

Balancing Multiple Hats: Teaching Case Management Skills to Pre-Service Special Education Teachers

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PSETs need supported, scaffolded experiences where they can practice how to multitask and balance the many hats they will soon be required to wear.

ABSTRACT

Case management is one of the biggest contributors leading to burnout and turnover among novice special education teachers. One potential solution to help alleviate this problem is improving how case management is taught and practiced in teacher preparation programs utilizing practice-based learning opportunities. This practitioner article highlights how to replicate realistic scenarios and activities within preexisting special education courses to help practice the various skills of case management, including organizing due dates, communicating with parents, collaborating with IEP team members, planning when to collect data within your school day, prioritizing tasks, and solving unexpected problems. Each activity includes an example or template for practitioners and teaching tips to help effectively implement in different contexts.

KEYWORDS

Case manager, case management, practice-based learning, pre-service special education teachers

Katie, a first-year special education teacher, is two months into her first teaching position. She arrives at her school 15 minutes early and sits down at her desk to organize her day. She has her lessons and materials ready to go for her classes. She also has a list of the progress monitoring she needs to complete when she sees the students on her caseload for pull-out services. Additionally, Katie has an Individualized Education Program (IEP) coming up that she needs to begin working on during her preparation period. Katie writes down these items on a list and is ready to start her day. In her 1st-period math class, a student on Katie's caseload comes to the class frantic and upset, requesting her immediate attention. During her 2nd-period resource room, Katie could not complete all the progress monitoring she had planned due to the special education director calling her to discuss a new student who would be added to her caseload. While in her 3rd-period English class, Katie receives an email from a parent on her caseload who is very concerned about their child's social and emotional functioning and requests a callback as soon as possible. Katie spends her 4th-period preparation and lunch gathering input from the rest of the students' IEP team and calling the parents back to address their concerns and come up with a plan. During Katie's 5th-period resource room, she needs to provide a read-aloud for a student taking a test due to staff absences. The bell rings for dismissal, and Katie lets out a sigh. Katie's day did not go as she planned; she was not able to fully cross anything off her to-do list. She feels overwhelmed. Thinking back to her days in college, Katie cannot remember ever learning about how to practice balancing these tasks and feels ill-prepared.

A special education case manager wears many hats. These hats are rotated throughout the course of a day, and case managers oftentimes must balance multiple at one time. The Individuals with Disabilities Education Improvement Act (IDEIA, 2004) identifies a case manager as someone certified in special education who is responsible for creating, maintaining, and overseeing students' Individualized Education Programs (IEPs). A special education case manager

is also the point of contact between parents, teachers, and other IEP team members. This collaboration requires responding to emails, making phone calls, and conducting meetings for student concerns or celebrations (Caballero, 2024). For most school districts, special education teachers (SETs) are responsible for teaching but also serving as a case manager (Billingsley & Bettini, 2019). For decades, researchers have identified that case management, with its numerous responsibilities, is the leading cause of burnout and attrition among SETs (Billingsley, 1993; Billingsley & Bettini, 2019; Caballero, 2024; Hagaman & Casey, 2018).

Billingsley and Bettini (2019) conducted a review of 25 research studies to identify stressors connected to case management that increase attrition. The stressors included having an unmanageable caseload with too many students, not enough time to complete paperwork requirements, and lack of support from fellow IEP team members. Furthermore, researchers have found the attrition rate for newly hired or novice SETs to be even higher, with almost a third of newly hired SETs leaving the field within three years of employment (Cancio et al., 2018). In conducting interviews of recently certified SETs, researchers discovered a theme in novice SETs' feelings, noting it was nearly impossible to provide special education services to each student on their caseload and that the responsibilities of case management took away time from their teaching responsibility (Bettini et al., 2017; Cancio et al., 2018; Hagaman & Casey, 2018; Grant, 2017).

Researchers (Billingsley, 1993; Billingsley & Bettini, 2019; Caballero, 2024; Hagaman & Casey, 2018) recommend a change to how educator preparation programs prepare

pre-service special education teachers (PSETs) for the complexities of case management to help reduce attrition in the field. The Council for Exceptional Children (2024) outlines seven standards required in undergraduate special education preparation programs, with several directly connected to case management, including collaborating with team members and using assessment data as part of the IEP and progress monitoring process. Scholars found that practice-based learning is most effective for preparing PSETs for case management responsibilities. Examples include engaging in parent interviews (Strassfeld, 2019), practicing time management strategies (Da Fonte & Barton-Arwood, 2017), and conducting mock IEP meetings (Mason, 2011; Toledo, 2023). However, PSETs are often taught these hats or responsibilities in isolation, focusing on one at a time within their preparation courses, such as designated classes for lesson planning, paperwork requirements (e.g., IEPs), progress monitoring, and parent communication (Da Fonte & Barton-Arwood, 2017; Strassfeld, 2019; Toledo, 2023).

An effective case manager requires strong executive functioning (e.g., time management, organization, attention to detail) and personal skills (e.g., communicating in-person and virtually with IEP team members) to successfully complete all responsibilities. In contrast, many undergraduate students, both nationally and internationally, in SET preparation programs, differ from those in previous decades. For example, Gen Z students have exhibited a greater need for support in soft skills (Noah & Aziz, 2020) or social and emotional skills (Kassie, 2023) due to a multitude of factors including the ongoing impact of pandemic-related disruption and digital-first interactions.

PSETs need supported, scaffolded

experiences where they can practice how to multitask and balance the many hats they will soon be required to wear. Additionally, they need practice with daily, unexpected events that may occur, and learn how to address them in the moment. PSETs may be prepared to write a lesson plan or work on an IEP during their prep period, but what happens when they are pulled in various directions, as Katie experienced in her workday? They need to know how to do their various job responsibilities simultaneously and practice the soft skills that go along with these expected and unexpected tasks. Beginning SETs may benefit from a toolbox of skills for communication, conflict resolution, and teamwork when supporting students' daily needs and collaborating with parents, teachers, administrators, and fellow IEP team members. Providing opportunities to learn about and practice these skills begins at the teacher preparation level.

The Collaboration for Effective Educator Development, Accountability, and Reform (CEEDAR) Center emphasizes that quantity is just as important as the quality of practice-based learning in campus-based coursework for beginning teachers (Benedict et al., 2016). This practitioner article will describe a step-by-step guide for how to revamp current special education preparation courses to embed quality practice opportunities that engage PSETs in realistic case management activities to help them apply their learning and prepare for the multitasking of case management. The authors will detail various teaching activities that can be embedded into existing courses to manage paperwork requirements, data collection, parent communication, IEP team member collaboration, meetings, and prioritizing and handling unexpected events.

FIGURE 1: Example PSET Schedule

PSET Name	HR	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8
		Biology	Pre-Algebra	Biology	Science	PREP	Science	Lunch	Support Days 1,3,5 Other Duties Days 2,4,6
		Comp B2	PREP	Decode B2	Decode C	Comp B1	Comp C	Lunch	
		Algebra 1	Pre-Algebra	Math A	PREP	Math B	Lunch	Algebra 1	
		Finance	Algebra 2	Math C	Algebra 2	Algebra 1	Lunch	PREP	
		English 9	English 9	English	English 10	English	Lunch	PREP	
		History	Civics	PREP	Global Studies	History	Global Studies	Lunch	
		PREP	English 10	Comp B2	English 11	English 9	Lunch	English	
		Math B	History	Science	Civics	PREP	Lunch	Global Studies	
		History	Pre-Algebra	Math B	PREP	Math A	Lunch	Finance	

Note. The pre-service teachers were told their contractual school day, as secondary special education teachers, was 7:25 a.m. to 3:00 p.m. Student arrival was 7:30 a.m. and dismissal was 2:35 p.m.

Embedding Opportunities into an Existing Course

To illustrate how case management related activities can be infused in a traditional preparation program, we begin with a course-level example. Case management activities were embedded within an existing 15-week required undergraduate special education certification course at a mid-sized public university in Southeastern Pennsylvania. We describe the course set up and each component of the case management activities implemented in the course. We include time saving tips and ideas to aide in replication. Instructor tips are included to spark application ideas and save preparation time for course activities

The course met in person once a week for approximately two and a half hours. The course focused on how to teach and support secondary-aged students receiving special

education services who spend most of their day in general education classrooms. This course emphasized co-teaching, evidence-based teaching strategies for academic and functional skills (e.g., study skills), and how to properly implement accommodations and modifications. As a prerequisite to this course, PSETs had already completed a course on assessment in special education and had learned about paperwork requirements. To help connect their background knowledge and apply new learning, the case management activities were embedded in each weekly module with a focus on secondary-aged students. For example, during the week that focused on co-teaching and how to effectively communicate with other professionals, the students practiced introducing themselves to the general education teachers via email, responding to concerns brought to them by a general

education teacher, and requesting more information from a general education teacher.

Initial Setup

To begin with, PSETs learned about concepts and big ideas related to case management. Following this review, each PSET was given a copy of their fictitious daily schedule as a SET that included their contracted times of the school day (Figure 1). When discussing the schedule and contracted times, the PSETs were informed that they could not schedule or complete activities such as sending an email to a parent or checking student grades outside of their contracted school hours. This was vital to have PSETs practice time management skills while learning to prioritize responsibilities and support conversations on self-care and the importance of a work-life balance. During the initial setup phase,

FIGURE 2: Example Caseload Due Date Template

Caseload Student Name	IEP Due Date	RR Due Date	2 Weeks Prior to IEP	1 Week Prior to IEP	90 Days	60 Days

Note. PSETs would be required to include a row for each student on their caseload.

each PSET was provided with a list of 18 fictitious students on their caseload. In Pennsylvania, a SET supporting students with learning support services can have a maximum of 50 itinerant students, 20-30 supplemental students, and 12 full-time students (Special Education Services and Programs, 2001). We selected 18 for the caseload number to reflect students receiving supplemental services and to be a manageable number for PSETs completing this process for the very first time.

For each student on their caseload, PSETs had the date (month, day, year) of their last IEP as well as the date of their reevaluation. In accordance with IDEIA, the reevaluation is conducted every three years. In Pennsylvania, this evaluation is referred to as the Reevaluation Report (RR), and typically the case manager assists in writing this report. Lastly, PSETs were given a summarized list of each student’s IEP goals and their required accommodations. For their mock roles, PSETs were assigned as a high school learning support case manager, with students who qualify for special education services, classified with a specific learning disability, other health impairment, emotional disturbance, and/or autism spectrum disorder.

Instructor Tips. When considering initial setup, here are some tips:

- Generate caseload lists that appear unique for each PSET while

keeping some student characteristics the same. Reorder the list and change the names of the students but keep the dates of the students’ last RR and IEP the same to help streamline the grading process.

- Space out students’ RR and IEP due dates, but also purposely put about three within the same month to help PSETs balance multiple due dates at once, similar to how it may occur in a full-time position.
- Provide the PSETs with a calendar that include the first day of school, in-service days, and days off for holidays/other breaks.
- Plan to utilize artificial intelligence (AI) to create a new list of IEP/RR dates each year by adding a year to each date instead of manually changing each item.

Case Management Activities

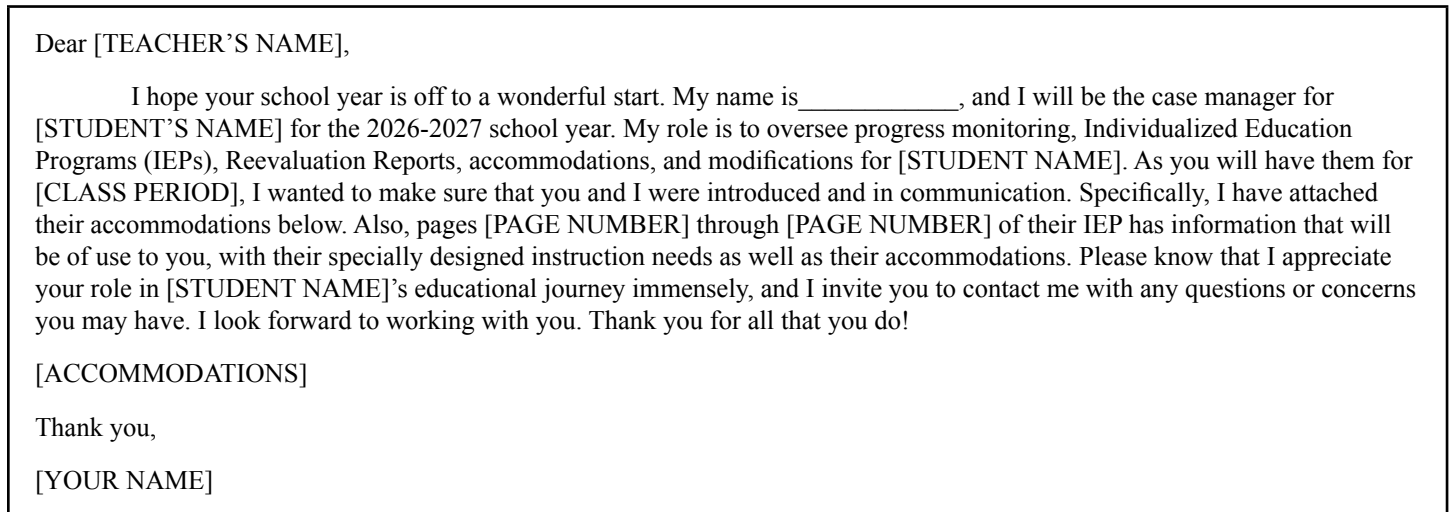
We identified six case management activities that the PSETs would be required to complete. These activities focused on paperwork requirements, communication, managing accommodations, organizing updates to parents, grade checks, and planning when data will be collected on the PSETs caseload students’ IEP goals for progress monitoring.

Activity 1 – Paperwork Due Dates. PSETs learned about special education paperwork requirements based on IDEIA mandatory timeframes in a previous course. To practice this prior

knowledge, PSETs created a table (Figure 2) where they determined the new IEP and RR dates for each student on their caseload based on the list they received in the initial setup. For IEPs, the PSETs had to look at one day less than a full year, to ensure an active IEP was in place before expiration. PSETs organized their new annual IEP due dates in chronological order. Additionally, PSETs used backward planning to allocate time during their prep periods to complete each IEP by its designated due date. For the RRs, this required PSETs to remember that the students on their caseload require a new RR every three years. Additionally, PSETs were required to engage in backwards planning after establishing the due dates for all paperwork during the current academic year. The PSETs identified two weeks prior to the IEP due date as a reminder to send the draft home for review and preparation for the meeting. For RRs, the PSETs identified 90 days prior to the RR due date to begin reviewing student records and 60 days prior to the RR due date to determine if updated testing was required. These timelines are the requirements in Pennsylvania but may vary by state. This activity helped PSETs not only remember essential timelines but apply them to a caseload of students to maintain compliance.

Instructor Tips. Tips for implementing Activity 1 include:

- Create mock due dates that land

FIGURE 3: PSET Template Email to General Education Colleagues

on weekends, holidays, and summertime to help PSETs problem solve when each item could be completed during contracted time.

- Encourage PSETs to set up a color-coded organizational system to help them differentiate due dates among the various students on their caseload.

Activity 2 – Time Management for Paperwork. We discussed the importance of time management skills to complete legal paperwork requirements as a case manager. This included reviewing how to plan in advance to designate before-school time, preparation periods, lunch, or after-school time to specific responsibilities. Additionally, we talked through examples to help increase time management skills such as using physical or digital organization systems, finding a quiet space to work in a school building, and politely telling coworkers when they need to focus on paperwork versus socialization. To practice time management connected to paperwork, PSETs were given a calendar for one month during the academic year. The PSETs recorded any RRs or IEPs due that month, including when the meetings would occur based on their

teaching schedule. They also used the dates identified in Activity 1 to block calendar time for data collection and report writing based on the mandatory timeframes (i.e., 90 days prior, 60 days prior, or two weeks prior). This activity required PSETs to practice time management skills to utilize their preparation periods and ensure responsibilities are completed by their designated due dates.

Instructor Tips. Tips for implementing Activity 2 include:

- Select a month in which there are at least two IEPs, one RR, and a few reminders occurring to provide PSETs with a “real” month of multitasking due dates.
- Provide PSETs with one 50-minute prep period and one 50-minute lunch period per school day to try to manage what they can realistically accomplish during those timeframes.

Activity 3 – Communication with General Education Colleagues. To simulate how a SET might communicate with a general education colleague, PSETs submitted an email from the perspective of a new SET who is introducing themselves to a general education teacher (Figure 3). The PSETs

were required to include an introduction of themselves as the student's case manager. The email stated what their role is as a case manager, what class period the student is in, what the student's accommodations or modifications are, as well as specific pages they can be found in the student's IEP. The email concluded with a statement about working collaboratively throughout the school year. This simple communication tip at the beginning of each school year is essential in ensuring general education teachers have a copy of all IEPs, understand what is required, and who to contact or collaborate with as part of the student's IEP team.

Instructor Tips. Tips for implementing Activity 3 include:

- Have PSETs create a template that they could use to start emails for all students on their caseload and then personalize it for individual teachers.
- Require PSETs to maintain professionalism within all elements of the email including a clear subject, greeting, and closure.

Activity 4 – Parent Communication. We reviewed with PSETs strategies for how to communicate with parents (e.g., face-to-face, phone,

video conferencing), how often you should communicate (e.g., annual IEP meeting, progress reports, on-going check-ins), and what information should be shared (e.g., updates on student progress, any concerns, general school announcements). Components of professional emails were also discussed, and examples and nonexamples were provided. We also reviewed the dynamics of meetings and how to encourage parent communication by asking parents questions first, creating an agenda for the meeting, and remembering to explain special education terminology using user-friendly terms. This content also included the basics of professional communication such as maintaining appropriate eye contact and body language, avoiding the use of jargon and slang, using appropriate wait time especially if an interpreter is involved, and highlighting a student's strengths before focusing on areas for improvement. Lastly, we reviewed tips for how to handle conflicts or high emotions during meetings by remaining calm, identifying the concerns to be addressed, providing data or examples to support claims, and working on compromises as appropriate. Following this instruction, PSETs completed several activities to prepare themselves for different types of parent communication.

Part A. PSETs created a blank communication log template that was comprehensive enough to record received and sent communications with all parents or guardians of students on their caseload. This included electronic communication such as video meetings or emails as well as face-to-face, telephone calls, or written communication. PSETs would later receive scenarios that require them to address parent concerns or honor parent requests using various forms of communication. This communication log helped PSETs understand the importance of documen-

tation, especially for the preparation of an IEP, addressing concerns, or for potential mediation or due process situations.

Part B. PSETs created a document that tracks their caseload students' weekly grades for each class they are taking. This document helped PSETs stay on top of the students' academic performance, track missing assignments, and monitor risk for course failure. By tracking grades, the case manager learns to be proactive in supporting the student or reaching out to the IEP team as needed. This weekly grade tracker would also be used by the PSETs when addressing incoming parent concerns described in Activity 7 – Prioritizing Tasks.

Part C. The PSETs received an email from a parent on their caseload expressing concerns regarding their child in a particular class. The PSETs had to practice drafting an email to the general education teacher to request additional information regarding the concern. This helped further practice communication with general education teachers (Activity 3). After receiving a response from the instructor, the PSETs had to complete an audio recording of their phone call to the parents addressing their concerns and identify appropriate next steps. Lastly, PSETs had to record the email on their communication log (Part A).

Part D. The PSETs were given a more detailed description regarding one of the students on their caseload. The PSETs used this information to prepare for a face-to-face meeting with the student's parent at the upcoming back-to-school night or parent-teacher conferences. The instructor role-played the student's parents and had each individual PSET engage in a mock discussion, requiring them to respond to on-the-spot questions using appropriate communication techniques.

Instructor Tips. Tips for implementing Activity 4 include:

- Require the communication log and weekly grade tracking sheets to include a date column for proper documentation. Also, require PSETs to have a notes or “other” information column for additional detail that may be needed.
- Purposely vary the different types of communication methods used such as sending emails, responding to emails, receiving a call, leaving a voicemail, or in-person meetings to replicate another level of multitasking and the preferred communication methods of families.

Activity 5 – Accommodations and Modifications Tracking. The PSETs learned about accommodations and modifications in previous coursework. To help PSETs ensure IEPs are implemented properly, the PSETs created a document in which they tracked the accommodations and modifications for each student on their caseload. An example portion of this document is included in Figure 4. Through tracking, PSETs can determine, at a glance, where multiple students within the same class may need the same accommodation or modification. The tracker also helps PSETs to document the use and success of each and prepare for IEP meetings where they must determine the continuation or revision of accommodations and modifications.

Instructor Tips. Tips for implementing Activity 5 include:

- In line with the secondary focus of the course, assign PSETs roles which focus primarily on tracking accommodations rather than modifications within the general education classroom.
- Incorporate various types of accommodations and modifications to address different academic (e.g., reading, writing, or math)

FIGURE 4: Example Accommodations and Modifications Tracker

Accommodation	Students	Jenn	Steve	DJ	Chelsea	Tyrek	John	Moonum
Test/quiz read aloud	5	x	x	x		x		x
Extended time- 2x	4	x		x	x	x		
Extended time- 1.5x	3		x				x	x
Test in a separate location	7	x	x	x	x	x	x	x
Guided Notes	4	x		x		x	x	
Study Guides	4	x	x		x			x
Access to CM when frustrated	2			x			x	
Access to CM as needed	1	x						
Preferential seating close to classroom door	4	x		x			x	x
Homework log	1		x					
Red/green card system to ask for help	1			X				
Extra set of books sent home	2	x	x					
Oral directions paired with written directions	3	x			x		x	
Nonverbal cues when student is disengaged	1			x				
Weekly emails sent home to parents on grades	2		x			x		
Use of speech to text software	1	x						
Use of a calculator	6	x	x	x	x	x		x

and functional (e.g., organization, time management, social skills, self-regulation) needs.

Activity 6 – Data Collection. The PSETs had previous course experience with data collection procedures. For this activity, PSETs learned more about time management and planning related to data collection as well as the use of data for activities such as progress report writing. PSETs received realistic datasets and utilizing the calendar that was created in Activity 2, they determined when they will collect data for their caseload students' IEP goals and when they will remind others that they have to collect data. An example of one week of this calendar is provided in Figure 5. The calendar illustrates how to track a student's name, goal number, and what period the data would be collected below the calendar. This organization of data collection is essential to ensure the PSETs are properly collecting progress monitoring data for scheduled prog-

ress reports.

Additionally, PSETs received fictitious data for one of their caseload students' IEP goals. The PSETs had to use this data to create a progress report that would be sent home to the parent. This included drafting an email to accompany the progress report explaining in parent-friendly terms what a progress report is and an overview of the student's performance. This activity is also connected to PSETs practicing electronic communication with parents (Activity 4).

Instructor Tips. Tips for implementing Activity 6 include:

- Utilize different criteria when developing annual goals for PSETs' caseloads of students in order for PSETs to practice different ways of collecting and analyzing data.
- Make some annual goals align with the instruction students receive in their pull-out special education classroom to ensure PSETs plan to collect that data themselves as

the SET (e.g., reading fluency data would be collected in their decoding class).

- Make some annual goals align with the instruction students received in their general education classrooms or when working with a related service provider to ensure PSETs plan to collaborate with fellow IEP team members responsible for collecting data.

Activity 7 – Prioritizing Tasks.

PSETs learned that multitasking is involved during each school day. Case managers receive multiple requests, communications, or inquiries at the same time from different IEP team members. PSETs were provided with a graphic organizer that included at least five different "requests" throughout their school day to simulate what managing additional professional responsibilities can look like as a case manager (Figure 6). The PSETs were then responsible for prioritizing the items, explaining the rationale for how they prioritized the items, iden-

FIGURE 5: Data Collection Example

Monday Cycle Day #	Tuesday Cycle Day #	Wednesday Cycle Day #	Thursday Cycle Day #	Friday Cycle Day #
Send two-week reminder for Chase’s IEP meeting Sarah’s IEP meeting during 4 th period Lindsay, Goal 4, collected by English teacher	Amelia, Goal 1, Period 1, collected daily by me in English Charlie, Goal 2, Period 3, data collected by me in English Katie C, Goal 1, Period 4, data collected by Global Studies teacher Brandon, Goal 3, Period 8, data collected by me during support	Ezra, Goal 2, Period 3, collected by paraprofessional during transitions Colton, Goal 1, Period 4, data collected by Study Hall teacher Spencer, Goal 4, Period 8, collected by me during support	Send two-week reminder for Ezra’s IEP meeting Izzy, Goal 1, Period 3, data collected by Study Hall teacher Anya, Goal 1, Period 8, data collected by me during support	Eric, Goal 1, Period 2, collected by me in Algebra I Andrew Goal 2, Period 5, collected by English teacher Sarah, Goal 4, Period 6, collected by me in Algebra II Zach, Goal 3, Period 8, collected by me during support

FIGURE 6: Inbox Assignment

Item	Priority Number & Why	Response	When Will You Do It	Any Other Considerations
A. You get an email from a teacher at the Career Center indicating they have concerns about one of your student’s behavior and progress and want to meet.				
B. A student stops by your room on the way to homeroom to tell you that they had a test yesterday in Biology and didn’t get extended time on it and they weren’t able take it in a separate location.				
C. You have an email from your principal indicating that during your 8 th period tomorrow (an odd day) you need to cover a class for another faculty member.				
D. You have two behavior checklists to fill out that are due in two days. They should each take about 30 mins.				
E. You have an email from a parent indicating that they do not think their child is getting the support that they need in their general education classes and are concerned about their child’s grades.				

tifying when they will respond/do the task (based on their individual schedule), and describing any other considerations or questions that pertain to each item. PSETs engaged in conversation regarding how they could utilize their available time and the pros and cons of prioritizing certain tasks over others (e.g., how can it impact the student). Additionally, PSETs extended the graphic organizer by having to follow through or complete one of the tasks. The instructor referred to these tasks as Inboxes (requests from IEP team members) and Inbox Responses (completing one of the requests).

Instructor Tips. Tips for implement-

ing Activity 7 include:

- Ensure that the response types vary (e.g., audio recordings of voicemails, emails, face-to-face conversations) to practice a level of multitasking as many of these are connected to previously reviewed case management activities (Activity 3 - Activity 6).
- Provide the opportunity for PSETs to respond independently, but also the opportunity for peer and whole class discussion to gain different perspectives and reflect on how their responses may change.

Activity 8 – Unexpected Events.

In the course, PSETs learned how case management can include responding to “in the moment” challenges or unexpected events that can occur during a school day regarding students on their caseload. Within class, and unannounced, PSETs were presented with a description of an event read aloud by the instructor. Immediately after the event was given, the PSETs had one and a half to two minutes to type and submit how they would respond to the event. Following submission of their responses, the instructor and PSETs engaged in collaborative discussion on their responses and other consid-

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erations. These unexpected events included scenarios like a student on their caseload becoming upset during class, a fellow teacher calling to request advice regarding a student, and last-minute request for class coverage.

Instructor Tips. Tips for implementing Activity 8 include:

- Use the “unexpected events” activity as a natural break for class sessions. Introduce the events in the middle of class to truly practice the “on-the-spot” reaction. PSETs are given a brief (five-minute) break after submitting their response before having a whole class discussion.
- Capitalize on discussion related to boundaries and how everyone might be more or less comfortable with specific situations as well as how fellow IEP team members can help.
- Read each event aloud and visually display it on the board. However, consider having a fellow student or colleague volunteer to act out the event as a realistic scenario.

CONCLUSION

Case management is complex and typically takes SETs years to become proficient with all the required responsibilities. However, novice SETs should not be left to flounder but should have support and experience during their preparation program for the role. As recommended by previous scholars (Benedict et al., 2016; Da Fonte & Barton-Arwood, 2017; Mason, 2011; Strassfeld, 2019; Toledo, 2023) the PSETs who completed this course shared positive feedback throughout the semester on how using practice-based learning opportunities, to have them actually do versus only think about case management responsibilities, helped them fully understand the role of being a case manager. We intentionally pre-

pared each activity to ensure PSETs had realistic practice with case management responsibilities and the soft skills that accompanied each one. Furthermore, each activity required the instructor to apply High-Leverage Practices such as setting up and managing small-group work for collaboration, implementing organizational routines and procedures for paperwork and data collection, and providing on-going written and oral feedback to PSETs (McLeskey & Brownell, 2015).

Case management activities were embedded within the 15-week course by extending weekly topics to case management skills. Importantly, these assignments and activities did not take away from the context or requirements of the course. Although this course offered flexibility by focusing on secondary special education, teacher educators should consider ways to embed case management practices into other courses. If teaching an assessment course, the instructor can apply case management skills while teaching how to write an IEP. For example, PSETs can complete activities such as documenting parent communication, drafting an email to teachers requesting input, and reviewing collected progress monitoring data for the present levels section of an IEP. Integrating this practice into all higher-level special education courses would allow PSETs to gain case management experience across diverse student populations, ages, grades, disabilities, and school settings.

This practitioner article helps apply research recommendations (Billingsley, 1993; Billingsley & Bettini, 2019; Caballero, 2024; Hagaman & Casey, 2018) to college coursework and encourages other teacher educators to consider revamping undergraduate courses to include practice-based learning opportunities with case management skills. These real-life activities

create engaging experiences that can help PSETs be successful long-term case managers. If Katie had practiced multitasking case management during her teacher preparation, she might have felt better equipped to juggle the multiple hats she wears as a SET. Having application experience with roles and tasks associated with being a case manager could reduce the stress of case management and potentially lead to lower rates of burnout and attrition.

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