup>30</sup>William Cruickshank and George Johnson, Education of Exceptional Children and Youth (Englewood Cliffs: Prentice Hall, 1958), p. 138.

philosophically separate from the educational and other child-socializing opportunities provided for nonhandicapped children. While it is indeed the case that many handicapped children require services which may result in their separation from their nonhandicapped peer group, most handicapped children can be served in regular educational settings if teachers and other educational specialists are adequately prepared to meet their needs. There is a strong research foundation for the proposition that educational and social benefits accrue to handicapped children in the least restrictive educational environment.<sup>31</sup> Conversely, the negative effects of segregating handicapped children for specialized educational services are frequently substantial.

In order to obtain services for exceptional children, it has been necessary for advocates (parents and professionals) to describe the children as a group.<sup>32</sup> The fact is, however, that handicapped children are more different from each other than they are different from their nonhandicapped peers. Advocacy groups of children and the resultant categorical funding of programs has contributed to the myth that we are dealing with children who are mostly alike, and not significantly different as individuals.

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<sup>31</sup>Howard Goldstein, John Moss, and Laurence Jordan, The Efficacy of Special Class Training on the Development of Mentally Retarded Children (Urbana, Ill.: Institute of Research of Exceptional Children, 1965), pp. 215-217.

<sup>32</sup>Robert Jones, "Labels and Stigma in Special Education," Exceptional Children 38 (Fall 1972), pp. 563-569.

In reality, exceptional children are individuals with specific needs which must be met by an educational curriculum tailored to their specific learning needs.<sup>33</sup>

In recent years there has been a concentrated effort to focus on the normal growth and development needs of children who are handicapped and who have specific service needs at particular times. Martinelli noted that thinking of children as having specific learning or developmental needs rather than thinking of them as handicapped children has been the basis of a rather substantial shift in thinking about special education services during the past five years.<sup>34</sup>

Jones indicated that there has been a lack of integration of special education services. He further stated that services for different types of children have been artificially separated. There has also been a lack of integration of services for the handicapped with the regular or normal educational system. The idea of bringing all children into the mainstream of educational life has no meaning unless services can be effectively linked and integrated.<sup>35</sup>

The concept of continuity of care and comprehensive services effectively integrated is not a new one. What is

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<sup>33</sup>Nicholas Hobbs, The Futures of Children (San Francisco: Jossey-Bass, 1975), p. 228.

<sup>34</sup>Martinelli, Public Policy and the Education of Exceptional Children, p. 77.

<sup>35</sup>Jones, "Labels and Stigma," p. 570.

new is the legal requirement that all children must be educated in the least restrictive educational environment and the seriousness with which the concept must now be taken in order to comply with the federal Public Law 94-142 and the state law House Bill 824.<sup>36</sup>

In order for a system of comprehensive integrated services to be available to all children, and in order for the concept of the right of all children to an appropriate education in the least restrictive setting to have meaning, there must be a strong commitment to the education and training of professionals to deliver those services. There must also exist a strong commitment to research and to improvement of the knowledge base for the delivery of quality educational services and training.

Field-based or inservice training has become a primary focus as a result of the stipulations of Public Law 94-142. In order to provide mainstreamed educational services to the majority of exceptional children, there must be a strong and concerted effort to provide training to regular classroom teachers and other professionals who teach normal children but who have not been trained in the methods and technologies of special education.<sup>37</sup> Another

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<sup>36</sup>U.S., Congress, Pub. L. 94-142 (1975); N.C., General Statutes, Sec. 115 (1974).

<sup>37</sup>Allen Gunn, Successful Programming: Many Points of View (San Rafael, Calif.: Academic Therapy Publications, 1979), p. 83.

aspect of the provision of inservice training efforts has to do with the retraining of special educators and other professionals who were trained to provide educational services for exceptional children, but who were not trained to provide the integrated, technical support services necessary for mainstreaming. As Martinelli stated, a good special class teacher is not necessarily a good consultant for regular classroom teachers. Different competencies are involved and existing professional personnel must be trained to engage in this new role.<sup>38</sup>

Local education agencies are left with the initial responsibility for developing a local plan making inservice training available to all general and special personnel. Regulations relating to Public Law 94-142 stipulate that the plan must ensure that inservice programs include

1. Use of incentives for teacher participation
2. Involvement of local staff in determining needs and programs
3. Use of effective innovative practices
4. Alternative professional development opportunities.<sup>39</sup>

Local school districts across the country now have the legal responsibility for planning and making available

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<sup>38</sup>Martinelli, p. 73.

<sup>39</sup>Pub. L. 94-142, sec. 121(a), 382(b)(1)-383(b)(1).



inservice training in special education. For most districts this process represents their first steps in systematically addressing inservice training needs in special education. There is no lack of issues or concerns relating to inservice training, but there is a lack of relevant experience, hard data, and proven procedures which can be effectively adopted.

School districts are in part dependent upon the effectiveness of their state agency in acquiring and coordinating resources needed to support local efforts. In a report of the National Inservice Network, a list of representative questions school districts must resolve are included:

1. How is inservice training in special education related to other inservice training?
2. How will inservice training be defined?
3. How will the necessary participation in planning be gained?
4. How will inservice needs be determined?
5. What forms of inservice delivery are possible?
6. How will the content for inservice be determined?
7. How will local staff be used?
8. How are principals involved in building-based inservice?
9. How can inservice training be individualized?
10. How will inservice efforts be financed?
11. What incentives will be provided?
12. Who will provide inservice?
13. How will acceptance for and participation in the inservice be gained?
14. How will transfer of training be supported?
15. How will teacher collective-bargaining issues be dealt with?<sup>40</sup>

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<sup>40</sup>Kenneth Baker, "National Inservice Network: An Emerging Collaborative Effort between Regular and Special Educators," Inservice (October, 1980), pp. 22-23.

The problems facing the developing inservice efforts can be addressed and hopefully solved through coordinated state planning and support combined with well-considered local efforts at providing effective inservice training.

As stated previously, each local educational agency has the responsibility for developing a Local Education Agency Application under Public Law 94-142, which must include procedures for the implementation and use of the Comprehensive System of Personnel Development established and described in each state's Annual Program Plan.

Implementation of the Personnel Development section requires an unprecedented collaborative effort among state education agencies, local education agencies, and institutions of higher education. Meyers pointed to a number of factors which hinder cooperative planning on the scale which is needed. The task looks difficult in light of the history of relationships and perceptions held about each other by the various agencies. Meyers feels that there is a tendency for local school districts to assume they are the only participants who know what is occurring on the front lines.<sup>41</sup> State agencies are often perceived as having a regulatory image, and institutions of higher education have difficulty escaping the "ivory tower" label. Meyers cautioned that these attitudes often interact to keep cooperative planning devoid of commitment and without

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<sup>41</sup>Meyers, Exceptional Children, p. 262.

direction. Rude, in a status study of State Annual Program Plans for Inservice Training, concluded that "personnel development planning in most states is incomplete and lacking in comprehensiveness."<sup>42</sup> This conclusion is consistent with those arrived at by Schofer and Duncan in their national status study of statewide cooperative manpower planning in special education.<sup>43</sup>

Merely mandating cooperative planning and the provisions of inservice training is not sufficient. Improving instruction for handicapped students through inservice training requires a major investment of resources coupled with carefully planned improvement efforts. The force of law alone will not make inservice training an effective vehicle for improving the education of handicapped children. Those responsible for planning and delivering inservice training must demonstrate a sensitivity to real needs and a convincing capacity to deliver effective and efficient inservice training.

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<sup>42</sup>Charles Rude, "Trends and Priorities in Inservice Training," Exceptional Children 45 (Spring 1978), p. 174.

<sup>43</sup>Andrew Schofer and Robert Duncan, Quality Practices Task Force Report (Bloomington: Indiana University Press, 1978), pp. 42-44.

## CHAPTER III

### A REVIEW OF NATIONAL NEEDS ASSESSMENT PROCEDURES

Nationwide there has developed a greater awareness of the need for additional training for those involved in meeting the educational needs of the handicapped. This greater awareness has led to a variety of inservice training programs designed to provide educators with techniques and methods relevant to teaching handicapped children. Developing a needs assessment procedure which will most likely produce an optimal inservice training program is therefore essential. Since there is no single optimal inservice program that fits all situations, how a program is selected becomes a decision of major importance. In this chapter a number of needs assessment procedures will be reviewed for the purpose of providing a greater overview of such procedures.

#### Comprehensive System of Personnel Development

The Comprehensive System of Personnel Development (CSPD) in effect designates a conceptual framework with which to formulate programs of personnel development in special education. As such it may serve as a useful guideline for selection of specific needs assessment

models. The acronym CSPD refers to four fundamental concepts that may serve as useful guidelines for designing a needs assessment program.

Comprehensive refers to the requirement that assessment involve those individuals and agencies concerned with the education of handicapped children. The individuals and agencies may involve state and local leadership; instructional, related services, and support personnel in special and regular education; professionals who prepare personnel on inservice and preservice levels; decision makers and centers of influence from the public and professional sectors; parents and advocates for the handicapped; people from rehabilitation, social service, and health related agencies; professionals who provide services in dissemination and technical assistance; and the community at large.<sup>1</sup>

System refers to the need for cohesive unity. System implies a unified approach that contrasts with an uncontrolled, nondirected, fragmented, and random process. What is needed is a systematic growth pattern for personnel development.

Personnel involves more than just a few professionals assigned to handicapped children. Personnel includes parents and any individual who contributes significantly to the education of handicapped pupils. Some individuals should

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<sup>1</sup>"Personnel Development in Special Education: Comprehensive System of Personnel Development," ERIC Clearinghouse on Handicapped and Gifted Children, Fall 1980, p. 1.

have access to resources essential for their development as personnel.

Development implies ongoing growth. Through development there is achieved depth in the skills, attitudes, and knowledge needed to guide pupils in developing their capacities.

CSPD may be easily misapplied by individuals who fail to grasp the systems approach. Care should be taken not to overemphasize one of its four components at the expense of the others. For example, CSPD may be seen as participatory planning or as inservice or as some other special technique, whereas in fact CSPD cannot be identified as one or a combination of its parts in isolation from the remaining parts. CSPD is "all of these vital elements, made whole and synergistic by an integrating, coordinating force."<sup>2</sup>

The CSPD approach challenges those individuals who identify with some special point of view. The system is basically a cooperative effort to encourage authentic growth through creative dialogue among those concerned with education of the handicapped. CSPD calls for local, state, and federal partnerships for planned change in methods dealing with the handicapped.

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<sup>2</sup> Ibid., p. 1.

The University of Southern California Trainer-  
of-Trainers Program

The University of Southern California School of Education Trainer-of-Trainers Program sought to develop a well-trained cadre of inservice trainer leaders who could meet a diversity of training needs, and thereby establish within a school district a program for meeting many of its ongoing inservice needs.<sup>3</sup> Of special concern for the present review is not the training itself but the procedure that was employed in establishing it.

The Trainer-of-Trainers Program was designed on the basis of systematic preplanning. District personnel surveyed staff to establish priority of inservice needs. The University of Southern California staff created the Trainer-of-Trainers goals and objectives. Through collaboration a multidisciplinary team of six experts in the identified content fields was established. The team implemented the initial training and formed the support system used in one of the phases of the actual training program.

A district advisory committee made up of teachers, principals, and district staff clarified the goals and objectives until both groups felt that the program was sufficiently formulated. Five meetings between the team and the district advisory committee further established the program

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<sup>3</sup>Elsa N. Brizzi, "A Collaborative Trainer of Trainers Inservice Program," Inservice, (October 1980), pp. 28-31.

goals and objectives. Also established were processes to guarantee new structures of governance which could adapt contents and learnings to individual trainers and schools.

The president of the Lynwood School Board (for whom the program was designed) actively backed the program and participated in the opening meeting. District personnel were represented at every inservice session. Team members observed the daily evaluations which followed each intensive session, and participated in wrap-up discussions at the end of each session.

Principals tried to find those teachers who expressed willingness to participate in the trainer phase and who met certain preset criteria. Trainers themselves excelled as needs assessors of their own schools and as collaborators with the principal and staff in planning the sessions. Trainees were asked to evaluate the teacher trainers and the inservice process. While the foregoing description of program development is not directly related to programs for the handicapped, it does illustrate the general process of CSPD that might be applied to such programs.

#### Training Needs Assessment Task Force

The ERIC Exceptional Child Education Report<sup>4</sup> for 1980 dealt with the National Inservice Network's view of

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<sup>4</sup>ERIC, Needs Assessment for Inservice Education: Building Local Programs (Reston, Virginia: The Council for Exceptional Children, 1980).



needs assessment for inservice education, with emphasis on building local programs. A number of topics relating to needs assessment were dealt with by the four authors comprising the task force which drew up the report. One of these topics had to do with the current state of the art in educational needs assessment. According to task force member George Kuh, at least fifteen questions should be answered when planning and conducting a needs assessment:

1. What is the problem or situation out of which needs will emerge?
2. Is there a need for a needs assessment?
3. Has a needs assessment team been identified?
4. What are the purposes or expected outcomes of the needs assessment?
5. Whose needs are to be assessed?
6. What types of needs are to be assessed?
7. Will a strengths analysis be performed?
8. How will the required information be collected?
9. Have the data-gathering devices been field tested?
10. Has the desired information been collected?
11. How will the data from the needs assessment process be analyzed?
12. What are the implications of the needs assessment data?
13. Are the results of the needs assessment communicated in the appropriate forms to various constituencies or stakeholders?

14. Have the needs assessment data, implications, and recommendations been integrated into the building, district, and classroom planning process?
15. Are the target groups being monitored to document the continuing validity of the identified needs?<sup>5</sup>

Kuh suggested that needs assessment developments have not been communicated adequately to educational planners. He believes that needs assessment works best when performed on a relatively small scale. Thus building-level needs assessment is preferable to district-level assessment, and classroom-level assessment preferable to that at the building level. Holding teachers and students partially responsible for assessing their own needs was seen by Kuh as making the process educative and synergistic.

In such instances the human connections between teachers, students, administrators, and parents are not buried in an appendix of a report generated by the central office, but rather are emphasized by those who personally experience and benefit from the interaction.<sup>6</sup>

Another of the four task force members, Sharon Davis, indicated that needs assessment should be designed as an integral component of the cycle of planning, implementing, and evaluating inservice education programs. Such an approach makes needs assessment an ongoing function of its program. Davis wrote that while approaches to needs

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<sup>5</sup>Ibid., pp. 9-12.

<sup>6</sup>Ibid., p. 13.

assessment vary, there is significant agreement concerning the steps that are indigenous to the process. She listed seven major steps of a successful needs assessment process:

1. State concerns
2. Identify people and roles.
3. Plan the needs assessment data collection.
4. Implement the needs assessment data collection.
5. Disseminate results and set priorities.
6. Design the inservice program.
7. Continue to assess needs.<sup>7</sup>

Davis listed a number of strategies available for needs assessment data collection. These include interviews (structured, unstructured, telephone), questionnaire, checklist, content analysis of existing records (documentary analysis), observation, group process techniques (brainstorming, buzzing), nominal group technique (the group identifies, ranks, and prioritizes needs statements), Delphi technique, testing, hearings, task force or committee, workshops, slip writing, card sort, and studying students.<sup>8</sup>

The Task Force report concluded with a review of needs assessment in practice. For this purpose four inservice training programs conducted in local school systems in the United States were visited to gain information about good needs assessment practices. The Regular Education

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<sup>7</sup>Ibid., p. 15.

<sup>8</sup>Ibid., pp. 24-31.

Inservice (Mainstreaming) Program illustrates the complete needs assessment process in practice, and is a good example of how needs assessment can be conducted simultaneously with the actual inservice program. The Regular Education Inservice Project illustrates several steps in needs assessment process and illustrates how an existing needs assessment instrument was adapted to meet local needs. Project SERC (Special Education in the Regular Classroom) presents a number of techniques for assessing and reassessing inservice training needs, including the Q sort, nominal group technique, and observation. Finally, the Model Program for Personnel Preparation in Secondary Schools shows how a project experimented with a variety of needs assessment techniques in order to continually revise and improve needs assessment procedures.

Regular Education Inservice Mainstreaming  
Program, El Paso, Texas<sup>9</sup>

This program was developed in order to meet the mandates of both Public Law 94-142 and Texas laws regarding education of handicapped children in the least restrictive environment. It was designed to retrain teachers in individualized strategies to meet the special needs of the handicapped learner in the regular classroom. The project is designed to train four teachers and the principal from each of ten school campuses each year for a three-year period. When trained, these

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<sup>9</sup>Ibid., pp. 35-37.

people are expected to provide assistance to their colleagues and to conduct a building-level workshop before the project year ends.

To plan and conduct the needs assessment, a project staff of three people, together with a project advisory council with a representative from each school district, was formed to assist in planning and programmatic decisions. The advisory council was instrumental in gaining support for the needs assessment and inservice program.

The project staff employed several ways to identify the needs of the 50 people selected to receive training each year. Using six major previously identified needs, a checklist was devised. Participants were asked to rate their competency in performing specific tasks that fell within the six categories of need. Participants were also asked to assess innovations affecting their role in providing education to handicapped children in the regular classroom. Project staff continued to assess needs throughout the year. Technical assistance was provided to teachers individually in their classrooms, and a written record was kept of the various visits in which concerns about working with handicapped children and needs for training were identified.

The results of the questionnaires were tabulated and used for the purpose of deciding what needs were priorities for the teachers. Workshops were planned to cover these priorities. At the end of the project year, all participants

responded again on a questionnaire. Pretest and posttest results were compared and served as an evaluative base for how well the project met the needs of participants.

Regular Education Inservice Project,  
Reidsville, North Carolina<sup>10</sup>

The Reidsville City Schools system was concerned about inservice education for regular classroom teachers as many teachers had had little experience working with handicapped children. The teachers of the system had already expressed needs for inservice education and direct classroom support as required by state and federal law with respect to educating handicapped children. The school system noted the need for better interstaff relations and increased parental and community involvement in the education of handicapped children.

The leadership and planning team, which included the project director and special educators from the school district, decided to modify and adapt for local use an existing needs assessment instrument to identify the individual needs of each participant. Within the first few days of the school year, the assessment instrument was administered in each school by the teacher who was a member of the special education cadre. Within two weeks the cadre had prepared individual profiles which expressed each person's needs in percentages

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<sup>10</sup>Ibid., pp. 37-38.

in every category of assessment. A member of the Cadre conferred with each teacher and, keeping the profile in mind, respondents were asked to establish their needs for inservice. The project director then aggregated individual responses and produced a ranking of needs for each school and for the system. These data were sent to the superintendent, director of instruction, director of exceptional programs, and principals, so that there would be a system-wide base of support for the subsequent programming effort.

Individual priorities for inservice education were matched across the system and a schedule for workshops was set up. Contracts were let to consultants who could address the identified topics. The inservice program provided workshops on 18 separate topics. About 82 percent of the trainees rated the overall success of the program as above average.

Project SERC: Special Education in the Regular Classroom, Morgantown, West Virginia<sup>11</sup>

Project SERC was designed to meet Public Law 94-142 and provide information about working with mildly disabled learners for regular classroom teachers. During the first training workshop, teachers were asked to respond to three instruments designed to help individual teachers and project staff identify areas in which teachers may need training.

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<sup>11</sup>Ibid., pp. 38-39.

One instrument was an attitude test toward handicapped children and the various methods for working with particular handicapped children in the classroom. A second instrument was a special education information test which measured teachers' knowledge of special education concepts and laws affecting special education. The third instrument was an adaptation of the Q Sort, which determines how individuals presently perceive themselves on a specific item (real score) and how they would like to be on that item (ideal score). Discrepancies between real and ideal scores serve as a guide for training designed to meet these expressed needs. The nominal group techniques was also used to identify and prioritize training needs. In this approach, individual needs were discussed by the group and subsequently prioritized.

As a final assessment of needs and effectiveness of the training, the initial three instruments were readministered to the project participants. The pretest and posttest results were compared to show changes in attitudes and knowledge and to determine whether trainees' real perceptions of themselves had moved closer to the ideal they would like to achieve.

Model Program for Personnel Preparation in  
Secondary Schools, Pittsburgh,  
Pennsylvania<sup>12</sup>

In this program of needs assessment, the techniques used for identifying workshop topics had evolved during the

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<sup>12</sup>Ibid., pp. 39-40.



first two years of the project. In 1978, questionnaires were used at the start of the project to determine the needs to be covered in the workshops. But the project staff felt that this technique alone did not provide adequate information. For the 1979-1980 school year, an informal social event was held to discuss training needs. These needs, together with needs noted by supervisors and project staff, were used as a foundation for planning fall workshops the second year. In the spring of 1980, project staff refined their needs assessment procedure again. The first workshop held in the spring served as a planning session for future workshops. A group process technique similar to brainstorming was developed to identify and establish needs.

Another component of the program was designed to train special-education resource teachers to serve as trainers of regular education teachers within each high school. The resource teachers were trained to identify the needs of the teachers in their building and to provide training and individualized assistance as needed.

At the beginning of the school year the project staff aided the resource teachers in developing a questionnaire to be administered to teachers for the purpose of identifying the various training topics. The questionnaire served as a means for the resource teachers to initiate a personal discussion with teachers in which

their interests in the particular workshop training topics were determined. Based on the questionnaires and followup interviews, the resource teachers then planned several workshops for teachers in the particular school.

Needs assessment was ongoing throughout the year in a number of ways. At the end of each workshop, the evaluation procedure provided an opportunity to solicit input for future workshops. The resource teacher contacted each teacher personally to see if the workshop had met his or her needs. Meetings of department chairpersons were also used to identify training needs. Project staff visited many of the schools and were able to help resource teachers clarify workshop topics and goals. The resource teachers met periodically as a group to discuss training needs for future workshops.

The training program which emerged was flexible and based on the needs of teachers in each building. The workshops addressed topics concerned with individualizing lessons, solving behavior problems, using and modifying media and materials for handicapped students in the regular classroom, and referring students to special programs. The resource teachers followed up the workshop by helping interested teachers apply the information from the session to their classroom.<sup>11</sup>

As a result of observing needs assessment in action, the National Inservice Network Task Force

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<sup>13</sup>Ibid., p. 40.

identified a number of good practices, which can be summarized as follows:

1. Needs assessment should be an ongoing process. As trainees become more knowledgeable about the topic, their needs change. Most of these training programs continually reassessed participants' needs.

2. Continual reassessment of needs requires flexibility in program design. If emerging needs are identified during the implementation of the training, the program should be able to adapt to these needs.

3. There must be a visible relationship between the needs assessment and the program delivery. Conducting a needs assessment leads people to expect that training will be developed to meet those needs.

4. Trainees' own perceptions about their needs must be viewed as important. Participants should be involved in planning the needs assessment, prioritizing needs, and program decision making.

5. Needs assessment information should be gathered from more than one source, using different data collection techniques. This results in a more comprehensive identification of needs.

6. Valid and reliable data collection techniques should be used. Trainees will be more willing to accept the results of the needs assessment if they perceive that the

assessment strategies used are valid.

7. Needs assessment techniques should be used that identify individuals as well as group needs. Teachers tend to be more enthusiastic about training that assists them with their specific needs for working with children in their classrooms.

8. Information gathered about training needs should be disseminated to those people who participated in the needs assessment and to other audiences who may have an interest in it (for example, the community and school board members). This helps to establish credibility for the inservice program which is developed.<sup>14</sup>

#### National Organizations and the Identification of Inservice Training Needs

A survey of nine national educational organizations which belong to an informal Consortium on Inservice Education formed by the Council for Exceptional Children (CEC) was performed in the fall of 1979.<sup>15</sup> Their responses were placed

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<sup>14</sup>Ibid., pp. 41-42.

<sup>15</sup>American Association of School Administrators, American Federation of Teachers, National Association of Elementary School Principals, National Association of Secondary School Principals, National Association of State Boards of Education, National Association of State Directors of Special Education, National Education Association, National School Boards Association, The Council for Exceptional Children.

in four categories, with the number of organizations using each needs assessment technique being contained in parenthesis.

1. Analysis of existing records. Analyze state's Annual Program Plans (1).

2. Use of surveys. Survey members with a needs assessment questionnaire (6) and formally interview members about problems related to implementing PL 94-142 and needs for training (3).

3. Collection of opinions of others. Base decisions on inservice training needs on what knowledgeable headquarters staff believe organization's members need to know (1); convene a task force or committee to examine inservice training needs (4); identify needs from problem areas reported at meetings of the organization's executive board (4); and identify needs from problem areas reported by the Bureau of Education for the Handicapped (1).

4. Observation and interaction. Note concerns and problems of constituents in implementing Public Law 94-142 as identified through calls to headquarters and questions to staff members who travel in the field (5).<sup>16</sup>

In general, the analysis of existing records to determine training needs received little attention by these

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<sup>16</sup>Sharon Davis, "The Identification of the Inservice Training Needs of Educators Working with Handicapped Children," Inservice, October 1980, pp. 8-9.

national organizations. They were considerably more directed toward contact and interaction with their members. Six organizations employed a questionnaire to reach their members, while three conducted interviews for determination of needs. Five of the organizations reported that they looked into concerns and problems of their constituents over implementing Public Law 94-142. These issues were identified through calls to headquarters and questions asked of staff members who function in the field. Needs assessment data were also obtained from meetings of the executive board. Several of the organizations established a task force or committee to identify training needs.

Needs assessment techniques used by a particular organization tend to be tailored to the desires of their members. Thus, if an organization reports its membership as being overwhelmed with paper work, it will not very likely send out a questionnaire. In any event, "An organization with an executive board that is strongly interested in the training needs of members will use this body as a source of information on needs."<sup>17</sup>

State Agencies and the Identification of  
Inservice Training Needs

In response to Public Law 94-142, each state must produce a plan for a comprehensive system of personnel

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<sup>17</sup>Ibid., p. 9.

development to be included in the state's Annual Program Plan submitted to the Bureau of Education for the Handicapped (BEH) in order to receive Part B funds. In order to determine how states are meeting the requirements for developing an inservice training plan, the Council for Exceptional Children conducted a review of 1978-79 Annual Program Plans from 49 states.<sup>18</sup> Data from 37 states revealed a variety of methods employed in identifying statewide training needs.

Many of the states used more than one method to determine inservice training needs. The most prevalent means were to identify needs through analysis of data located in existing records and by conducting surveys. Twenty-two states reported seven different types of existing records that they use in determining training needs. Twenty-two states reported doing a survey to assess needs. Such surveys typically involved the administration of a questionnaire to a statewide sample of personnel. States also sought the judgment of individuals in identifying inservice training needs, and some states used advisory groups and task forces for this purpose. Some conducted open forums, while others relied on informal feedback from individuals. Nine states mentioned

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<sup>18</sup>Sharon Davis, A Review of Selected Inservice Training Components of States' 1978-79 Annual Program Plans (Reston, Virginia: The Council for Exceptional Children, 1979).

needs assessment methods that may be categorized as observation and interaction. That is, by observing educators in the classroom during inservice training and in classrooms, much can be learned about inservice training needs.

### Overview and Discussion

A variety of needs assessment activities are used by states, national organizations, and various projects to determine inservice training needs of teachers. Most widely used is the survey instrument. However, such instruments usually reflect some kind of bias in the designers, thereby restricting somewhat the kind of response that can be made. A ready-made list of topics from which to choose does not mean that a free choice has been made; a number of needs may have been left out of the list. Even if the respondents are offered the opportunity to express their own views through open-ended questions on another part of the questionnaire, many will tend to respond only to the available choices, thus failing to identify their own needs. Data collection should involve multiple processes which offer a greater opportunity for a fuller range of needs to be expressed.

Many of the methods of determining training needs are implemented informally when it comes to data collection and documentation. Needed are formal measurement procedures for collecting the opinions of experts as well as teachers involved in the classroom.



The national Task Force on Training Needs Assessment established by the National Inservice Network has provided considerable assistance to the field concerning needs assessment. Working in collaboration with the Council for Exceptional Children's Needs Assessment Project, the task force has made visits to various inservice programs to observe good practices in needs assessment, some of which have been reported in this review. The Council for Exceptional Children's own Needs Assessment Project is designed to assist inservice planners and providers at the local, state, and national level in order to improve their practices with regard to needs assessment. The project has developed a one-day workshop on how to conduct a needs assessment. This Needs Assessment Workshop was piloted at the 1980 Council for Exceptional Children Annual Convention and is currently available for use in other sites.<sup>19</sup>

Needs assessment may function as part of a program's evaluation process and can be used to justify requests for funds, services, or materials. Needs assessment serves as the basis for prioritizing training needs. Unless needs are identified accurately, how much and what kind of inservice training are required will go largely undetermined. The needs assessment efforts described in this chapter play a vital role in that determination.

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<sup>19</sup>Davis, Inservice Training, p. 74.

## CHAPTER IV

## METHODOLOGY AND ANALYSIS OF THE DATA

MethodologyGeneral Concept

The problem of the study was to investigate the procedures used to determine inservice training needs for educators as a result of Public Law 94-142. Specifically, the study sought to determine the needs assessment procedures employed by a sample of directors of special education from the North Carolina public schools system. Eight questions were to be answered. Data were collected from the sample relating to the process of determining inservice training needs in special education.

Population Design for the Study

Data were collected from school systems located in the state of North Carolina. The 1977-1978 Educational Directory for the Public School System of North Carolina listed 145 public school administrative units functioning within the eight educational districts of North Carolina.<sup>1</sup> Of these, one hundred were county units, and the remaining

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<sup>1</sup>Educational Directory, 1980-81 (Raleigh, North Carolina: State Department of Public Instruction, 1981).

forty-five were city administrative units. Each administrative unit included one school board, one superintendent, and sufficient elementary and secondary schools to support the student enrollment.<sup>2</sup>

#### Selection Process for the Administrative Units

Two criteria were operative in selecting an administrative unit for the research: (1) school administrative units must be legally organized and employ a superintendent or some designated chief administrator who is responsible directly to the school board, and (2) the mandates of North Carolina must be complied with regarding school board constituency, with one member of the school board being designated as chairperson or in an appropriate position of authority in order to act officially as presiding officer. Excluded from this study were private and parochial schools and schools within the community college system. The selection followed a model developed by Dr. Henry Grill in his study on North Carolina superintendencies.

Thirty-two percent or forty-six administrative units were randomly chosen. As shown in Table 1, each unit was classified as to type of unit (county or city) and student population. The random selection yielded thirty-one county units and fifteen city units. It was felt that these units

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<sup>2</sup>North Carolina, Public School Laws, Sec. 115-3 (1976).

would provide access to representative cross-sections of socioeconomic and student populations.

### Developing the Questionnaire

The questionnaire was developed from a review of the related literature. The instrument was designed to collect opinions concerning the needs assessment process of local school systems as perceived by the directors of special education. Guidelines and criteria for the construction of the questionnaire were based on a national needs assessment study conducted by the Council for Exceptional Children and on the work of the Evaluation Consortium in Charlottesville, Virginia.<sup>3</sup>

The questionnaire consisted of fourteen items. The first six items sought information on the type of administrative unit in which the director worked; the size of the school district; the type of needs assessment used in the school system; who is involved in conducting needs assessments; whether critiques of needs assessment are conducted, either orally or written; and whether written reports on needs assessment are on file in the Department of Special Services for a school district. Items

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<sup>3</sup>Sharon Davis et al., Exceptional Child Education Report: Needs Assessment for Inservice Education (Reston, Virginia: Council for Exceptional Children, 1980), pp. 54-55; Robert Covert, "Guidelines and Criteria for Constructing Questionnaires" (Charlottesville: University of Virginia, 1977), pp. 87-92.

Table 1

## School Systems and Student Population Count

Student Enrollment	Student Population	Total Units	Type of Unit		No. Selected		Alternates*
			County	City	County	City	
Under 5,001	195,645	63	33	30	10	9	2
5,001-10,000	374,478	51	40	11	12	4	2
10,000-20,000	298,420	22	19**	3	6	4	2
20,001-30,000	103,034	4	3	1	1	1	1
Over 30,000	262,292	5	5	-	2	-	1
Total	1,233,869	145	100	45	31	31	7

\*Alternates are included within random selection (not separately).

\*\*Investigator's county was omitted from random selection.

seven and eight ask the director to indicate whether the needs assessment procedure he or she is connected with has improved the department's and the director's competency in a number of areas related to needs assessment procedures. Item nine does the same but with respect to financial management specifically. Item ten asks the directors to indicate whether or not needs assessment procedures used in their school district have improved their competency in a number of instructional areas. Item eleven asks the director to indicate whether or not the needs assessment procedure in his or her district has provided inservice training in a number of specific areas. Items twelve and thirteen ask the directors to indicate whether they feel that their needs assessment procedures are necessary for the improvement of inservice training, and whether they feel that these procedures will make a significant contribution toward the quality of inservice training provided. Item fourteen asks the respondents to make additional comments if they wish.

Responses to the questionnaire items were in terms of the directors' own perceptions. They were asked to check one of five alternatives after each statement: strongly agree, agree, undecided, disagree, and strongly disagree. The respondents were informed that the study was concerned only with the combined responses of a number of directors, and that their responses would be kept confidential.

Eight directors of special education selected from the North Carolina public school system were asked to review and evaluate the contents of the proposed questionnaire and to recommend changes, if any, to the investigators. The issue of positive response bias format was evaluated by this review group, which recommended that the bias remain in the interest of clarity and consistent response on the part of their peers. On the basis of this field test, the questionnaire was revised to include the suggested changes. The questionnaire in final form is shown in Appendix A.

#### Administration of the Questionnaire

The questionnaire, a letter of introduction (Appendix B), and an addressed postage-paid return envelope were distributed by mail to the selected directors. The participants were asked to fill out the questionnaire according to the instructions provided and to return it by a specific date to the researcher. A follow-up letter (Appendix C) with another questionnaire and return envelope was mailed to those who had not returned their responses by the date specified originally, emphasizing the need for their responses.

#### Analysis of the Data

The questionnaire data collected represented opinions of directors of special education in the North

Carolina public school system. Thirty-five or seventy-six percent of the forty-six directors in the study returned the questionnaire.

#### Demographic Data

The first six items on the questionnaire provided essentially demographic data. Responses to item one indicated that twenty-two (63%) of the directors functioned in county units and twelve (34%) functioned in city units. One director (3%) reported that his was both a county and city unit.

Item two of the questionnaire indicated the size of the school districts involved in the study. Fifteen school districts (43%) had fewer than 5,001 students, fifteen (43%) had between 5,001 and 10,000 students; three (8%) had between 10,001 and 20,000 students; one (3%) had between 20,001 and 30,000 students; and one (3%) had over 30,000 students.

Responses to item three indicated the type of needs assessment conducted in a given school system. Nineteen school districts (54%) reported having formal needs assessment surveys distributed to teachers; fifteen (43%) reported having formal assessment based on discussion with teachers; two (6%) reported having outside evaluation consultants; one (3%) reported no needs assessment; and three (8%) reported other types of needs assessment: informal



done by coordinator and the special education teacher, and needs assessment in process of being developed. (It should be noted that the percentages add up to more than one hundred because five respondents registered responses in two categories.)

Item four asked when the needs assessments in the school districts are conducted, or more precisely, who are the participants when they are conducted. Twenty-one districts (60%) reported having needs assessments at regular staff meetings with teachers; five (14%) reported that these took place at supervisory meetings; ten (28%) reported having needs assessment at specially designated sessions; and 6 (17%) reported other times and by other means (at the individual school faculty meeting, through distribution of surveys to schools, and informal interviews). (Since a number of individuals responded to more than just one category on this item, the percentages reported here are somewhat higher than one hundred.)

With regard to the fifth item, critique of needs assessments conducted, only one (3%) respondent said that such critiques were never made; fifteen (43%) that they were made orally; six (17%) that they were in written form; and thirteen (37%) that they were both oral and written.

The sixth and final demographic item asked whether written reports on needs assessments are on file in the

respondent's Department of Special Services. Nineteen (54%) indicated yes, twelve (34%) said no, and four (12%) that they did not know.

#### Summary of School System Size and Needs Assessment Methods

Committee members recommended that comparative data be developed to reflect any correlations between school system size and the use of a formal needs assessment rather than more informal means of determining inservice needs. Table 2 indicates that there was no correlation between larger systems and the use of formal needs assessments. Therefore, the use of more formal means of determining inservice needs was not restricted to systems of a particular population grouping but was used throughout the range of system sizes.

#### Summary of Directors' Responses to Needs Assessment Items and Related Topics

Table 3 is a summary of how the thirty-five directors of the study sample responded to the twenty-nine needs assessment topics listed under items seven through thirteen of the questionnaire. Responses are summarized in the table under five categories: strongly agree, agree, undecided, disagree, and strongly disagree.

For the purpose of evaluating the total group (N = 35) response to these topics, a mean sample response

Table 2

## Summary of School System Size and Needs Assessment Methods

System Size by Student Enrollment		Formal Needs Assessment Surveys	Formal Needs Assessment Based on Dis- cussion	Outside Evaluation Consultants	No Needs Assess- ment
Under 5,001	15 systems	7	8	1	
5,001-10,000	15 systems	8	5		
10,001-20,000	3 systems	2	1	1	1
20,001-30,000	1 system	1			
Over 30,000	1 system	1	1	1	
Total Responses		19	15	3	1

was computed for each of the twenty-nine topics and each of the seven items. First, each category of response was assigned a weight on a scale of 1 to 5 as follows: strongly disagree (1); disagree (2); undecided (3); agree (4); strongly agree (5), and the group mean score for each topic was computed. Second, for each of the seven items these mean topic scores were averaged to obtain a mean item score. These mean individual topic scores and the mean item scores are summarized in Table 4 for the purpose of evaluating the eight research questions posed by the study.

#### Analysis of Directors' Responses to the Needs Assessment Items and Topics

Item seven. The data in Table 3 show that for item seven, the vast majority of the thirty-five directors of special education either agreed or strongly agreed that the needs assessment procedure used by their respective school system's Department of Special Education improved that department's ability with respect to nine specific topics. In the category of agreement (agree or strongly agree) were ninety-seven percent (34) of the directors with respect to planning more effectively; eighty-six percent (30) with respect to establishing lines of responsibility for needs assessment; eighty percent (28) with respect to making prompt, sound decisions;

ninety-one percent (32) with respect to recognizing and correcting the needs of those working with special needs teachers; eighty-seven percent (28) with respect to coordinating system resources; sixty-three percent (22) with respect to originating new approaches to problems; eighty-nine percent (31) with respect to developing two-way communication with staff; ninety-one percent (32) with respect to developing and maintaining future plans; and eighty-nine percent (31) with respect to providing professional growth for a staff and school personnel.

The data shown in Table 4 indicate that the mean topic score for the thirty-five directors ranged from 3.7 to 4.3 for item seven, with the item mean score for all nine topics in that item being 4.1. This item mean score of 4.1 indicates that for all nine topics as a whole, the directors as a group were in agreement that the needs assessment procedure in their respective school system's Department of Special Education had improved their department's competence. Arranged in order of most improvement in competence to least improvement, the topics were planning more effectively (4.3); recognizing and correcting the needs of those working with special needs teachers (4.2); developing and maintaining future plans (4.2); providing professional growth for staff and school personnel (4.2); developing two-way communication with staff (4.1); establishing lines of

responsibility for needs assessment (4.1); coordinating system resources (4.0); making prompt, sound decisions (3.9); and originating new approaches to problems (3.7).

The data in Table 3 and Table 4 show that on the whole directors of special education favor their needs assessment procedures' educative value for staff. The only low score that might merit special attention is the 3.7 for originating new approaches to problems. Table 3 indicates that nine directors were uncertain and four actually disagreed that their school system's approach to needs assessment helped to teach them how to develop new approaches to needs assessment.

Item eight. The data in Table 3 show mixed results for the five topics addressed in item eight. The item sought to ascertain the extent to which individual competency of the local directors had been improved by the needs assessment procedure in their respective school districts. Ninety-one percent (32) of the directors thought that the needs assessment procedure employed in their school system had improved their understanding of the needs of the special education program. Ninety-one percent (32) thought that there had been improvement in their ability to coordinate staff and resources in curriculum development and improvement. Seventy-four percent (26) felt that they

Table 3

Summary of Director's Responses to Needs Assessment Process

Statement	Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree
<u>Item seven.</u> The needs assessment procedure used by your school system's Department of Special Education has improved the Department's ability to:					
a. Plan more effectively. . . . .	11	23	1	-	-
b. Establish lines of responsibility for needs assessment. . . . .	8	22	5	-	-
c. Make prompt sound decisions. . .	4	24	6	1	-
d. Recognize and correct the needs of those working with special needs teachers . . . . .	9	23	3	-	-
e. Coordinate system resources. . .	9	19	6	1	-
f. Originate new approaches to problems . . . . .	5	17	9	4	-
g. Develop two-way communication with staff . . . . .	10	21	-	4	-
h. Develop and maintain future plans	11	21	3	-	-
i. Provide professional growth for staff and school personnel . . .	12	19	4	-	-

Table 3 (continued)

Statement	Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree
<u>Item Eight.</u> The needs assessment procedure used in your local school system has improved the competency of the Local Director in:					
a. Improving the Local Director's understanding of the needs of the Special Education Program. . . .	9	23	2	1	-
b. Coordinating staff and resources in curriculum development and improvement. . . . .	11	21	1	2	-
c. Implementing the Special Education Department's philosophy of education. . . . .	7	19	8	1	-
d. Determining the educational needs of the community relating to special needs children . . . . .	3	16	14	2	-
e. Organizing an evaluative system for programs and personnel in special education. . . . .	2	16	16	1	-



Table 3 (continued)

Statement	Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree
<u>Item Nine.</u> The needs assessment procedure used in the Department of Special Education has improved competency in financial management in the following ways:					
a. Keeping abreast of legislation and regulations relating to inservice training. . . . .	4	21	7	3	-
b. Organizing structure for inservice budget preparation. . .	7	21	3	4	-
c. Evaluating financial needs for inservice training and making recommendations to the Superintendent and Board . . . . .	6	26	3	-	-
d. Organizing a structure for appropriate spending, controlling, and accounting for monies spent on inservice for program needs . .	6	28	6	1	1

Table 3 (continued)

Statement	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
<u>Item Ten.</u> The needs assessment procedure used in the Department of Special Education has improved competency in relating to other instructional areas as follows:					
a. Gaining respect and support of instructional supervisors. . . . .	2	20	13	-	-
b. Participation in the system-wide inservice training. . . . .	5	25	3	2	-
c. Interpreting special programs to other instructional supervisors and personnel . . . . .	7	21	7	-	-
d. Working effectively with public and private agencies . . . . .	-	15	14	6	-

Table 3 (continued)

Statement	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
<u>Item Eleven.</u> The needs assessment procedure has involved providing inservice for the following:					
a. Special needs teachers directly involved with special needs students . . . . .	14	20	-	1	-
b. Regular classroom teachers involved with special needs students. . . . .	10	22	-	1	-
c. Support personnel involved with special needs students, i.e., guidance counselors and reading coordinators . . . . .	8	23	2	2	-
d. Special Education Citizens' Advisory Councils. . . . .	-	10	12	12	1
e. Instructional and administrative personnel. . . . .	2	30	3	-	-
f. Parents and advocacy groups. . .	2	12	10	9	2

Table 3 (continued)

Statement	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
<u>Item Twelve.</u> The needs assessment procedure, as designed, is necessary for the improvement of provision of inservice training. . . . .	9	24	2	-	-
<u>Item Thirteen.</u> The needs assessment procedure, as designed, will make a significant contribution toward the quality of inservice training provided. . . . .	6	23	6	-	-

Table 4

Summary of Mean Topic Scores and Mean Item Scores

Item Seven. The needs assessment procedure used by your school system's Department of Special Education has improved the Department's ability to:

<u>Topics</u>	<u>Mean Topic Score (N = 35)</u>
a. Plan more effectively. . . . .	4.3
b. Establish lines of responsibility for needs assessment . . . . .	4.1
c. Make prompt, sound decisions . . . . .	3.9
d. Recognize and correct the needs of those working with special needs teachers. . . . .	4.2
e. Coordinate system resources . . . . .	4.0
f. Originate new approaches to problems . . . . .	3.7
g. Develop two-way communication with staff . . . . .	4.1
h. Develop and maintain future plans. . . . .	4.2
i. Provide professional growth for staff and school personnel . . . . .	4.2
Item Mean Score (N = 9)	4.1

Table 4 (continued)

Item Eight. The needs assessment procedure used in your local school system has improved the competency of the Local Director in:

<u>Topics</u>	<u>Mean Topic Score (N = 35)</u>
a. Improving the Local Director's understanding of the needs of the Special Education Program. . . . .	4.1
b. Coordinating staff and resources in curriculum development and improvement . . . . .	4.2
c. Implementing the Special Education Department's philosophy of education . . . . .	3.9
d. Determining the educational needs of the community relating the special needs children . . . . .	3.6
e. Organizing an evaluative system for programs and personnel in special education . . . . .	3.5
Item Mean Score (N = 5)	3.9

Table 4 (continued)

Item Nine. The needs assessment procedure used in the Department of Special Education has improved competency in financial management in the following ways:

<u>Topics</u>	<u>Mean Topic Score (N = 35)</u>
a. Keeping abreast of legislation and regulations relating to inservice training . . . . .	3.7
b. Organizing structure for inservice budget preparation . . . . .	3.9
c. Evaluating financial needs for inservice training and making recommendations to the Superintendent and Board . . . . .	4.1
d. Organizing a structure for appropriate spending, controlling, and accounting for monies spent on inservice for program needs . . . . .	3.9
Item Mean Score (N = 4)	3.9

Table 4 (continued)

Item Ten. The needs assessment procedure used in the Department of Special Education has improved competency in relating to other instructional areas as follows:

<u>Topics</u>	<u>Mean Topic Score (N = 35)</u>
a. Gaining respect and support of instructional supervisors . . . . .	3.7
b. Participation in system-wide inservice training . . . . .	3.9
c. Interpreting special programs to other instructional supervisors and personnel . . . . .	4.0
d. Working effectively with public and private agencies . . . . .	3.3
Item Mean Score (N = 4)	3.7



Table 4 (continued)

Item Eleven. The needs assessment procedure has involved providing inservice for the following:

<u>Topics</u>	<u>Mean Topic Score (N = 35)</u>
a. Special needs teachers directly involved with special needs students. . . . .	4.5
b. Regular classroom teachers involved with special needs students . . . . .	4.2
c. Support personnel involved with special needs students, i.e., guidance counselors and reading coordinators. . . . .	4.1
d. Special Education Citizen's Advisory Councils. . . . .	2.9
e. Instructional and administrative personnel . . . . .	4.0
f. Parents and advocacy groups . . . . .	3.1
Item Mean Score (N = 6)	3.8

Table 4 (continued)

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Item Twelve. The needs assessment procedure, as designed, is necessary for the improvement of provision of inservice training.

Item Mean Score (N = 35) 4.2

Item Thirteen. The needs assessment procedure, as designed, will make a significant contribution toward the quality of inservice training provided.

Item Mean Score (N = 35) 4.0

had improved in their ability to implement the special education department's philosophy of education.

However, with respect to their competency in determining the educational needs of the community relating to special needs children, only fifty-four percent (19) felt that their competency had been improved. Fourteen were undecided and two disagreed as to their improvement on this topic. With respect to the directors' competency in organizing an evaluative system for programs and personnel in special education, only fifty-one percent (18) felt that their competency had improved. Sixteen of the directors were undecided and one disagreed as to his improvement on this topic.

The data in Table 4 indicate that the mean topic scores for the thirty-five directors ranged from 3.5 to 4.2 for item 8, with the item mean score for all five topics being 3.9. This item mean score is just slightly below the agreement (4.0) level, and thereby indicates that, for all five topics as a whole, the directors as a group were in fairly good agreement that the needs assessment procedure in their respective school system's department of special education had improved their competency with respect to the five topics listed. Arranged in order of most improvement in personal competence to least improvement, the topics were coordinating staff and resources in curriculum development and improvement (4.2); improving

the local director's understanding of the needs of the special education program (4.1); implementing the special education department's philosophy of education (3.9); determining the educational needs of the community relating to special needs children (3.6); and organizing an evaluative system for programs and personnel in special education (3.5). The mean topic scores of 3.6 and 3.5 for the last two topics, respectively, indicate that the directors as a group were only halfway between indecision and agreement with respect to these two topics.

The data in Table 3 and Table 4 indicate that the directors as a group felt that the needs assessment procedure used in their respective school systems had improved their competency in three topics: improving their understanding of the needs of the special education program; coordinating staff and resources in curriculum development and improvement; and implementing the special education department's philosophy of education. However, this was not the case with the two topics of determining the educational needs of the community relating to special needs children, and organizing an evaluative system for programs and personnel in special education. At least fourteen directors were undecided on each of these two topics.

Item nine. The data in Table 3 indicate that for item nine, a decided majority of the thirty-five directors of special education either agreed or strongly agreed that the needs assessment procedure used in their respective department of special education had improved their competency in financial management in four ways. Seventy-one percent (25) of the directors sampled thought that the needs assessment procedure used by their respective department of special education had improved their competency in keeping abreast of legislation and regulations relating to inservice training. Eighty percent (28) thought they had improved in their competency for organizing structures for inservice budget preparation. Ninety-one percent (32) felt improvement in evaluating financial needs for inservice training and making recommendations to the superintendent and Board. Finally, eighty percent (28) were of the opinion that they had improved in their ability to organize a structure for appropriate spending, controlling, and accounting for monies spent on inservice for program needs.

The data in Table 4 show that the mean topic scores for the thirty-five directors ranged from 3.7 to 4.1 for item nine, with an item mean score of 3.9 for all four topics. This item mean score is just slightly below the agreement (4.0) level, and thereby indicates that, for all four topics as a whole, the directors as a

group were in agreement that the needs assessment procedure in their respective school system's department of special education had improved their competency in the four topics listed. Arranged in order of most improvement in personal competence to least improvement, the topics were evaluating financial needs for inservice training and making recommendations to the superintendent and board (4.1); organizing a structure for appropriate spending, controlling, and accounting for monies spent on inservice for program needs (3.9); and keeping abreast of legislation and regulations relating to inservice training (3.7).

The data in Table 3 and Table 4 indicate that the directors as a group felt that the needs assessment procedure used in their respective school systems had improved their competency in financial management with regard to all four of the topics listed. Only three directors disagreed that they had improved in their competency to keep abreast of legislation and regulations relating to inservice training, and only four disagreed that they had improved in organizing structure for inservice budget preparation. These few exceptions were not sufficiently large in number to suggest any significant exception to the overall trend of improved competency with reference to the four topics listed.

Item ten. The data in Table 3 show mixed results for the four topics addressed in item ten, which sought to

ascertain whether or not the needs assessment procedure used in the directors' respective department of special education had improved their competency in relating to other instructional areas. Eighty-six percent (30) of the directors felt that the needs assessment procedure employed in their school system had improved their competency in participating in systemwide inservice training. Eighty percent (28) of the directors thought that there had been improvement in their ability to interpret special programs to other instructional supervisors and personnel.

However, with respect to their competency in gaining respect and support of instructional supervisors, only sixty-three percent (22) felt that their competency had been improved. Thirteen of the directors were undecided on this topic. With respect to their competency to work effectively with public and private agencies, only forty-three percent (15) agreed that they had improved in their ability to work effectively with public and private agencies. None of the directors strongly agreed on this topic, with fourteen being uncertain and six in disagreement that their competency had improved.

The data in Table 4 indicate that the mean topic scores for the thirty-five directors ranged from 3.3 to 4.0 for item ten, with an item mean score of 3.7 for all four topics. This item mean score, while well above the undecided category, is not sufficiently close to 4.0 to

warrant the conclusion that the directors on the whole were in agreement with the four topics listed under item ten. Arranged in order of most improvement in personal competence to least improvement, the topics are interpreting special programs to other instructional supervisors and personnel (4.0); participation in system-wide inservice training (3.9); gaining respect and support of instructional supervisors (3.7); and working effectively with public and private agencies (3.3).

The data in Table 3 and Table 4 indicate that the directors as a group felt that the needs assessment procedure of their respective department of special education had improved their competency only on two topics: interpreting special programs to other instructional supervisors and personnel, and participation in system-wide inservice training. With regard to the other two topics of item ten, the group of directors showed only mild agreement that their competency had improved in gaining respect and support of instructional supervisors, and clear uncertainty and disagreement (fifty-seven percent) that their competency had improved with regard to working effectively with public and private agencies.

Item eleven. The data in Table 3 with regard to item eleven reveal the extent to which the needs assessment procedures in the school systems of the thirty-five directors provided inservice training for six areas.



Ninety-seven percent (34) of the directors agreed that inservice training was provided for special needs teachers directly involved with special needs students. Ninety-one percent (32) felt that inservice training was provided for regular classroom teachers involved with special needs students. Eighty-nine percent (31) were of the opinion that inservice was being provided for support personnel involved with special needs students (guidance counselors and reading coordinators). Ninety-two percent (32) indicated that inservice was being provided for instructional and administrative personnel.

However, there were two areas in which the directors did not feel that inservice training was being adequately provided. Only twenty-nine percent (10) felt that inservice was being provided for special education citizens' advisory councils. Twelve of the directors were uncertain on this topic and twelve disagreed that inservice was being provided. Only forty percent (14) felt that inservice was being provided for parents and advocacy groups. Ten directors were uncertain on this topic and nine disagreed that inservice was being provided.

The data in Table 4 indicate that the mean topic scores for the thirty-five directors range from 2.9 to 4.5 for item eleven, with an item mean score of 3.8 for all six topics. The significance of this 3.8 mean item score is better seen by noting that for four of the six

topics, the mean topic score was over 4.0, while for the remaining two it was well below 4.0. Arranged in order of those areas receiving most inservice to those receiving the least, the topics are special needs teachers directly involved with special needs students (4.5); regular classroom teachers involved with special needs students (4.2); support personnel involved with special needs students (guidance counselors and reading coordinators) (4.1); instructional and administrative personnel (4.0); parents and advocacy groups (3.1); and special education citizens' advisory councils (2.9).

The data in Table 3 and Table 4 indicate that the directors were in definite agreement that inservice had been provided for four areas: special needs teachers directly involved with special needs students; regular classroom teachers involved with special needs students; support personnel involved with special needs students (guidance counselors and reading coordinators); and instructional and administrative personnel. However, they were in equally sharp agreement that inservice training had not been provided for special education citizens' advisory councils and for parents and advocacy groups.

Item twelve. The data in Table 3 with regard to item twelve indicate the extent to which the thirty-five directors felt that the needs assessment procedure, as designed in their respective school systems, is necessary

for the improvement of provision of inservice training. Ninety-four percent (33) of the directors agreed that such is the case, with only six percent (2) being uncertain. The data in Table 4 for item 12 show an item mean score of 4.2. The data in Table 3 and Table 4 indicate that the directors were very much in agreement that their school system's needs assessment procedures are necessary for the improvement of the provision of inservice training.

Item thirteen. The data in Table 3 with regard to item thirteen show the extent to which the thirty-five directors felt that the needs assessment procedure, as designed in their respective school systems, will make a significant contribution toward the quality of inservice training provided. Eighty-three percent (29) of the directors agreed such is the case, with only seventeen percent (6) being uncertain. The data in Table 4 for item thirteen show an item mean score of 4.0. The data in Table 3 and Table 4 indicate that the directors were in strong agreement that their school systems' needs assessment procedures will make a significant contribution toward the quality of inservice training provided.

#### Application of Questionnaire Results to the Eight Research Questions

On the basis of the questionnaire responses provided by the sample of thirty-five directors of special

education from the North Carolina public school system, the eight research questions posed by the study were answered as follows:

1. What means are currently being utilized to determine inservice training needs?

The most prevalent means of determining inservice training needs in the public schools of the state of North Carolina is having formal needs assessment surveys distributed to teachers. Nineteen school districts (54%) employed this means.

The second most prevalent means is having formal assessment based on discussion with teachers. Fifteen school districts (43%) employed this means.

Of the remaining alternative means, one (3%) reported no needs assessment and three (8%) reported that needs assessment was informal, or done by coordinator and the special education teacher, or in the process of being developed.

2. Who is primarily responsible for insuring that inservice needs are determined and met?

A basic assumption of the questionnaire was that the local directors of exceptional children's programs were ultimately responsible for insuring that inservice needs are determined and met. Item three responses indicated that formal needs assessment surveys distributed to teachers (54%) and formal assessment based on discussions

with teachers (43%) were relied on. Item four responses indicated that needs assessments were conducted at regular staff meetings with teachers (60%) and at supervisory meetings (14%). Thus teachers and supervisors, in addition to the directors, are also responsible for insuring that inservice needs are determined and met.

3. What resources are utilized in determining inservice needs?

The thirty-five directors utilized the following resources in determining inservice needs: As formal needs assessment surveys distributed to teachers, formal assessment based on discussions with teachers, regular staff meetings with teachers, and to some extent, supervisory meetings. The responses to item five of the questionnaire indicated that ninety-seven percent of the school districts surveyed conducted written or oral critiques of needs assessments. Specifically, forty-three percent indicated that they were made orally; seventeen percent that they were in written form, and thirty-seven percent that they were both oral and written.

The various target populations and their feedback may be thought of as a kind of resource for the purpose of determining inservice needs. Item eleven responses indicated that these target populations were regular classroom teachers involved with special needs students, support personnel involved with special needs students (guidance

counselors and reading coordinators), and special needs teachers directly involved with special needs students.

4. What are the target populations for inservice training?

The responses to item eleven of the questionnaire indicated that there were, in the opinion of the directors of the study sample, four important target populations for inservice training. Listed in their decreasing order of importance for the directors, the four major target populations were special needs teachers directly involved with special needs students; regular classroom teachers involved with special needs students; support personnel involved with special needs students (guidance counselors and reading coordinators); and instructional and administrative personnel. It might be added that the directors were in agreement that inservice training had not been provided to any significant extent for special education citizens' advisory councils and for parents and advocacy groups.

5. Has assessing inservice training needs improved the competency of local directors and related personnel in planning?

Items seven and eight of the questionnaire addressed this question. Of the thirty-five directors responding, ninety-seven percent felt that the needs assessment procedure used by their school system's department of special education had improved the department's ability to plan more

effectively. Although the remaining thirteen topics dealt with under these two items do not explicitly use the term "planning," they are very much related, some more than others, with the concept and process of planning. Thus, as indicated by the mean topic score associated with each topic, the directors felt that their competency had improved in a number of planning and planning-related areas as follows: developing and maintaining future plans (4.2); coordinating system resources (4.0); establishing lines of responsibility for needs assessment (4.1); developing two-way communication with staff (4.1); recognizing and correcting the needs of those working with special needs teachers (4.2); providing professional growth for staff and school personnel (4.2); improving the local director's understanding of the needs of the special education program (4.1); and coordinating staff and resources in curriculum development and improvement (4.2).

6. Has assessing inservice training needs improved financial management for local directors?

Item nine of the questionnaire addressed this question quite specifically. The directors indicated that the needs assessment procedures used in the department of special education in their respective school districts had improved their competency in financial management in four ways. Seventy-one percent of the directors felt that their competency had improved in keeping abreast with

legislation and regulations relating to inservice training. Eighty percent of the directors indicated that they had improved their competency significantly with respect to organizing structure for inservice budget preparation. Ninety-one percent indicated that their competency had improved in evaluating financial needs for inservice training and making recommendations to the superintendent and board. Finally, eighty percent said that their competency had improved with regard to organizing a structure for appropriate spending, controlling, and accounting for monies spent on inservice for program needs.

7. Has the assessment of inservice training needs significantly affected the quality of training provided?

Item thirteen of the questionnaire addressed this question directly. It stated that the needs assessment procedure, as designed by the directors' respective districts, would make a significant contribution toward the quality of inservice training provided. Eighty-three percent (29) of the directors felt that it would, with only seventeen percent (6) being uncertain. The item mean score here was 4.0. On the basis of this item alone the question may be answered in the affirmative, with the influence being in the direction of improved quality of training as a result of needs assessment.

Items seven, eight, and ten of the questionnaire are also related to this question. The overall mean score for



item seven (the needs assessment procedure used by a school system's department of special education had improved the department's ability in four specific areas) was 4.1, a favorable indicator with regard to the quality of training provided. The overall mean score for item eight (the needs assessment procedure used by a school system had improved the competency of the indicator in five areas) was 3.9, a slightly favorable indicator, but one considerably improved if only three of the five areas are considered (the director's understanding of the needs of the special education program, coordinating staff and resources in curriculum development and improvement, and implementing the special education department's philosophy of education, the combined mean score for all three being 4.1). The overall mean score for item ten (the needs assessment procedure used by a school system had improved the director's competency in relating to four other instructional areas) was only 3.7, and therefore only mildly favorable, but considerably improved if only two of the topics are considered (interpreting special programs to other instructional supervisors and personnel, and participation in system-wide support of instructional supervisors, with a combined mean score of 4.0).

8. What factors or commonalities produce effective needs assessment procedures?

The answer to this question is indirectly obtained

by comparing responses to items three, four, and five of the questionnaire to the overall response patterns exhibited in items seven through thirteen. The responses to items three, four, and five indicated that the types of needs assessment most widely used included formal needs assessment surveys distributed to teachers, regular staff meetings with teachers, supervisory meetings, and both oral and written critiques of needs assessment. In view of the high item mean scores for items seven through thirteen, which are in effect an evaluation from various points of view of the needs assessment procedures employed by the school systems in which the thirty-five directors work, it may be concluded that these four factors common to items three, four, and five are productive of effective needs assessment procedures, at least in the opinion of the thirty-five directors of the study sample.

## CHAPTER V

## SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

The study was motivated by the necessity of meeting the training needs of educators who are responsible for implementing the Education for All Handicapped Children Act of 1975, Public Law 94-142. Public school personnel, especially directors of special-needs programs, are faced with the task of providing to instructional staff appropriate training related to the special-needs student. Providing the most appropriate training will largely depend on the quality of the needs assessment procedures employed for determining inservice training needs.

The purpose of this study was to investigate the procedures used to determine inservice training needs for educators as a result of the enactment of Public Law 94-142. The research described the extent to which federal, state, and local agencies have developed practices to determine inservice needs for compliance with federal and state legislation. Accordingly, the study reviewed current literature at the federal, state, and local levels regarding the mandate for inservice training. Of special concern for the study was the state of North Carolina. A

questionnaire survey was made of representative public education districts in North Carolina in order to ascertain the procedures utilized by them to determine inservice training needs of their special educators. The questionnaire was designed to address eight key research questions:

1. What means are currently being utilized to determine inservice training needs?
2. Who is primarily responsible for insuring that inservice needs are determined and met?
3. What resources are utilized in determining inservice needs?
4. What are the target populations for inservice training?
5. Has assessing inservice training needs improved the competency of local directors and related personnel in planning?
6. Has the assessment of inservice training needs significantly affected the quality of training provided?
7. Has the assessment of inservice training needs improved financial management for local directors?
8. What factors or commonalities produce effective needs assessment procedures?

A questionnaire, designed specifically for the purpose of answering these research questions, was distributed to the special education directors of forty-six randomly selected public school districts of the state of North

Carolina. Thirty-five of the directors (seventy-six percent) responded to the questionnaire. Based on an analysis of the questionnaire data, the eight research questions were answered as follows:

1. The most prevalent means for determining inservice training needs in the public schools of North Carolina is through having formal needs assessment surveys distributed to teachers (fifty-four percent), while the second most prevalent means is formal assessment based on discussion with teachers (forty-three percent). Of the remaining alternative means, three percent reported no needs assessment and eight percent reported such other types of needs assessment as informal, done by coordinator and the special education teacher, and in the process of being developed.

2. The basic assumption of the questionnaire was that the local directors of exceptional children's programs were ultimately responsible for insuring that inservice needs are determined and met. Inservice needs are also determined by formal needs assessment surveys distributed to teachers (fifty-four percent) and formal assessment based on discussions with teachers (forty-three percent). Sixty percent of the directors said that needs assessments were conducted at regular staff meetings with teachers, and fourteen percent said that they were conducted at supervisory meetings. Thus teachers and supervisors, in addition to the directors, to some extent, are also responsible for

insuring that inservice needs are determined and met.

3. Resources utilized in determining inservice needs include formal needs assessment surveys distributed to teachers, formal assessment based on discussions with teachers, regular staff meetings with teachers, and to some extent supervisory meetings. Ninety-seven percent of the school districts surveyed conducted written and oral critiques of needs assessments. Specifically, forty-three percent indicated that they were made orally; seventeen percent that they were made in written form; and thirty-seven percent that they were both oral and written. The various target populations and their feedback were considered to be resources for determining inservice needs, including regular classroom teachers involved with special needs students; support personnel involved with special needs students (guidance counselors and reading coordinators); and special needs teachers directly involved with special needs students.

4. The directors listed four important target populations for inservice training. In their decreasing order of importance, these were special needs teachers directly involved with special needs students; regular classroom teachers involved with special needs students; support personnel involved with special needs students (guidance counselors and reading coordinators); and instructional and administrative personnel.

5. Ninety-seven percent of the directors felt that the needs assessment procedure used by their school system's department of special education had improved the department's ability to plan more effectively. The directors as a group felt that their competency had improved significantly in the following planning and planning-related areas: developing and maintaining future plans; coordinating system resources; establishing lines of responsibility for needs assessment; developing two-way communication with staff; recognizing and correcting the needs of those working with special needs teachers; providing professional growth for staff and school personnel; improving the local director's understanding of the needs of the special education program; and coordinating staff and resources in curriculum development and improvement.

6. With regard to the improvement of their financial management competency as a result of inservice training, seventy-one percent felt that their competency had improved in keeping abreast of legislation and regulations relating to inservice training; eighty percent felt improvement in organizing structure for inservice budget preparation; ninety-one percent with respect to evaluating financial needs for inservice training and making recommendations to the superintendent and board; and, finally, eighty percent with regard to organizing a structure for appropriate spending, controlling, and accounting for monies spent on inservice for program needs.

7. Eighty-three percent of the directors felt that their needs assessment procedure would make a significant contribution toward improving the quality of inservice training provided. The directors as a group agreed that the needs assessment procedure employed in their district had improved their department's ability as well as their own in a number of specific areas of needs assessment, as well as the director's competency in relating to other instructional areas.

8. The types of needs assessment most widely used included formal needs assessment surveys distributed to teachers, formal assessment based on discussion with teachers, regular staff meetings with teachers, supervisory meetings, and both oral and written critiques of needs assessment. Questionnaire results indicated that these four factors are productive of effective needs assessment procedures in the opinions of the thirty-five directors.

### Conclusions

Based on the findings of the questionnaire survey, the following conclusions were made:

1. Directors of special education felt that their needs assessment programs significantly improved their department's ability to plan needs assessment more effectively.



2. Directors of special education felt that their needs assessment programs significantly improved their own ability to plan needs assessment more effectively.

3. Directors of special education felt that their needs assessment programs significantly improved their own financial management competence with regard to conducting needs assessment programs.

4. Directors of special education felt that their needs assessment programs contributed significantly toward the improvement of the quality of inservice training provided teachers and related personnel.

5. Directors of special education regularly rely on teacher, administrator, and support personnel input and feedback in the construction of needs assessment plans and inservice training.

6. The tendency is to rely more on survey forms distributed to teachers (fifty-four percent) than on actual direct participation and contribution by teachers (only forty-three percent) in determining inservice training needs.

7. Directors of special education relied mainly on formal surveys distributed to teachers, formal assessment based on discussion with teachers, regular staff meetings with teachers, supervisory meetings, and both oral and written critiques as major types of needs assessment procedures.

8. Over one-third of the directors felt that their district's approach to needs assessment has not been especially helpful for them for the purpose of developing creative approaches to needs assessment.

9. With regard to their ability to work effectively with public and private agencies such as special education citizens' advisory councils, directors felt a significant degree of uncertainty.

10. With regard to gaining the respect and support of instructional supervisors, there was significant uncertainty on the part of the directors.

### Recommendations

Based on the findings and conclusions of the study, a number of recommendations were made.

1. More needs assessment procedures should directly involve staff at meetings. Over half of the input from teachers in the districts studied was gained through survey data, a useful and informative procedure but nevertheless not as effective as direct involvement at staff meetings.

2. More attention needs to be given to the development of creative approaches to needs assessment. In particular, what are other modes of needs assessment that were not utilized by the directors and which might be explored for future use?

3. There should be more concern with community and public or private agencies in addressing the problem of needs assessment. The schools may find considerable assistance from noninstitutional agencies such as special education citizens' advisory councils and parents.

4. More concern should be shown with regard to gaining the respect and support of instructional supervisors in the area of needs assessment. In modern management theory there is a special emphasis on total staff participation in important decision-making processes; this might be worthy of investigation by directors of special education.

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APPENDIX A  
QUESTIONNAIRE

QUESTIONNAIRE FOR LOCAL DIRECTORS OF EXCEPTIONAL CHILDREN'S PROGRAMS

Survey of Needs Assessment Methods  
Relating to P.L. 94-142

This survey instrument has been designed to collect information on methods used to determine inservice training needs in relation to staff working with special needs students. No attempt will be made by this survey to identify the responses of any participants. The right to privacy will be respected.

PLEASE CHECK THE CATEGORY WHICH BEST DESCRIBES YOUR ORGANIZATION.

1. Type of administrative unit.

a. County                       b. City                       c. Other

2. Size of school district.

a. Under 5,001 students                       d. 20,001 to 30,000 students  
 b. 5,001 to 10,000 students                       e. Over 30,000 students  
 c. 10,001 to 20,000 students

3. Which type needs assessment best describes the one used in your school system?

a. Formal needs assessment surveys distributed to teachers  
 b. Formal assessment based on discussion with teachers  
 c. Outside evaluation consultants  
 d. No needs assessment  
 e. Other (specify) \_\_\_\_\_

4. Needs assessments are conducted.

a. At regular staff meetings with teachers  
 b. At supervisory meetings  
 c. At specially designated sessions  
 d. Other (specify) \_\_\_\_\_

5. Critique of needs assessments conducted.

- a. Never
- b. Orally
- c. Written
- d. Orally and written

6. Written report on needs assessment is on file in the Department of Special Services.

- a. Yes
- b. No
- c. Unknown

PLEASE CHECK THE COLUMN WHICH MOST CLOSELY REFLECTS YOUR OPINION.

STATEMENT	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
7. The needs assessment procedure used by the Department of Special Education has improved the Department's ability to:					
a. Plan more effectively . . . . .					
b. Establish lines responsibility for needs assessment . . . . .					
c. Make prompt sound decisions . . . . .					
d. Recognize and correct the needs of those working with special needs teachers . . . . .					

STATEMENT	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
e. Coordinate system resources . . . . .					
f. Originate new approaches to problems . . . . .					
g. Develop two-way communication with staff . . . . .					
h. Develop and maintain future plans . . . . .					
i. Provide professional growth for staff and school personnel . . . . .					
8. The needs assessment procedure used in the school system has improved the competency of the Local Director in:					
a. Improving the Local Director's understanding of the needs of the Special Education program . . . . .					
b. Coordinating staff and resources in curriculum development and improvement . . . . .					
c. Implementing the Special Education Department's philosophy of education . . . . .					
d. Determining the educational needs of the community relating to special needs child . . . . .					
e. Organizing an evaluative system for programs and personnel in special education . . . . .					

STATEMENT	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
9. The needs assessment procedure used in the Department of Special Education has improved competency in financial management in the following ways:					
a. Keeping abreast of legislative and regulations relating to inservice training . . . . .					
b. Organizing structure for inservice budget preparation . . . . .					
c. Evaluating financial needs for inservice training and making recommendations to the Superintendent and Board . . . . .					
d. Organizing a structure for appropriate spending, controlling, and accounting for monies spent on inservice for programs needs . . . . .					
10. The needs assessment procedure used in the Department of Special Education has improved competency in relating to other instructional areas as follows:					
a. Gaining respect and support of instructional supervisors . . . . .					
b. Participation in system wide inservice training . . . . .					

STATEMENT	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
c. Interpreting special program to other instructional supervisors and personnel . . . . .					
d. Working effectively with public and private agencies . . . . .					
11. The needs assessment procedure has involved providing inservice for the following:					
a. Special needs teachers directly involved with special needs students . . . . .					
b. Regular classroom teachers involved with special needs students . . . . .					
c. Support personnel involved with special needs students, i.e., guidance counselors, reading coordinators . . . . .					
d. Special Education Citizen's Advisory Councils . . . . .					
e. Instructional and administrative personnel . . . . .					
f. Parents and advocacy groups . . . . .					
12. The needs assessment procedure, as designed, is necessary for the improvement of provision of inservice training . . . . .					

STATEMENT	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
13. The needs assessment procedure, as designed, will make a significant contribution toward the quality of inservice training provided . . . . .					

14. If there are any other comments you may wish to make concerning the needs assessment procedures of Department of Special Education, please indicate below:

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15. If you would be interested in receiving a summary of this study, please provide the following information:

Name \_\_\_\_\_ Title \_\_\_\_\_ Address \_\_\_\_\_

REMINDER: MAIL QUESTIONNAIRE TO JANE F. MATTESON, WINSTON-SALEM/FORSYTH COUNTY SCHOOLS, P.O. BOX 2513, WINSTON-SALEM, NC 27102 IN THE PRE-ADDRESSED POSTAGE PAID ENVELOPE BY FRIDAY, FEBRUARY 20, 1981. THANK YOU FOR YOUR COOPERATION.

APPENDIX B

LETTER OF INTRODUCTION



THE UNIVERSITY OF NORTH CAROLINA  
AT GREENSBORO

School of Education

February 13, 1981

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Dear \_\_\_\_\_

Your school administrative unit has been selected to participate in a study of the needs assessment procedures of Directors of Special Education. This statewide study will be conducted under the supervision of Dr. Joseph E. Ryson, Professor, Graduate School of Education, The University of North Carolina at Greensboro. The purpose of the study is to collect information from Local Directors regarding the identification of inservice needs.

A questionnaire is enclosed for your perusal and completion. It should take only a few minutes to complete, and the responses received from Local Directors will not be individually identified. Your right to personal privacy will be respected. A pre-addressed postage-paid envelope is enclosed for your convenience in returning the completed questionnaire by February 20, 1981.

A summary of the study will be sent to each participant who completes and returns the questionnaire. Thanks for your participation and assistance in the completion of this study.

Sincerely yours,

Jane F. Matteson

Enclosures: Questionnaire  
Envelope

APPENDIX C

FOLLOW-UP LETTER

THE UNIVERSITY OF NORTH CAROLINA  
AT GREENSBORO

School of Education

March 7, 1982

R-E-M-I-N-D-E-R

EVALUATION PROCESS OPINIONNAIRE

HAVE YOU FORGOTTEN? If you have not completed and returned the questionnaire we sent to you recently, will you please do so now. We need your assistance and cooperation very much to help us make the study a success.

If the completed questionnaire is on its way, please disregard this evidence of our eagerness to have your responses to the statements. Another questionnaire and pre-addressed postage-paid return envelope are enclosed for your consideration.

Sincerely yours,

Jane F. Matteson

Enclosures: Questionnaire  
Envelope