



CASE STUDY

Improving Related Services through Scheduling: Joint School District No. 2 (ID)

by James C. Smith

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Improving Related Services through Scheduling: Joint School District No. 2 (ID)

Dr. Linda Clark, superintendent of Joint School District No. 2 in Boise, Idaho, had already taken aggressive action in confronting fiscal crisis in one of the lowest-spending states. Yet, the imperative of budget cuts persisted. Dr. Clark’s breakthrough was to invert the conventional wisdom of budget cuts: when directed in a careful and constructive way, the need for cuts did not necessarily have to represent a no-win proposition but could instead galvanize an examination of where things could be done differently in the service of continuous improvement and change.

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Special education was in many ways the most apt candidate for such an examination: special education costs were rising, but the achievement of students with disabilities was not increasing commensurately. No one questioned the hard work, passion, and commitment demonstrated by the district’s special education staff members. They had implemented an ambitious Response to Intervention (RTI) program and had made great strides in using data to inform and improve instruction. Nonetheless, special education students remained subject to a large and widening achievement gap that, by 10th grade, stood at almost 50 points in reading and almost 60 points in math despite the rising costs.

Dr. Clark was determined to find some solutions to these challenges. The process of inquiry led by Dr. Clark resulted in some surprising findings for the district and culminated in identifying staffing and scheduling changes that would improve services for students and would save the district approximately \$1.5 million over the next three school years.

Defining the Issues Examining Current Practice

Determined to better understand the challenge, Dr. Clark undertook a benchmarking analysis with the help of the District Management Council (DMC).

Joint School District No. 2 (Boise, ID) Fast Facts

Number of Students: **35,131 (2011-2012)**

Number of Schools: **49**

Per Pupil Spending: **\$4,820* (2011-2012)**

Total District Staff: **3,339** (2010-2011)**

**General fund expenditures per pupil in average daily attendance.*

***Total district staff is based on the most recent information certified by the state of Idaho.*

Source: Joint School District No. 2

The analysis focused equally on the academic achievement of students with special needs and on the cost-effective use of limited financial resources. In the face of budget constraints, districts have a tendency to focus on general education for savings because they assume that special education changes cannot be made. Dr. Clark saw the need to challenge this common assumption and to examine special education to try to find solutions that would serve students well. The district saw the importance of construing this review not as a way of determining good or bad, but rather as a project to move the district to the next level of performance.

An unexpected finding emerged from this benchmarking review that provided focus for how the district could create a roadmap toward continuous improvement:

Benchmarking Study Finding

The district had higher numbers of speech and language staff than other districts with similar poverty and spending levels. Specifically, the district learned that they had about three speech and language professionals for every two speech and language professionals in similar districts.

It was clear from the benchmarking study that speech and language pathologists and assistants in the district were hard-working and deeply committed to ensuring that students with special needs achieve academically, socially, and emotionally. However, discovering that the district had many more speech and language professionals than other similar districts was very surprising. Indeed, before the benchmarking research was conducted, common district wisdom had suggested just the opposite. Everyone knew or at least thought they knew that the speech and language department was understaffed. While ascertaining that the speech and language department was overstaffed was helpful in identifying the problem area, more detective work was needed. How was it possible to have such caring, hard-working staff and, at the same time, be overstaffed?

To investigate this dilemma, Dr. Clark applied a technology solution developed by DMC to record and analyze the district's speech and language professionals' schedules. Knowing exactly how each member of the speech and language department currently spends his or her time became invaluable in better understanding why the district had more speech and language staff

than other similar districts. Two additional findings helped to better understand the first finding:

Schedule Analysis—Finding No. 1

Speech and language pathologists across the nation spend about 28 hours a week with students (Exhibit 1). At Joint District No. 2, pathologists were spending only 13 hours a week with students. This meant that the district was losing three hours per day, 15 hours a week, and 540 hours per year of precious student service time for each pathologist.

Schedule Analysis—Finding No. 2

The analysis further showed that the amount of time each individual speech and language pathologist was spending with students was not fairly distributed. Some pathologists were spending more time with students than others (Exhibit 2). In fact, the pathologist spending the most time with students was providing three hours of direct service to students for every one hour provided by the pathologist spending the least amount of time with students.

Gaining this clear understanding of current scheduling inefficiencies affirmed that solving the staffing problem would require focusing on schedules. The reason that the district was overstaffed had nothing to do with the caring, hard-working pathologists and had everything to do with inefficient scheduling practices. >

EXHIBIT 1

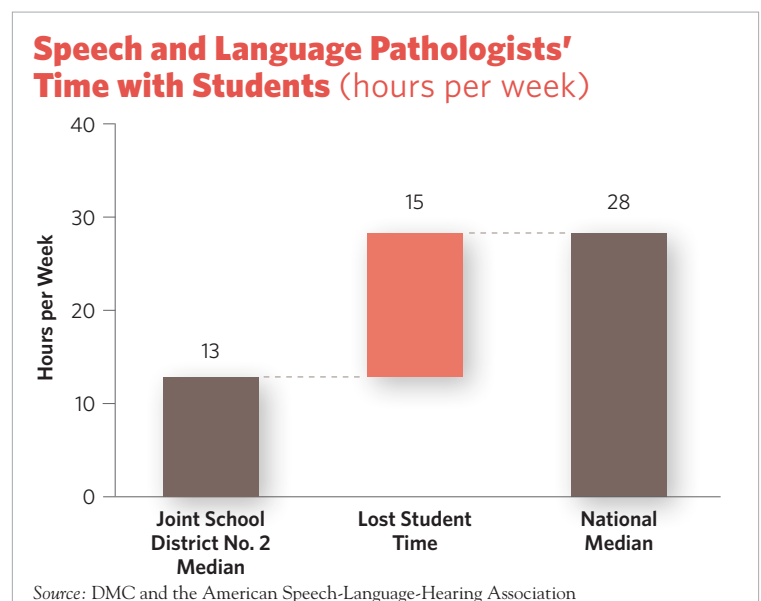
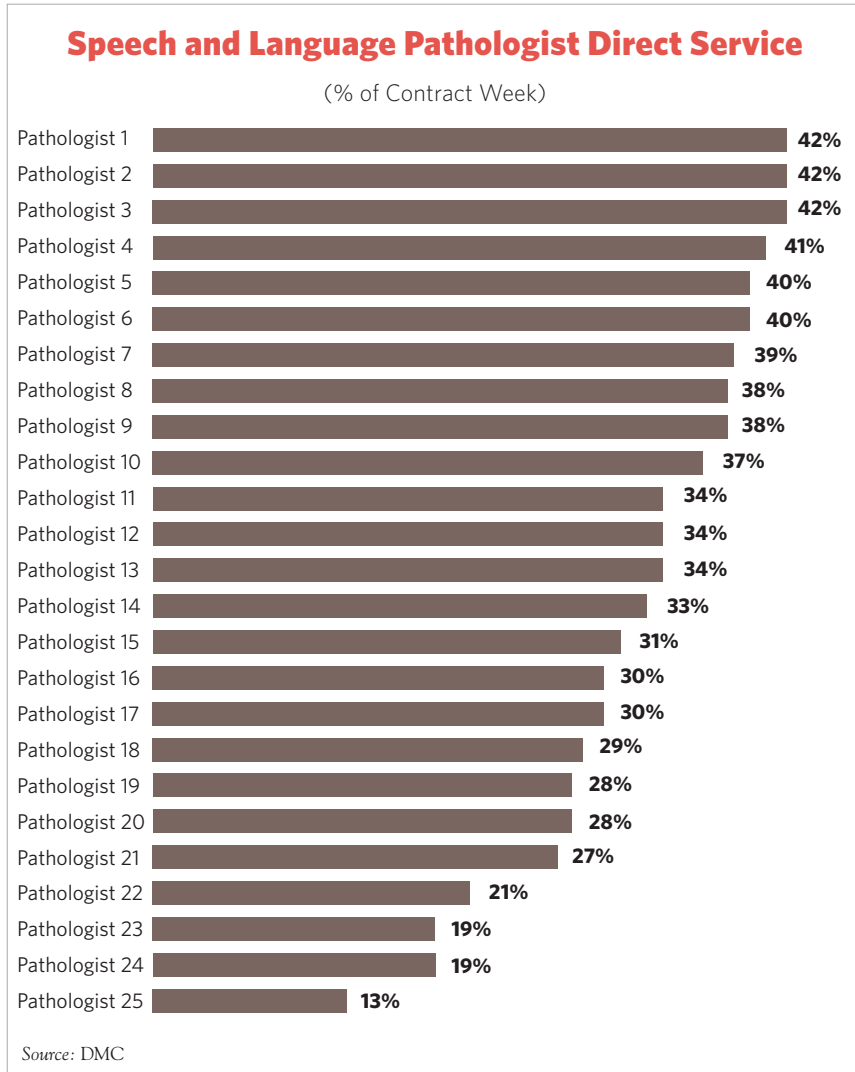


EXHIBIT 2



How Does This Happen?

This situation is, in fact, quite prevalent. There are understandable reasons that the scheduling of speech and language services eludes firm comprehension and clear tracking. In addition to spending time directly with students, speech and language professionals test students to determine services, write reports, and travel between school buildings. Further, the complexity of student needs that trigger such services and the various configurations in which these services are rendered make workloads inherently opaque. If you go to any district and ask how much time an elementary classroom teacher spends with students, central office leadership, elementary administrators, and elementary

teachers can give a quick and accurate answer. The number of elementary teachers each school needs is then a mathematical exercise that considers student enrollment by grade and the desired teacher-to-student ratio. Asking the same straightforward questions about speech and language professionals’ time and staffing, however, leads to a complex, confusing answer. Sometimes, the answer simply is not known.

Joint School District No. 2’s singular context compounded the challenge. As Idaho’s fastest-growing district, Joint School District No. 2 has seen student enrollment increase by over 50% in the last 10 years.¹ The next decade is projected to bring an additional 15,000 students to the district. As the district itself has acknowledged, “enrollment growth has placed tremendous demands on our schools.”² Getting a handle on staffing in such a dynamic setting requires stepping back and looking at a district as a whole, taking the kind of systemic perspective that Dr. Clark realized was needed.

Solutions to Improve Staffing, Scheduling, and the Delivery of Services

The benchmarking and schedule analyses clearly indicated that the district had opportunities to address scheduling and

staffing efficiencies. Perhaps even more exciting was the fact that by scheduling and staffing more strategically, services to students would improve. More efficient staffing and scheduling could ensure that students would receive more time with specialists, that more thoughtful groupings of students would take place, and that all services specified by the students’ Individualized Education Program (IEP) would be delivered.

Three Steps to Build a Better Schedule

To tackle the two connected issues of the relatively low amount of pathologist time spent with students and the variability among pathologists of hours spent with students, Dr. Clark knew that she needed to

set a service standard for speech and language professionals, determine how to enforce it consistently across the district, and employ a measured yet sustained phase-in. She realized that successful implementation of new schedules would require not only solving the technical challenge of building better schedules but also making sure that staff believed that the new schedules were fair, credible, and in the best interest of the students.

Step 1: Develop Staffing Guidelines

To set staffing guidelines, Dr. Clark looked to the leadership of Cathy Thornton, director of special programs, and Karel Olsen, supervisor of speech and language services. Tapping Ms. Thornton and Ms. Olsen for this role demonstrated Dr. Clark's confidence in their leadership abilities. Delegating the staffing guidelines to two expert professionals in the field also created confidence among staff and parents that changes would happen with thought, care, knowledge, and experience.

Ms. Thornton and Ms. Olsen made two crucial management decisions when they started to develop staffing guidelines. First, they made sure that the right people were involved in the decision, and second, they defined clear and achievable goals.

Involving the right people was critical to developing credible schedules. The committee included elementary principals, elementary classroom teachers, speech and language professionals, and other related service providers. Speech and language professionals were included because the new schedules would directly impact how they spent their day. Elementary principals and classroom teachers were included because they work with speech and language professionals to set up schedules and are impacted when students are pulled out of class for services. Other related service providers were included with the thought that if schedules could be made more efficient for speech and language professionals, all other related service providers could potentially benefit from the new scheduling approach at a later date.

Setting a clear goal was equally important to move the work forward. Developing staffing guidelines would require deciding how much time speech and language staff would spend directly serving students and when students receiving speech and language services should be grouped together. Both of these decisions could not only greatly increase scheduling efficiency but also

improve services for students. Increasing a pathologist's direct service time with students from 15 to 30 hours per week doubles efficiency. Similarly, simply grouping together two students who were previously seen one-on-one also doubles efficiency. Putting workload and grouping efficiencies together could increase efficiency fourfold. Beyond efficiency gains, students would benefit. More student time with pathologists benefits students, and grouping students more thoughtfully so that they are in groups with other students with similar needs creates greater learning opportunities.

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Setting Workload Guidelines: Caseload versus Hours Spent with Students

The committee started their discussions by agreeing that workload guidelines should be based on how much time a speech and language professional was spending directly with students and not on the size of his or her caseload. Each committee member offered stories and anecdotes that supported the perspective that each student has different needs and thus looking only at caseload size avoids the primary goal of putting students first. A better workload guideline was to set a reasonable amount of time that a speech and language professional would be expected to spend with students, being mindful of the time required to attend to other important responsibilities like testing and report writing that are done when students are not being served directly.

To determine direct service workload guidelines, the committee had to decide what to use as a benchmark. An internal benchmark involved looking at the current, actual levels of direct service provided by the staff. The committee reasoned that using an internal benchmark would ensure reasonableness: in short, the workload can be handled in the district because someone is already doing it. The external benchmark ▷

involved looking to national averages, similar communities, and expert opinions to determine what is reasonable. The external approach had the advantage of looking beyond district practice. After wrestling with the decision, an elementary principal spoke for the group in stating, “We need to look at what is possible in other districts and what is happening in our district. Using both internal and external benchmarks seems to be the best way to move forward.”

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Setting Staffing Mix and Defining Roles

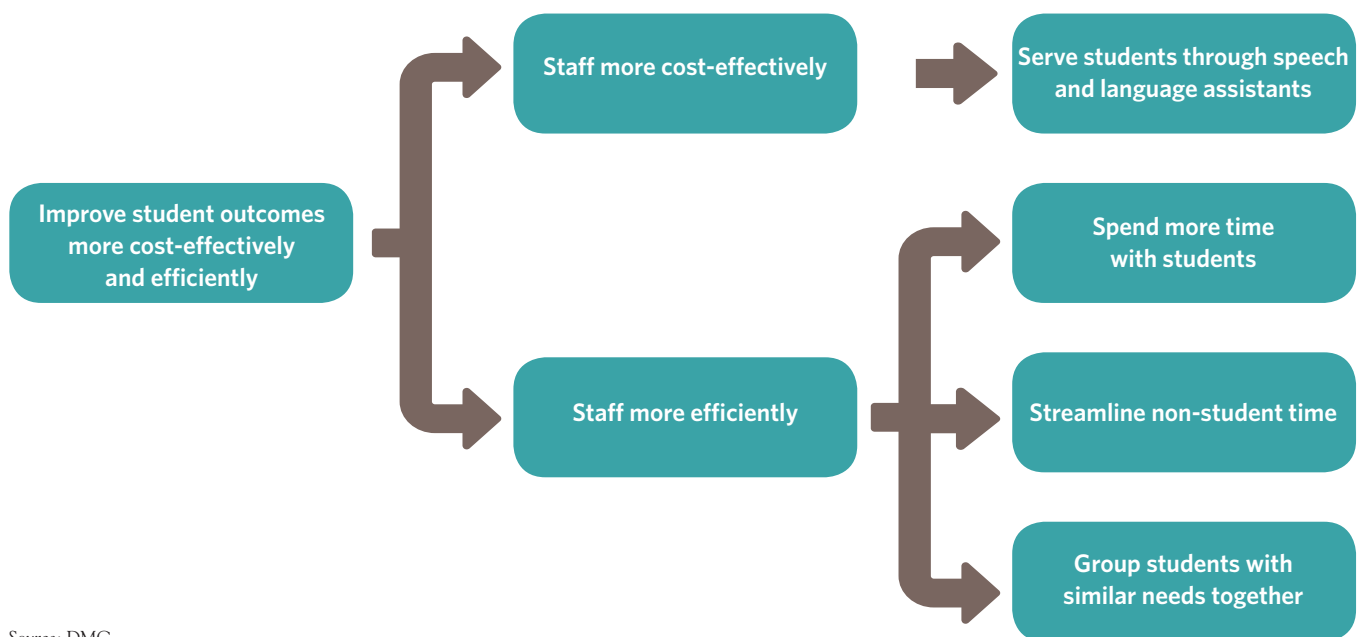
After reviewing the benchmark information, the committee decided that workload guidelines for speech

and language pathologists should differ from those for speech and language assistants because pathologists need more time to test, write reports, and conduct other activities that are important for students but that do not involve direct time spent with students. Ms. Thornton and Ms. Olsen used data from current practices to determine exactly how much time pathologists would need to test, write reports, and perform other duties. By thoughtfully accounting for all the time pathologists needed to perform activities outside of directly serving students, Ms. Thornton and Ms. Olsen were able to reach an informed expectation of the amount of time pathologists could spend with students.

The committee also started to rethink the staffing mix of speech and language pathologists and speech and language assistants. They discovered that they could continue serving students well with more assistants and fewer pathologists. From a cost perspective, this change was beneficial because pathologists received salary and benefits that were about two times greater than those of assistants. Savings could be achieved not only through improving scheduling, but in part through staffing more cost-effectively (Exhibit 3).

EXHIBIT 3

Improving Student Outcomes More Cost-Effectively and Efficiently



Source: DMC

Setting Grouping Guidelines

The committee followed a similar approach of examining both internal and external benchmarks when they set guidelines for grouping students. The speech and language practitioners' perspective proved to be the most valuable to this committee discussion. The practitioners' perspective was that students benefited from being grouped together as long as the grouping was based on the student's area of need. The committee codified this decision further by setting a maximum number of students who could be grouped together in each area of need. The committee's decisions gained quick consensus due to the credibility of the speech and language practitioners and validation by external sources and expert opinion.

Step 2: Discover What Is Possible

With staffing guidelines in place, the next step was to discover what these guidelines would mean when applied to the speech and language department's schedules. Figuring this out by hand was a daunting and time-consuming task. For help, the district used DMC's scheduling software, called dmStaffing.

With this technology, the district could set staffing and scheduling guidelines district-wide and quickly generate optimized schedules, all while ensuring full compliance with students' IEP requirements. This scheduling software would reveal how many speech and language professionals and assistants would be required. Based on the results, the district realized that they could generate schedules that were twice as efficient as the schedules that the speech and language staff had created by hand. These scheduling efficiencies were estimated to save the district approximately \$1.5 million over the next three school years (Exhibit 4). This entire savings was possible by using the criteria that the committee had developed to best serve students.

Step 3: Consider Realities and the Situation of the District

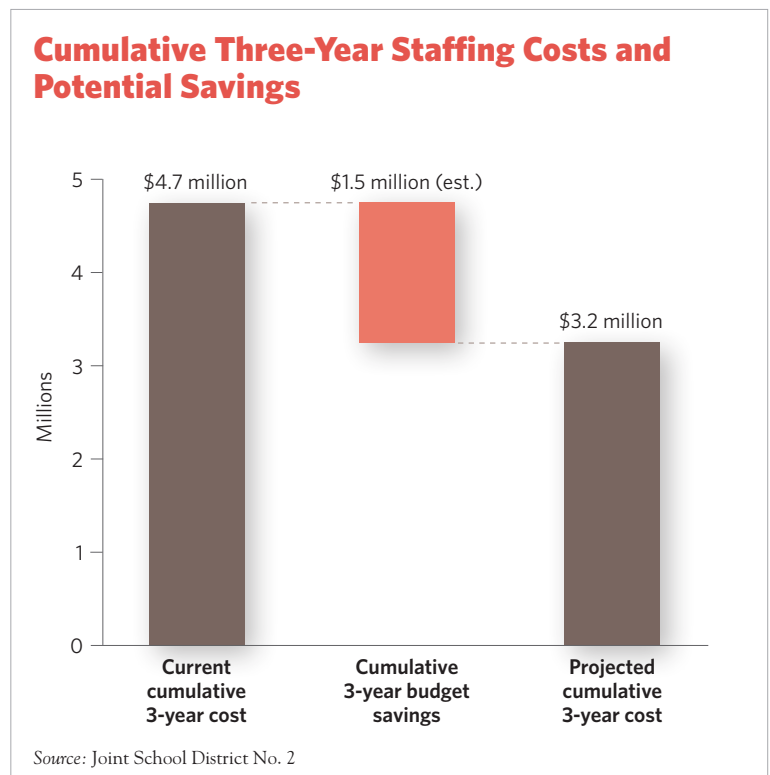
The committee's satisfaction about saving the district money and improving student outcomes quickly gave way to the realization of what the findings really meant: a significant reduction of speech and language staff. As Dr. Clark had the foresight to understand, a sudden large change in the speech and language

department, while possible on paper, would ultimately not be the right decision for students or staff.

Knowing that it was possible to generate schedules that were twice as efficient did not necessarily mean that it was wise to move forward with the decision in a single school year. The district thoughtfully decided to phase in the changes over three years to allow the speech and language department to adjust to doing their work differently. ▷

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EXHIBIT 4



Talking Points

Joint School District No. 2's work developing schedules did not happen in a vacuum. The speech and language staff wanted to know what was happening along the way. Ms. Thornton and Ms. Olsen crafted talking points to respond to staff questions thoughtfully and consistently. The talking points emphasized concerns that were on staff members' minds, such as fairness, efficiency, and timing.

- **Fairness:** "We are examining scheduling practices among all speech and language staff to ensure workload fairness from pathologist to pathologist and assistant to assistant. Moving from a caseload approach to a workload approach acknowledges that student needs are different."
- **Efficiency:** "We are looking for ways to improve our scheduling practices. Creating schedules by hand is time-consuming and complex."
- **Timing:** "There will be no scheduling changes this school year. Next school year we will use technology to help us schedule. The technology will provide draft schedules, and we will be able to rely on your professional judgment to finalize schedules."

Staff reductions are always a challenge to both the individuals who lose their positions and the staff who survive the reduction. Phasing in changes over time would allow the district to use attrition to limit the number of speech and language staff that would lose their positions. Scheduling changes would also require work to be done differently. While working differently clearly entails changes for the speech and language staff, it also impacts principals and teachers, who need to adjust to the new way of scheduling in their buildings. For the district, staffing reductions also needed to be considered within the context of the demographic changes in the area. Boise, Idaho represents an area of the country that is experiencing population growth, leading to growth in student enrollment. Joint School District No. 2 has seen student enrollment increase by over 50% in the last 10 years, with the next decade projected to bring an additional 15,000 students to the district. Phasing in changes over time allows the district to maintain a level of staffing flexibility. Dr. Clark realized the importance of making

a decision that would serve the district's students well not only during the next school year but also into the future. By not reducing staff too much or too quickly, the district is better equipped to respond to student enrollment increases over the next three years.

WHAT'S NEXT?

Over the summer, scheduling software will be rolled out district-wide to generate schedules for all of the district's speech and language staff for the 2012-2013 school year. A national first-mover in gaining such tight and comprehensive control of its staffing, Joint School District No. 2 will certainly confront unexpected findings and have to navigate practical challenges as it continues to forge new ground. Already the district has gleaned three lessons that have helped it to resolve key questions; these lessons will guide implementation going forward:

1. Scheduling will never be a one-time, entirely mechanical exercise.

Because this is the first year of implementation, the district knows it must continue to learn what works and what does not work with the new schedules and to support speech and language staff through the transition. Learning will happen through a feedback process that will provide staff opportunities to share their thoughts and perspectives about the new schedules multiple times throughout the beginning of the school year. Schedules will continue to be revised throughout the early part of the year based on practitioners' feedback. The scheduling software allows staff to tailor and make adjustments to the schedules, and using this iterative process will lead to the best schedules for students and staff.

2. New scheduling norms need to get embedded at each school.

Principals will have to play an important role in ensuring that implementation is a success. One of the reasons that speech and language staff schedules were inefficient in the past is that their services were provided at the most convenient time for the classroom teacher. More efficient scheduling will require classroom teachers to be more flexible about the time when students are pulled out of class for speech and language

services. Knowing that principals support the scheduling change will go a long way in helping pathologists to navigate these new conversations with teachers.

3. Thoughtful scheduling brings strategic abandonment.

One of the important transitions for speech and language staff is figuring out what activities *not* to do. Preliminary thinking indicates that RTI meetings are the most likely blocks of time that can be repurposed. Two possible new protocols help to illustrate the potential in this area. One would be to decree that a speech and language staff member should attend an RTI meeting only when a student he or she works with is being discussed. Additionally, rather than joining the full meeting, the speech and language staff member could attend only the critical point in the discussion when the pathologist's perspective on a student is valuable. These suggested reforms and their full implications need to be explored further. To help work through this approach comprehensively, the district is planning to conduct an observation study to make practical suggestions on determining which blocks of time not spent with students could be reduced and which could potentially be eliminated altogether.

Such outstanding strategic questions about which activities to abandon help to place the new approach to scheduling speech and language services in its proper context. The introduction of technology has not obviated the need for the nuance of human judgment. Instead, the district's review of current staffing practices and their adoption of a software solution provided the information and the tool that the district used to yield and operationalize insight. The transformation in scheduling speech and language services has been a way to more thoughtfully deploy rather than supplant the expertise of the district's professionals and their intimate knowledge of student needs.

Moving Forward

Dr. Clark boldly took on the challenge of examining special education practices, and questioned the common assumption that changes to special education are too complex to be undertaken. The somewhat surprising findings that resulted from the benchmarking study and the scheduling analysis provided elucidating

information that enabled Dr. Clark and her team to more strategically and more effectively manage special education services. Changing staffing mix, staffing more efficiently, and grouping students can result in significant cost savings for the district. And, most importantly, these efficiencies have significant benefits for students: staffing and scheduling more efficiently means that more practitioner time can be spent with

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students, groupings of students can have instructional benefits, and IEPs can be fully met as they were intended. Dr. Clark and her team's thoughtful and skillful management—engaging a committee of staff to design criteria, creating mechanisms for feedback and continuous improvement, and wisely creating time for staff to absorb the changes—is enabling the new practices to be effectively embedded into the system.

¹ Tessa Schweigert, "Managing Growth," *Idaho Issues*, Boise State University, Spring 2007, http://www.boisestate.edu/research/history/issuesonline/2007spring/p3_people_clark.html; Joint School District No. 2, <http://www.meridianschools.org/Schools/Pages/SchoolsOfOurDistrict.aspx>.

² Joint School District No. 2 website.



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