**The Need for Workload Analysis for Teachers of Students with Visual Impairments and Orientation and Mobility Specialists**

**A Position Paper of the Division on Visual Impairments and Deafblindness**

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**Purpose**

This position paper informs relevant partners about the unique roles of itinerant teachers of students with visual impairments (TSVIs) and orientation and mobility (O&M) specialists related to the requirements and expectations of their positions beyond providing direct service to students. This paper will define workload and explain how it is different from caseload and provides recommendations regarding workload analysis, rather than caseload analysis, for these educators.

**Background and Problem**

When considering staffing, allocation of students on individualized education programs (IEPs) or young children and families on individualized family service plans (IFSPs), and service provision, administrators often adopt a caseload model. In this model, administrators simply divide the number of students with visual impairments by the number of available TSVIs and O&M specialists (Meador, 2015). Importantly, such a model considers the number of students who require special education services without regard to the amount of time needed to meet those students’ needs or teachers’ other responsibilities (American Occupational Therapy Association, American Physical Therapy Association, & American Speech-Language-Hearing Association, 2014; Wilton, 2017). However, in recent years, researchers and professional organizations have encouraged administrators to adopt a workload model. Workload refers to all activities and responsibilities performed by TSVIs and O&M specialists, including, but not limited to, lesson planning, preparing unique curricular materials, adapting classroom-based materials, conducting evaluations, attending meetings, traveling between educational sites, and direct and collaborative consultation service provision (Pogrund & Cabrera-Garcia, 2023; Pogrund et al., submitted 2023; Wilton, 2017).

While the Individuals with Disabilities Education Act (IDEA) requires student placement based on need rather than convenience, the law does not offer guidance regarding the size of a teacher’s caseload or the total time of their workload (Wilton, 2017). Similarly, few states provide legal guidance for caseloads or have specific policies regarding caseload (Hogue & Taylor, 2020; Zebehazy et al., 2023). Notably, only four states offer specific guidance regarding caseloads for vision professionals (Hogue & Taylor, 2020; Zebehazy et al., 2023). These states are Georgia, Kentucky, Ohio, and Pennsylvania. Their guidance moves beyond a caseload model, considering instead how service delivery/educational setting and/or student need (e.g., multiple disabilities) impact the number of students on an educator’s caseload.

However, appropriate service provision and staffing require some knowledge of students with visual impairments to implement state guidance appropriately. Instead, the responsibility for assigning caseloads often falls to district and/or school administrators, who may have limited experience working with students with visual impairments (Wilton, 2017; Zebehazy et al., 2023). As there is an ongoing shortage of both TSVIs and O&M specialists, administrators often assign students to TSVIs and/or O&M specialists using a caseload rather than a workload model (Meador, 2015; Wilton, 2017).

**Problem with Caseload Model**

Most research has considered TSVI’s and O&M specialists’ caseloads. In research studies conducted over the past 20 years, TSVIs and O&M specialists have consistently reported caseloads ranging from 1-100 students, with a mean of approximately 20 students (Hebert & Savaiano, 2021; Meador, 2015; Zebehazy et al., 2023). In Zebehazy et al.’s. (2023) study, itinerant TSVIs and O&M specialists again reported caseloads of 20-300 students. However, approximately 14% of vision professionals reported caseloads of 30-200 students. Accordingly, many TSVIs and O&M specialists report large, unmanageable caseloads, as well as concerns about the resulting quality of service students receive (Meador, 2015; Wall Emerson & Anderson, 2014; Zebehazy et al., 2023).

Research indicates that as the number of students on a teacher’s caseload increases, teaching quality declines (Bettini et al., 2017; Wall Emerson & Anderson, 2014; Wilton, 2017). In particular, as caseloads increase, use of individualized instruction and accommodations for students with visual impairments decline (Wilton, 2017). Large caseloads contribute to teacher stress and may eventually lead to burnout, impacting a teacher’s physical and mental health, and ultimately lead to attrition (Bettini et al., 2017; Hogue & Taylor, 2020; Texas Action Committee for the Education of Students with Visual Impairments, 2020; Wilton, 2017). The RAND Corporation (Doan et al., 2023), in its *State of the American Teacher Survey*, found that teachers are twice as likely as other workers to experience work-related stress. In a field like visual impairment, where a shortage already exists, making sure these professionals do not leave the field due to burnout is crucial. Researchers have noted a significant negative relationship between special educator burnout and student individualized education program (IEP) quality, teacher adherence to interventions and accommodations, and student achievement of IEP goals (Bettini et al., 2017; Hogue & Taylor, 2020). As teachers experience greater levels of stress, they are less able to meet their students’ needs; their students are then less likely to meet and/or exceed their annual IEP goals. Other researchers have noted a link between teacher burnout and poor student behavior and engagement (Hogue & Taylor, 2020).

TSVIs, O&M specialists, and the students they serve also experience the effects of unmanageable caseloads. As TSVIs and O&M specialists serve larger numbers of students, they shift from direct instruction to consultation (Wilton, 2017). Thus, students may receive less direct instruction in the Expanded Core Curriculum and/or their instruction may be less effective (Wilton, 2017; Zebehazy et al., 2023). Similarly, TSVIs and O&M specialists with large caseloads have reported adverse effects on students’ curriculum access and achievement, as they have less time to individualize students’ education and provide appropriate accommodations (Wilton, 2017).

**Benefits of Considering Workload**

Few researchers have considered TSVI and O&M specialists’ workloads. The *Visual Impairment Scale of Staffing Pattern Analysis (VISSPA)*, developed by the Workload Analysis Subcommittee of the Texas Action Committee on Education of Students with Visual Impairments, is the first tool focused solely on the workload of itinerant vision professionals (Pogrund et al., submitted 2023). TSVIs and O&M specialists spend approximately 19 hours per week on professional responsibilities other than direct services to students, including travel between educational sites (Griffin-Shirley et al., 2004; Zebehazy et al., 2023). Surveys show that itinerant educators could be spending, on average, 5-7 hours per week traveling between schools to provide services to children (Griffin-Shirley et al., 2004; Hebert & Savaiano, 2021; Meador, 2015). Travel time varied greatly among itinerant TSVIs and O&M specialists based on geographic locale, with itinerants in rural areas spending more time per week traveling compared to their urban counterparts (Hebert & Savaiano, 2021; Meador, 2015).

Travel time is only one aspect of an itinerant TSVI or O&M specialists’ workload that should be considered. Initial research suggests that considering an itinerant educator’s entire workload (i.e., travel, materials preparation, meetings) could alleviate some of the negative outcomes of large caseloads (AOTA, APTA, ASHA, 2014; Pogrund et al., submitted 2023). In particular, use of a workload model increased opportunities for collaboration with other teachers and related service providers, allowing itinerant educators to feel more supported (AOTA, APTA, ASHA, 2014).

**Recommendations**

To ensure that students with visual impairments receive a free, appropriate public education, TSVIs and O&M specialists must engage in regular workload analysis with their administrator(s). The number of students served by each TSVI and/or O&M specialist may vary based on the workload analysis results. An effective workload analysis should address the following.

* Ensuring a manageable, equitable workload begins by accurately determining student needs using a caseload analysis (Sapp et al., 2013; Toelle & Blankenship, 2008). TSVIs and O&M specialists should use the student’s most recent evaluation results to determine student strengths, needs, and service times. This information should be explicitly reflected in the student’s IFSP or IEP.
* When calculating student service time, TSVIs and O&M specialists should consider their full scope of practice (e.g., direct instruction, collaborative consultation, preparation, etc). TSVIs and O&M specialists should use objective tools with evidence of reliability and validity based on student need (i.e., *Visual Impairment Scale of Service Intensity of Texas* *(VISSIT)* (Pogrund et al., 2019) and *O&M VISSIT* (Pogrund et al., in press), *Vision Services Severity Rating Scales (VSSRS)*) to determine student service times as needed.
* TSVIs and O&M specialists, working with administrators and related service providers, should use a workload analysis model when planning service provision and staffing. A workload analysis model considers the full range of educators’ duties, unlike a caseload model which just considers how many students they serve.
* TSVIs and O&M specialists should document time spent working, especially if they are currently unable to meet student needs due to their workload (Zebehazy et al., 2023). TSVIs and O&M specialists should also consider collecting additional, supporting data (e.g., progress monitoring data, intervention fidelity data, teacher surveys, etc.). Such documentation should then be shared with administration to advocate for more equitable workloads. Use of a validated workload analysis tool that considers all aspects of a vision professional’s job is important to document time spent on direct and consultative services as well as the additional tasks required by these itinerant positions.
* Workload analysis should be conducted with team members and with administrators at least annually, and administrators should review staffing regularly to ensure manageable workloads.

**Position**

It is the position of the CEC-DVIDB that services provided to students with visual impairments must be based on individual student need rather than the number of available TSVIs and O&M specialists. When determining student services and staffing, administrators, in conjunction with TSVIs and O&M specialists, should conduct a workload analysis to account for all professional activities performed by special educators. Finally, further empirical research is needed to determine appropriate workloads for TSVIs and O&M specialists and the impact of TSVI and O&M specialist workloads on student outcomes.

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