

A PHENOMENOLOGICAL STUDY OF THE EXPERIENCES OF SCHOOL LEADERS'
PREPARATION AND LEADERSHIP OF INCLUSIVE AND SPECIAL EDUCATION
PROGRAMS

by

April Burwell

Liberty University

A Dissertation Presented in Partial Fulfillment
of the Requirements for the Degree

Doctor of Philosophy

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ABSTRACT

This transcendental phenomenological study describes how public school leaders experience learning and leading inclusive and special education programs. Two theories guided this study: Knowles's adult learning theory and Mezirow's transformative learning theory. The central research question for this study was how school leaders describe their professional experiences in leading inclusive and special education programming. The 10 participants in this study were school leaders endorsed in administration and supervision K–12. A criterion sampling was utilized for participant selection across three school districts in Central Virginia. The phenomenological approach was applied during data analysis. Horizontalization and coding were used to identify common themes and patterns. The data collected through interviews, participant journals, and a focus group revealed the following four major themes (and one sub-theme): Leadership Experiences Motivate Acquiring New Knowledge (with the sub-theme *Leaders Identify Gaps in Their Knowledge*), Developing Leadership Style Based on Self-Awareness, Leading through Experiential Learning, and Leading a Diverse School Culture Using an Inclusive Mindset. The data were analyzed to develop textural and structural descriptions to arrive at the essence of school leaders' experiences. Results showed that school leaders lacked formal training in leading inclusive and special education, which impacted their proficiency to lead inclusive and special education programs. The study found that school leaders indicated a significant need to collaborate when making decisions for inclusive and special education programming. Implications from the study revealed school leaders' need to receive adequate preparation before leading inclusive and special education to improve student outcomes.

Keywords: special education leadership, adult learning theory, transformative learning theory, leadership, inclusion

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Dedication

Jeremiah 29:11 (NIV) says, “‘For I know the plans I have for you,’ declares the Lord, ‘plans to prosper you and not to harm you, plans to give you hope and a future.’” Thank you, God, for showing me to trust your plan. This manuscript is dedicated to a host of people who believed in me and supported me. First, I want to thank my son, Camden, who inspired me always to be the best version of myself. As he watched me progress in academia and as a mother, he hugged me, cried with me, and encouraged me. Thank you, son. I am honored to be your mother. To my parents, Barbara and Edward Martin, you have instilled in me a tenacity to finish what I start, a boldness never to settle, and an unconditional love for God and family. Without your prayers, guidance, and unwavering support, I would not be who I am today. Thank you both for loving me and showing me how to serve and lead with love. To my late Auntie Willie Ann Willcox and Uncle George R. Willcox, thank you for sharing your superior work ethic and passion for literacy and education. Auntie, all those trips to Barnes and Noble paid off. We did it, and I know you are smiling down from heaven; I love you more. Uncle George, I lost you during the dissertation process, but I remember our last conversation to stay on the course; it will pay off. Angela D. Minor, ESQ, you are my guiding light; thank you for loving me and encouraging me. Lastly, thank you to my students. I will always advocate for you.

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To my loving husband, Jerrod Burwell, you have stood by my side throughout this journey. You were my biggest cheerleader. I love you so much. Thank you for making the sacrifice to allow me to follow my dreams, even though it meant you took on additional responsibilities by cooking several meals, helping Camden with homework, feeding, and entertaining Rosie, and caring for Ivy. You did all these things with a smile on your face, and

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List of Abbreviations

Council of Exceptional Education (CEC)

Education for All Handicapped Children Act (EACHA)

Every Student Succeeds Act (ESSA)

Free and Appropriate Education (FAPE)

Institutional Review Board (IRB)

Individuals with Disabilities Act (IDEA)

Individuals with Disabilities Education Improvement Act (IDEIA)

Individualized Education Plan (IEP)

Least Restrictive Environment (LRE)

No Child Left Behind (NCLB)

Response to Intervention (RTI)

CHAPTER 1: INTRODUCTION

Overview

The role of school leaders has evolved from managing operational tasks to being instructional leaders (Bettini et al., 2017). Administrators are expected to be competent in specially designed instruction to meet the individual needs of students with disabilities and follow special education law (Esposito et al., 2019). However, leadership preparation programs lack high-quality experiences that prepare principals to connect content to real-world situations (Esposito et al., 2019; Leckie, 2016; Rinehart, 2017). Ineffective school leadership can contribute to teacher attrition and negatively impact student success (Conley & You, 2017).

The chapter provides an overview of this study and describes the learning experiences of school leaders during their participation in university-based leadership programs and district-level professional development. The study sought to understand their experiences in leading inclusive and special education programs. This chapter provides a background of the study by reviewing the historical, social, and theoretical context. The review includes the situation to self, the problem and purpose statements, the study's significance, research questions, definitions, and chapter summary.

Background

In 2015, Knowles expanded on educational theory to explain the process of how adults learn. Unlike children, who heavily rely on teachers' instruction, adults, such as public school leaders, take ownership of their learning, and their experiences guide their learning process (Knowles, 2015). Mezirow's transformative learning theory expands on Knowles's adult learning theory by exploring the process of effecting change in a frame of reference (Mezirow, 1991, 1997). Frames of reference are defined as "the structures of assumptions through which

adults understand experiences” (Mezirow, 1995, p. 5). McCauley, Hammer, et al. (2017) asserted that adulthood experience could influence how leaders comprehend and apply leadership course material to the workplace environment. The following section includes the historical, social, and theoretical context for the study.

Historical Context

Special education law has paved the way for the progression of special education students receiving public school education. Until the end of the 18th century and after the American and French Revolutions, people with disabilities were marginalized by not having the same access to education as their non-disabled peers (Hallahan et al., 2012). However, in the 1960s and 1970s, systematic procedures were put in place to increase access to public education for children and adults diagnosed with either intellectual disability and or mental illness living in residential institutions. In 1975, the passage of Public Law 94-142 mandated access to public education for all children regardless of disabilities (Keogh, 2007). Public Law 94-142, referred to as the Education for All Handicapped Children Act (EAHCA) mandated specific requirements to ensure every child receives a free and public education, due process, nondiscriminatory assessment, and an Individual Education Plan (IEP) (Keogh, 2007). The EAHCA underwent several amendments after 1975. Since 2004 it has been referred to as the Individuals with Disabilities Education Improvement Act (IDEIA) but is most commonly known as the IDEA (Hallahan et al., 2012). Revisions to the IDEA in 2004 include specific licensure requirements for special education teachers but do not address school leaders’ requirements (Russo et al., 2005). The reauthorization of the IDEA ensured additional protection for students with disabilities and their families. IDEA brought increased accountability and responsibilities for special education administrators. The law requires that students with a disability receive a free,

appropriate public education (FAPE) in the least restrictive environment (LRE) in every state and locality across the country (Public Law 94-142; Thompson, 2017).

In 2015, the Every Student Succeeds Act (ESSA; P.L. 114-95) replaced the No Child Left Behind Act (NCLB) as the reauthorization of the Elementary and Secondary Education Act (ESEA) of 1965. ESSA extended legal protection and empowered the states to provide equal opportunity for all students (Egalite et al., 2017). Consequently, special education programming expanded, requiring school leaders to advance in their traditional roles of compliance specialists to become instructional leaders for special education (Smith et al., 2010). In 2017, the Supreme Court case *Endrew F. v. Douglas County School District* [hereinafter *Endrew F.*] redefined FAPE, emphasizing the need for special education leaders to acquire legal literacy and the ability to effectively lead under new guidance (Dieterich et al., 2019). In the course of special education history, the passage of EAHCA, IDEA, and ESSA has increased the legal protections for students with disabilities.

Social Context

At the time of the adoption of the Individuals with Disabilities Act in 2016 (IDEA), 63% of 6.7 million students with disabilities (about twice the population of Oklahoma) were being educated in the general education classroom for at least 80% of their school day (Esposito et al., 2019). School leaders have been spending more time involved in special education related activities than in the past (Lynch, 2012). On March 22, 2017, the *Endrew F.* case addressed how much educational benefit public schools are required to provide students to meet the requirements under IDEA to provide FAPE (Prince et al., 2018). The U.S. Supreme Court decision led special education leaders to develop student goals to employ evidence-based practices to meet the raised expectations for students with disabilities (Asip, 2019). Navigating

special education law and leading special education programming created challenges for special education leaders due to inadequate preparation (Templeton, 2017). The IDEA and ESSA have regulations to protect students with disabilities and their families. ESSA stated, “All students—regardless of ability or classification—achieve academically, behaviorally, and socially” (Leckie, 2016, p. 59). As education is becoming more accessible in society and school districts are being held to higher accountability levels, the workload and expectations placed on special education leaders continue to increase (Asip, 2019).

High attrition rates among special education teachers remain persistent and negatively impact educational outcomes for students with disabilities (Hagaman & Casey, 2018). Pierce (2014) observed that leaders who demonstrated high self-efficacy could strengthen teacher resilience, leading to increased student achievement. Leaders who promote a positive workplace can improve teacher retention and student growth (Reichenberg & Löfgren, 2019). This effort can constructively influence the environment to meet the school community’s needs by implementing these leadership practices. Special education leaders are expected to fulfill their duties and responsibilities and build their capacity to learn and lead as their knowledge and leadership style will directly impact the school community.

Theoretical

The theoretical framework is based on the andragogical adult learning theory and transformative learning theory. The andragogical adult learning theory is defined as the “art and science of helping adults learn” and sets up a framework “adapted to fit the uniqueness of adult learners” (Knowles, 1970, p. 38; Knowles et al., 2012, p. 3). The six assumptions of andragogy for adult learners include the learners’ self-concept, the role of experience, readiness to learn, orientation to learning, motivation, and the need to know, all of which provide a comprehensive

framework to inform management in education (Dachner & Polin, 2016; Knowles, 2015). Adult learners' needs vary based on different life stages (McCauley et al., 2017). The andragogical framework may assist in creating a relevant curriculum to improve leadership preparation programs.

The transformative learning process expands on adult learning theory by focusing on how adult learners use new information to create change (Mezirow, 1997). It is essential to understand the transformative learning process through school leaders' experiences to explain how new knowledge is applied to rapidly changing policy and unexpected situations (Christie et al., 2015). Mezirow's transformative learning theory explains how adult learners make sense of their experiences, how social structures influence that experience, and how dynamics change meaning (Mezirow, 1991). Transformative learning theory promotes critical analytical reflection, a tool for school leaders to critically assess assumptions and to be lifelong learners who can adapt to an ever-changing world (Christie et al., 2015).

Situation to Self

As an elementary exceptional education instructional specialist, I have demonstrated ethical and moral behavior in leading these inclusive and special education programs. The instructional specialist's role is to support teachers and collaborate with administrators to enhance the instructional practices of specialized instruction for students with disabilities. Before this role, I was an elementary coordinator of special education and a special education teacher. The special education coordinator position focused on compliance and ensuring that students' IEP services provided a free and appropriate education. As a teacher of students with disabilities, I provided explicit instruction to students. I experienced how underprepared school administrators were to support general and special education teachers in implementing inclusion,

specially designed programming, and compliance. Most school leaders have a limited formal background in special education; therefore, this factor has motivated me to pursue a leadership position that will allow me to support both inclusive and special education programs. While fulfilling this role as a novice school leader, I learned that leadership requires not only traditional content knowledge but also critical self-reflection to reassess determined values. Mezirow's (1991) transformative learning theory was useful in understanding how adult learners make sense or meaning of their experiences. This theory has contributed to my desire to learn more about school leaders and how their experiences have influenced social structures.

Three philosophical assumptions—epistemological, axiological, and ontological—are inherent in this study to understand the world in which the participants live and work. The epistemological assumption uses subjective evidence from participants (e.g., their personal views) to gain knowledge (Creswell & Poth, 2018). The epistemological assumption supports a social constructivist framework by positing multiple social realities resulting from negotiating social actors' interpretations (Sandu & Unguru, 2017). My epistemological assumption is that participants' experiences will reveal special education leaders' knowledge of learning and leading inclusive and special education programs. Therefore, I will separate out my biases and rely on the participants and their input to draw conclusions about their experiences in learning and leading inclusive and special education programs. An axiological assumption characterizes qualitative research by disclosing the researcher's values and beliefs (Creswell & Poth, 2018). My axiological assumption is that I value leadership preparation for inclusive and special education programming. Therefore, I acknowledge my biases and the significance of adequate preparation and training for special education leaders. The ontological assumption questions the nature of reality (Creswell & Poth, 2018). My ontological assumption is that the participants

have experienced different programs, training, and experiences in their respective roles and will have multiple views. Therefore, I reported different perspectives and themes on leading inclusive and special education programming based on the data collected by participants. The study aimed to understand the school leaders' practices and their derived meaning from their experiences to reveal a pattern (Creswell & Poth, 2018).

For this study, my paradigm is social constructivism. Constructivism began with Kelly's (1995) idea of a personal construct theory, in which individuals create their own version of social reality (Sandu & Unguru, 2017). This is in contrast to social constructionism, which focuses on meaningful stories and creating meaning and not the created meaning (Sandu & Unguru, 2017). Constructionism and constructivism are paradigms that describe how individuals operate within constructs, which are the tools individuals use to find meaning (Sandu & Unguru, 2017). According to Berger and Luckmann (2008), constructs define the various elements of reality resulting from the interaction between the social actors (Sandu & Unguru, 2017). Social constructivism is designed to use individuals' lenses through a view of the world in which they live and work (Creswell & Poth, 2018). I used social constructivism to reveal a theory or pattern of meaning by interpreting the meanings others assign to the world through socialization and interactions (Fine, 2015). I aimed to understand the complexity of school leaders' perspectives and depend on the participants' views of learning and leadership. Sessa et al. (2016) found a relationship between leader identity and the leader's understanding of leadership; however, the study's limitations indicated a need to understand how school leaders engage and practice values after acquiring special education content knowledge. The need to build rapport with the participants and assert ones' values and beliefs is significant in the study since it relies on the participants' transparency and candor. The study revealed the true meaning of the participants'

experiences and arrived at the essence of inclusive and special educational leadership (Creswell & Poth, 2018; Moustakas, 1994).

Problem Statement

The inadequate preparation of school leaders for leading special education and inclusive communities results in negative consequences for special education programming, including decreased student performance and higher teacher attrition rates (Bateman et al., 2017; Bettini et al., 2017; Miller, 2018; Rinehart, 2017; Templeton, 2017; Thompson, 2017). The enactment of the IDEA law in 2004 brought more students with disabilities into the general education classroom, requiring principals to spend more time in special education-related activities (Lynch 2012; U.S. Department of Education, 2006). In light of this, educational researchers should be investigating how well-prepared principals are to lead special education programming because it directly impacts the school culture and academic achievement of students with disabilities (McLeskey, 2020). There is, however, a lack of special education administration research, and the literature exposes some inconsistent themes regarding special education leadership roles, preparation, responsibilities, and development (Thompson, 2017).

Limited information exists on the shared lived experiences of school administrators learning and leading inclusive and special education programs. As this study explored the roles and responsibilities of special education leaders and the development of their leadership styles, it identified the knowledge administrators lack to effectively implement best practices in inclusive and special education programs. The findings can inform policymakers on developing appropriate preparatory programs and learning opportunities to develop school leaders' knowledge and expertise in leading inclusive and special education programs.

Purpose Statement

The purpose of this transcendental phenomenological study was to explore the lived experiences of public school administrators who lead inclusive and special education programs in three districts in Central Virginia. At this stage in the research, the lived experiences of public school administrators who lead inclusive and special education programs will be generally defined as the practices of school leaders learning and leading inclusive and special education programs. The theories guiding this study are Knowles's (2005) adult learning theory and Mezirow's (1971) transformative learning theory as it relates to the experiences of public school administrators learning inclusive and special education programming and applying knowledge in their leadership practice. Asip (2019) suggests that having a deeper understanding of local special education administrators' roles, responsibilities, and perspectives can help prevent special education teacher and administrator shortages. I used public school administrators' experiences of performing responsibilities to provide school districts and institutions of higher education facilities with knowledge about career preparation, hiring, and retention of future special education leaders.

According to Thompson (2017), Crockett et al. (2009) determined that only 24% of studies related to special education leadership roles, responsibilities, preparation, and development. This indicates a need for more research on special education leadership roles, responsibilities, and job training (Thompson, 2017; Crockett et al., 2009). Templeton (2017) found that principals need more training that focuses on improving outcomes through the development and implementation of individualized education plans (IEPs); this study can help identify and fill the gaps revealed by exploring public school administrators' lived experiences.

Knowles's (2015) adult learning theory asserts six assumptions about andragogy, which provide a framework for understanding the needs of a special education administrator for adult learners. The methods of andragogy inform practices to support emerging adult learners transitioning to adulthood (Dachner & Polin, 2016). An andragogical lens can support the implementation of targeted job training for special education administrators to fulfill their roles of leading inclusive and special education programs.

Mezirow's (1997) transformative theory of adult learning explains the relationship between transformative learning and autonomous responsible thinking. Autonomous responsible thinking is a central goal of adult education and refers to the understanding, skills, and disposition necessary to reflect on personal assumptions (Mezirow, 1997). This theoretical underpinning was essential in exploring public school administrators' frames of reference (i.e., the assumptions people use to understand their personal experiences) to improve special education administrators' ability to perform their duties (Mezirow, 1997).

Significance of the Study

The significance of the study flows from its empirical, theoretical, and practical perspectives. This study aimed to learn from school leaders' experiences and arrive at the essence and meaning of their learning experiences of leading inclusive and special education programs (Moustakas, 1994). The theoretical framework provided the structure for understanding school leaders' ability to be independent thinkers and critically reflect on their needs to improve their leadership capacity to lead and support educators in creating effective inclusive and special education programs. Participants in the study may have improved their practices by gaining a comprehensive understanding of their roles and effectiveness in executing daily leadership practices that directly impact student achievement. The research could increase

school district leaders' awareness of obstacles that may need to be addressed for aspiring school leaders and contribute to improving retention of future school administrators and special education teachers.

Empirical Significance

Researchers found that principals' active involvement is critical to school improvement initiatives (Fullan, 2016; McLeskey, 2019). Templeton (2017) examined the difference between principals who were knowledgeable and trained in special education compared to those who had a basic skill set in special education programming. However, there is a discrepancy between special education competencies and themes of special education research (Bateman et al., 2017; Templeton, 2017; Thompson, 2017). In terms of research topics, 35% related to personnel training, professional development, and special education law, but only 24 % of studies related to special education leadership roles, responsibilities, preparation, and development (Crockett et. al, 2009; Thompson, 2017). The low percentages of research conducted on special education leadership demonstrates the need to add to the existing research on special education administrators' roles, responsibilities, and job training (Bateman et. al, 2017; Crockett et al., 2009; Templeton, 2017).

Theoretical Significance

The andragogy framework connects the adult learning process to understanding students' leadership knowledge and experiences through teacher training and deliver leadership courses (McCauley, et al., 2017). Adult learning theory expands on professional learning opportunities using the lens that teachers are adult learners with specific and unique learning needs (Powell & Bodur, 2019). Although relationships exist between understanding adult learners' leadership knowledge and using an adult learning lens to understand the adults' various needs, there is

limited empirical evidence on special education administrators' preparation and development (Bateman et al., 2017; Crockett et al., 2009; Templeton, 2017). Transformative learning considerations have been implied in inclusion and social justice to provide an inclusive belief system of ethical considerations (Mertens, 2007). Mezirow's (1995) transformative learning theory, which focuses on adult learners becoming autonomous thinkers by assessing their values, meanings, and purposes, also explores how teachers can transform the students' learning environment, but researchers have not explored how public school special education leaders use transformative learning theory when leading staff to implement inclusive and special education programs (Yacek, 2020). This study's intent was to further understand adult and transformative learning theories by focusing on special education administrators' specific needs as they apply autonomous thinking, value, meaning, and purpose to leading inclusive and special education programming in their schools.

Practical Significance

The study contributes to the knowledge base regarding school leaders' experiences as they acquire special education knowledge and process this information to lead inclusive and special education programs. Researchers have found that principals' active involvement is critical for creating inclusive and special education school improvement initiatives (Fullan, 2016; McLeskey, 2019). Leadership preparation programs must consider the daily practices used by principals to make decisions for students with disabilities (Rinehart, 2017). One practical application is to provide leaders with critical awareness courses that can increase school leaders' engagement (Brown, 2006; Fine, 2015). This study identifies areas of improvement for leaders, specifically special education leadership, to enrich all students' educational experience.

Research Questions

The phenomenological research questions were designed to align with the problem of practice in school leadership. Formulated to capture the essence and meaning of the human experience, these questions incorporate qualitative behavior and skills, sustain personal and passionate participant involvement, and provide a comprehensive description of experiences (Moustakas, 1994). The research for this study is based on one central question and three sub-questions:

Central research question: How do school leaders describe their professional experiences in leading inclusive and special education programming?

Leaders reflect on their adulthood experiences using values and beliefs that contribute to their decision-making process as school administrators (McCauley et al., 2017). Having direct experience in special education will enable these leaders to excel in leading special education programs resulting in student success (Praisner, 2003; Templeton, 2017)

SQ 1: How do school leaders who lead inclusive and special education describe their experience using special education knowledge to manage inclusive and special education programs?

Andragogy learning theory emphasizes adult learners' experiences as the most valuable resource in their learning (Knowles, 2005). Determining how participants described their experience clarified what content, knowledge, and skills were needed to build their capacity in becoming special education leaders (Knowles, 2005; Thompson, 2017).

SQ 2: How do school leaders describe their experiences of being instructional leaders of specially designed instruction?

The principal's role has changed from operational to instructional leadership (DeMatthews et al., 2019), but administrators report having minimal knowledge regarding specially designed instruction for students with disabilities; therefore, participants needed to describe their experience in supporting specially designed instruction (Esposito et al., 2019).

SQ 3: How do school leaders describe their critical self-reflection experiences when making informed decisions to create inclusive and special environments?

A principal's daily leadership decisions can impact the outcome for students with disabilities, families, and staff (Rinehart, 2017). Critical self-reflection proves to improve leadership practices by providing an opportunity to collaborate and share ideas about changes and establishing new ways of operating (Helyer, 2005). School administrators should be educated about the current laws that affect special education and inclusive programming. Critical self-reflection supports ongoing thinking, acting, and questioning (Helyer, 2005; Knowles, 2015; Thompson, 2017).

Definitions

1. *Adult learning theory*: the “art and science of helping adults learn” that sets up a framework “adapted to fit the uniqueness of adult learners” (Knowles, 1970, p. 38; Knowles, Holton, & Swanson, 2012, p. 3)
2. *Constructive development*: “how people actively construct or make meaning of their experiences; they interpret what happens to them evaluate it using their current perspective and draw conclusions about what those experiences mean to them” (Sessa et. al, 2016, p. 16)

3. *Frame of reference*: a set of assumptions that “encompasses cognitive, conative, and emotional components, and is composed of two dimensions: habits of mind and a point of view” (Mezirow, 1995)
4. *Free and Appropriate Education (FAPE)*: a students’ least restrictive environment (Taylor, 2011)
5. *Individuals with Disabilities Act (IDEA)*: legislation based on the principle that every student, regardless of his or her physical or learning status, is entitled to receive a FAPE (Taylor, 2011)
6. *Leadership*: intentional influence over individuals to structure activities and relationships in a group or organization (Danielsa et al., 2019)
7. *Least Restrictive Environment (LRE)*: the legal requirement that students with disabilities be educated in a context that is as close as possible to a regular education classroom (Underwood, 2018)
8. *Transformative learning*: a theory that explains how adult learners make sense of their experiences, how social structures influence that experience, and how the dynamics change meaning (Mezirow, 1991)

Summary

This chapter provided an overview of understanding school leaders’ learning and how they can effectively transform this knowledge to lead inclusive and special education programs. School leaders are inadequately prepared to lead inclusive and special education, causing the following issues: passive leadership, lower student outcomes, and unsatisfactory inclusive environments (Rinehart, 2017; Templeton, 2017). Understanding special education law is required for school leaders. However, many leaders are unaware of how these laws can impact

special education programs and the way they lead (Bateman et al., 2017). Further studies are necessary to learn about the lived experiences of how school leaders acquire special education knowledge and how these leaders can implement inclusive education. This study examined school leaders' lived experiences as they embarked on leading special education and implement inclusive education programs. The study used a qualitative phenomenological approach to deepen understanding of participants' experience as they lead special education and achieve inclusive education (Creswell & Poth, 2018). The results may be useful in improving students' educational outcomes and can inform policy decisions about the requirements for special education leaders and the development of university-based preparation programs.

CHAPTER 2: LITERATURE REVIEW

Overview

The purpose of this qualitative transcendental phenomenological study is to describe the experiences of public school administrators who lead inclusive and special education programs in three districts in Central Virginia. This chapter presents a detailed review of the literature to identify and understand school leaders' roles and responsibilities in preparing to lead inclusive and special education programs. The first section discusses the theoretical framework and how it relates to the phenomenon. The second section synthesizes the current literature relevant to special education leadership. The school leader is viewed through the assumptions of andragogy that focus on the following factors: the learner's self-concept, the role of the learner's experiences, readiness to learn, orientation to learning, and their motivation to learn (Knowles, 2015). Following the school leaders' experiences in special education leadership programs, the literature reviews those leaders' challenges and discusses implementing instructional leadership, complying with special education law, promoting high teacher efficacy, and addressing teacher attrition. Lastly, the review incorporates transformative learning as a critical self-reflection process that emphasizes that learning translates to action. Based on the literature review, a gap in the literature is apparent, indicating the need for further research.

Theoretical Framework

A theoretical framework guides a research study by using the original theorist to explain, predict, and lead the study (Creswell & Poth, 2018). Adult learning theory was introduced by Knowles and later revised to distinguish between pedagogy and andragogy (Knowles, 2015). Knowles (1980) defined pedagogy as the art and science of teaching and andragogy as the art and science used to aid others in learning. The theoretical framework distinguished pedagogy

from andragogy and asserted that adult learners are different from child learners based on six main assumptions:

1. The need to know: “Adults need to know why they need to learn something before undertaking to learn it” (Knowles et al., 2015, p. 43).
2. The learners’ self-concept: “Adults have a self-concept of being responsible for their own decisions, their own lives. Once they have arrived at that self-concept, they develop a deep psychological need to be seen by others and treated by others as being capable of self-direction” (Knowles et al., 2015, p. 44).
3. The role of the learners’ experiences: “Adults come into an educational activity with both a greater volume and a different quality of experience from that of youths” (Knowles et al., 2015, p. 44).
4. Readiness to learn: “Adults become ready to learn those things they need to know and be able to do to cope effectively with their real-life situations” (Knowles et al., 2015, p. 45).
5. Orientation to learning: “In contrast to children’s and youths’ subject-centered orientation to learning (at least in school), adults are life-centered (or task-centered or problem-centered) in their orientation to learning. Adults are motivated to learn to the extent that they perceive that learning will help them perform tasks or deal with problems they confront in their life situations” (Knowles et al., 2015, p. 46).
6. Motivation: “Adults are responsive to some external motivators (better jobs, promotions, higher salaries, and the like), but the most potent motivators are internal pressures (the desire for increased job satisfaction, self-esteem, quality of life, and the like)” (Knowles et al., 2015, p. 47).

This literature review evaluates the advancement of school administrators’ roles and

examines the structure of educational leadership programs and district-level professional development for inclusive and special education programming using the assumptions of andragogy. The andragogical framework suggests that the best practices in adult learning provide these learners with principles of elevated levels of involvement in planning, experiential learning, relevance, and pragmatic application (Knowles, 1984). Adult learning theory can guide new programming for adult education by revising the current educational leadership programs that do not include relevant content and experiential learning. That would better prepare these leaders to develop effective special education programs (Miller, 2018).

Mezirow (1978) introduced adult learning theory to describe how adults change their interpretation of the world. Mezirow's (1991) transformative learning theory expanded on Knowles's (1984) andragogical framework. This theory of transformative learning is supported by human communication, where "learning is understood as the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one's experience to guide future action" (Mezirow, 1996, p. 162). Transformative learning theory discusses special education leaders' experiential learning process during the creation of leadership programs, district-level professional development, and leading inclusive and special education programs. Transformative learning is based on four elements: how adult learners make meaning of experiences, the nature of the structures that influence adults' understanding of their experience, the dynamics involved in modifying meanings, and how structures of meaning change when learners find them to be dysfunctional (Mezirow, 1991). The process of adult education includes reflection and action (Mezirow, 1990). Based on adult learning theory, learners who participate in adult education ascribe the meaning of their experiences during the critical process of reflection and action (Mezirow, 1990, 1991). Rinehart (2017) expressed the importance of

experimental learning and how it can impact leaders' decisions related to enhancing the experiences of students with disabilities and the students' family and school community.

Leadership preparation programs and professional development can be more effective when leaders receive special education training (Thompson, 2017). Transformative learning changes peoples' perspectives and challenges learners' assumptions about the world (Brown, 2006). Mezirow (1998) described adult learning in four ways: elaborating existing frames of reference, learning frames of references, transforming points of view, and transforming the mind's habits supported by critical reflection. Aspiring leaders lack self-learning and constructive development, which is how leaders would make meaning of their experience, interpret what happens to them, evaluate it using their current perspective, and conclude what those experiences mean (Sessa et al., 2016). This study adds to existing research using the transformative lens to explore special education school leaders' perspectives, values, and experiences and how they can help or hinder learning and leading inclusive and special education programs.

The transformative learning theory lens extends previous research by studying public school leadership using adult learning theories. According to Mezirow (1995), educators must help learners become aware of and critical of their own and others' assumptions. How school leaders communicate their vision on inclusion and special education impacts students' outcomes, teacher efficacy, and teacher retention. The principals' transformational leadership is directly related to teachers' job attitudes and also influences teachers' self-efficacy (Thomas et al., 2020). New information is a resource in the adult learning process, and new information must be utilized in a symbolic frame of reference (Mezirow, 1995). Frames of reference involve thoughts, feelings, and disposition; hence, transformative learning theory expands the study to understand

how school leaders use autonomous thinking and develop their leadership approach for achieving positive outcomes for marginalized students.

This study examined school administrators' lived experiences as they learn to lead while implementing inclusive and special education programs. Principals are considered instructional leaders for all students; however, the literature indicates that principals lack the coursework and field experience needed to understand how to create an appropriate environment for students with disabilities (Bateman et al., 2017; Rinehart, 2017). School leaders who are active leaders of special education and inclusive programs can provide university-based programs with the data needed to enhance district-level professional development for other administrators (Templeton, 2017). The research method is supported by the six pillars of the andragogical framework. The aim was to reveal how leaders learn and experience transformative learning to reposition their values and beliefs as they lead the implementation of inclusive and special education.

Related Literature

Educational leaders require opportunities to engage in experiential learning to support leading inclusive and special education programs (Miller, 2018; Rinehart, 2017). School leaders can learn how to drive inclusive and special education from the shared experiences acquired from life, preparation programs, professional development, and job experiences (Brown, 2006; Miller, 2018). The related literature includes information on school administrators' leadership standards for general and special education leaders accompanied by a guide school leaders' can use in their daily practice involving special education policy and law, special education programming, and inclusive culture. This section includes a review of the integration of leadership characteristics on special education, teacher efficacy, and teacher retention. Lastly, the literature review discusses administrator and school leaders' leadership preparation programs,

competencies, and professional development, concluding with a summary to identify the literature gaps.

The Role of School Leaders

School leaders, including principals or other leveled leaders that lead special education, have the responsibility of balancing instructional leadership with procedural compliance (Asip, 2019). Traditionally, school leaders are known as administrators, indicating a hierarchical organizational system position (Connolly et al., 2019). The term *school leader* carries a different connotation from *administration* and *education management* because school leaders are positioned higher in the organizational hierarchy, assume the organization's heavier responsibility, and delegate (Connolly et al., 2019). In this study, *school leader* is used synonymously with *education leadership* to emphasize the leader's influence, which transcends hierarchical relationships. This study explores the roles and responsibilities of school leaders but keeps the primary focus on the leadership characteristics used to influence teams to move beyond the organizational structures that can be rigid and inflexible in order to influence all the constituents involved in leading and implementing inclusive and special education programs.

Role clarity for school leaders positively impacts perceived autonomy, adaption to change, planning activities, and facilitation of teamwork (Brandmo et al., 2019). The IDEA of 2004 outlined guidelines specific to education and licensure requirements for special education teachers. No specific guidelines exist for special education leaders, but a school leader's role necessitates a degree of inflexibility, such as in following federal and state mandates. The legislation requires principals to devote more to activities related to special education than in the past (Lynch, 2012). Principals are required to participate in (a) special education department meetings, (b) individualized education plan (IEP) meetings, (c) special education teacher

observations, and (d) review of special education lesson plans (Lynch, 2012). School leaders continue to report that, upon entering their profession, they had limited knowledge of their role in addressing quality instruction for students with significant disabilities (Esposito et al., 2019).

The Interstate School Leaders Licensure Consortium (ISLCC) standards were developed in 1996 and implemented in 2008. The revised ISLCC standards were “aspirational standards that recognized [that] the changing world in which educational leaders work today would continue to transform” and took into account developing human relationships and increasing student outcomes (National Policy Board for Educational Administration, 2015, p. 3). Then the National Policy Board for Educational Administration adopted revised criteria (Council of Chief State School Officers, 2015). These 10 revised standards are expected to be attained before an administrator receives a position and must be maintained while in that role. A related set of professional standards—from the Council for Exceptional Children (CEC)—is not as widespread (Templeton, 2017). School administrators that lead special education programs have similar leadership principles. Both categories of leaders are expected to implement standards from the National Policy Board for Educational Administration (2015) to guide their daily practice. The CEC’s Advanced Preparation Standards for Special Education Administration include (a) assessment; (b) curricular content knowledge; (c) programs, services, and outcome; (d) research and inquiry; (e) leadership and policy; (f) professional and ethical practice; and (g) collaboration (CEC, 2015).

The CEC standards align with the ideologies of increasing student outcomes. According to the advanced preparation standard, school administrators should use valid and relevant assessment information in assessment instruments, methods, and procedures for both individuals and programs (CEC, 2015). The previously learned experiences of the school administrator

inform their ideas about the delivery of education services, which impact their decision making regarding prereferral and screening, pre-placement for special education eligibility, and monitoring and reporting learning progress in the general education curriculum and other individualized education program goals (CEC, 2015). Knowles (2015) asserts that adult learners use their background knowledge and experiences during their learning process, which will help to efficiently support students' individual needs (Bateman et al., 2017).

Results Driven Accountability (RDA, 2014) and other legislative reforms such as Every Student Succeeds Act (ESSA; 2015) and the Individuals with Disabilities Act (IDEA, 2004) identify additional responsibilities of both special education administrators and other school leaders (Boscardin et al., 2018). The National Policy Board for Educational Administration (2015) and the CEC (2015) require school administrators to improve programs, supports, and services at the classroom, school community, and system levels. Asip (2019) conducted a literature review and found that school administrators spend most of their time using data to make program-related decisions and interpret, plan, and implement programs consistent with special education regulations and policies. The school administrator's role is to develop a deep understanding of how to coordinate educational standards to meet the needs of individuals with exceptionalities for meaningful and challenging learning (CEC, 2015).

Special education standards pinpoint key elements regarding programs, services, and outcomes. School leaders develop programs and services to understand the individual learners' cultural, social, and economic diversity as they determine which components will be used to improve programs, supports, and services for individuals with exceptionalities (CEC, 2015). Special education administrators are encouraged to support the growth of Data Based Intervention (DBI) (Steinbrecher et al., 2015). DBI is a systematic method for targeting

interventions by using data to determine when and how to make adaptations that will change the likelihood of positive student outcomes (Steinbrecher et al., 2015). Several resources are available to assist in implementing DBI, including scripted teaching programs that are data-based driven; DBI can yield positive results when done with fidelity (Lemons et al., 2019).

School administrators should remain current on trends in special education. The expectation to continuously participate in research and inquiry is expected for school administrators to facilitate general and special education programs, supports, and services at the classroom, school, and system levels for individuals with exceptionalities (CEC, 2015). Knowles's (2015) learning theory exemplifies the school administrator's ability to apply the andragogical assumption of orientation to learning to implement evidence-based practices to improve programs, services, and support for individuals. Knowles's (2015) approach acknowledges that the adult learner, in this case, the school administrator, will need to be motivated to find a purpose for learning the CEC (2015) guidelines to conduct, evaluate, and use inquiry to guide professional practice. The need to foster continuous improvement aligns with adult motivation and orientation to learning (Knowles, 2015).

According to the CEC (2015), leadership policy aims to formulate goals to meet high professional expectations, to advocate for effective policies and evidence-based practices, and to create a positive and productive work environment. High professional standards are described for both special education administrators and principals. Standard 1 of the Educational Leadership Standards promotes every student's success by facilitating the development, articulation, implementation, and stewardship of a vision of learning shared by all stakeholders (National Policy Board for Educational Administration, 2015). Special education policy continues to evolve and requires school leaders to always be willing to learn and ready to change to meet

students' needs (Steinbrecher et al., 2015). Educational standards were revised to encourage leaders to “transform” their leadership (National Policy Board for Educational Administration, 2015, p. 3). The attitude of being motivated and willing to learn will prepare school leaders to understand the deep knowledge base specific to inclusive special education and relevant laws (Esposito et al., 2019).

Professional and ethical standards inform leaders about special education practice and their need to engage in lifelong learning, advance the profession, and perform leadership responsibilities to promote professional colleagues and individuals with exceptionalities (CEC, 2015). According to the Professional Standards for Educational Leaders (2015), effective educational leaders cultivate an inclusive, caring, and supportive school community that promotes each student's academic success and well-being (p. 13). Special education law requires a high ethical practice to adhere to legal mandates specifically to implement IEPs and DBI instruction (Bateman et al., 2017). School leaders need to uphold professional and ethical leadership to promote change and effectively share a common vision to create inclusive and special programs that are safe and culturally compatible for students and families. Mesriow's (1998) transformative learning theoretical framework challenges future leaders to become aware of oppressive structures and practices and asserts that adult development in leadership requires increased awareness and critical reflection.

Leading collaboration is critical for school leaders. Bateman et al. (2017) assert that the principal is the leader of the entire school. The CEC (2015) details the significance of collaboration with education colleagues, families, related service providers, and others from the community to use collaboration to promote understanding, resolve conflicts, and build consensus. Collaboration impacts many facets, including building inclusive communities that are

culturally responsive and professional development that enhances teachers' skills and effectiveness (Bettini et al., 2016; Cameron, 2016; Done et al., 2016). A critical component of leadership is facilitating collaboration, which is a best practice in educational leadership. Strong (2019) describes a skillful special education administrator as one who has strong interpersonal ability and advanced knowledge of instructional methods.

Special Education Law

Special education law continues to develop and adjust to societal needs; therefore, the special education leader's role requires an acquired knowledge of the past, present, and vision for special education. Several significant court decisions have shaped inclusive and special education. In *Beattie v. Board of Education* (1919), a board of education prohibited a student with a disability from attending school with his peers; in cases such as these, it focused on exclusion practices, isolation, and elimination of disruptions for peers without disabilities (Kirby, 2017). The pivotal *Brown v. Board of Education* ruling paved the way for special education and shattering barriers for students with disabilities by finding that "separate" is inherently unequal (Kirby, 2017). Public Law 94-142 (the Education for All Handicapped Children Act of 1975), guaranteed a free, appropriate public education to each child with a disability in every state and locality across the country. As defined by the U.S. Department of Education (2007), *free appropriate public education* is a term that means special education and related services that (a) have been provided at public expense under public supervision and direction and without charge, (b) meet the standards of the state educational agency, (c) include an appropriate preschool, elementary school, or secondary school education in the state involved, and (d) are provided in conformity with an individualized education program.

This foundational law related to special education has undergone several amendments,

and in 1990 this law would be amended and enacted as the Individuals with Disabilities Education Act (IDEA). Since 2004 the law was reauthorized as the Individuals with Disabilities Improvement Act (IDEIA) (Hallahan et al., 2012), which embedded inclusive practices to ensure that regardless of the disability, children aged 3 to 21 can receive FAPE. Parents have more rights under IDEIA and can advocate for their children. In this review, the acronym IDEA is used for both laws for the sake of consistency. The Every Student Succeeds Act (ESSA) extends supports to special education students by advancing equity and providing funds to support special education (ESSA, 2015). As previously outlined in the Preparation Advancement Standards for Special Education leaders, special education law compliance is critical for developing special education programming. The *Board of Education v. Rowley* (1982) ruling established the procedures for FAPE, and from this outcome, a substantive standard was developed for FAPE (Zirkel, 2020). As special education law continued to advance, in the 2004 amendments of the IDEA, denial of FAPE violations determined stricter outcomes, including a hearing officer or court to order corrective action or procedural violations (Zirkel, 2020). The standards that had been used for 35 years to determine the appropriateness of FAPE changed (Dieterich et al., 2019) with the 2017 ruling in *Andrew F.*, which required an educational program to be appropriately ambitious with goals that may differ between students with disabilities and to provide students the opportunity to meet challenging objectives (Dieterich et al., 2019).

The adoption of the IDEA increased the number of students with disabilities educated in the general education classroom such that by 2018–2019 around 7.1 million students between the ages of 3 and 21 were receiving special education services. (U.S. Department of Education, 2020). According to Kirby (2020), special education needs to move beyond the “fix the deficit”

mentality and examine the impact of environmental factors. Due to mandates, school administrators must apply previously learned standards to ensure they adhere to the latest revisions of mandates to increase educational benefits for students with disabilities.

Individualized Education Plans

A student eligible for an IEP has met the criteria for one of 13 disabilities: mental retardation, hearing impairment (including deafness), speech and language impairment, visual impairment (including blindness), emotional disturbance, orthopedic impairment, autism, traumatic brain injury, other health impairment, specific learning disability, deaf-blindness, or multiple disabilities (IDEA, 2006). The IEP aims to provide services for the child to learn by meeting and tailoring their instructional needs to meet curriculum requirements (Pounds & Cuevas, 2019). Lentz (2012) asserts that the IEP is the most important educational tool and is critical to the student's academic success. According to Thurlow et al. (2013), school leaders are responsible for building the IEP teams' capacity for decision making and monitoring the outcomes. The IEP is the legal document that describes the educational services a student receives; it is clear, useful, and legally defensible (Hallahan et al., 2012). A special education leader's critical responsibility is to monitor and develop the decision-making process during IEP development and implementation (Thurlow et al., 2013).

A team to develop an IEP consists of the parent(s), designee, special education teacher, general education teacher, student, and related services providers. The IDEA does not define their role or how the meeting is to be conducted (Lentz, 2012). In 1997 the IDEA was revised to emphasize the students' role during the IEP process (Pounds & Cuevas, 2019). Each person's role is essential to the development of the IEP. However, the special education leader facilitates proposing student-specific goals, services, and accommodations that match the vision that the

IEP team has for the student (Lentz, 2012). Beck & DeSutter (2020) found that the facilitator plays a critical role before the IEP meeting through the planning process and during the meeting by encouraging participants to be articulate, prepared, and student centered. Special education administrators and designees facilitate IEP meetings and have the duty to empower parents as equal partners in the IEP development process, as initially intended by the IDEA of 1994 (Singh & Keese, 2020). Leaders who design IEPs will make decisions regarding strategies that foster increased expectations to ensure students' opportunities to make considerable progress (Asip, 2019; Lentz, 2012).

Special Education Programming

After the IEP is developed, it is implemented and monitored to fit the student's individual needs. "The essential function of an IEP is to set out a plan for pursuing academic and functional advancement" (*Andrew F. v. Douglas County School District*, 2017, p. 992). The special education programming uses the annual goals previously identified by the IEP to target the deficit area and monitors progress through systematic data collection (Jozwik et al., 2018). Consistent with leadership standards, school leaders will need to make informed decisions to create curriculum access and utilize highly structured programs to remediate students with severe and persistent academic issues (CEC, 2015; D. Fuchs & Fuchs, 2015). Federal law (e.g., IDEA, 2004) requires that each student's IEP include "a statement of measurable annual goals, including academic and functional goals designed to meet the child's needs that result from the child's disability to enable the child to be involved in and make progress in the general education curriculum" [x 300.320 (a) (2) (i) (A) and (B)]. According to Pregot (2021), most principals have generic school leadership experiences and training but have low self-perceived knowledge of specific special education functions such as response to intervention (RTI). Researchers estimate

that between 3% and 5% of the general population will demonstrate inadequate responses to remediation efforts (D. Fuchs et al., 2014). Principals using generic leadership knowledge are ill-advised to lead staff to go the general remediation efforts or general instructional practices to guide systematically designed instruction (SDI) (McCluskey et al., 2018). There are times when school administrators find it more efficient to delegate their special education related tasks. Still, it can negatively impact the quality of education received in special education programs or cause inappropriate placement and miscategorization (Obiakor, 2006). Students with severe disabilities represent less than 2% of the student population, have diverse learning and behavioral characteristics, require significant support, and may require alternate assessments (Finnerty et al., 2019; Kurth et al., 2015). Steinbrecher et al. (2015) emphasize that special education administrators are in the position to develop additional special education programs that consist of individualized data-based plans. Systemically designed instruction is scientifically based and refers to teaching that is carefully and logically sequenced toward a specific goal. Federal policy has paved the way for increased emphasis on scientifically based instruction for students with significant cognitive disabilities (2016). Effective instructional strategies help achieve higher student outcomes and must be included in students' IEPs (McLeskey et al., 2018). Special education programming provides adaptations in practice known to support students with severe disabilities to access inclusive classrooms (Finnerty et al., 2019). Research findings revealed three themes for inclusive education programming: (a) tangible, (b) student centered, and (c) blended with classroom materials and instruction (Finnerty et al., 2019). Curriculum access is essential for students with disabilities. Studies show that general education teachers and special education teachers require special education leaders to guide instruction to general content and IEP goals (Petersen, 2016).

Inclusive Education

The advancement of equity and inclusive education began with the ruling in *Brown v. Board of Education* in 1954 during social unrest, leading to the civil rights movement in the 1960s (Kirby, 2017). These events resulted in the disability rights movement, which led to the passage of the Architectural Barriers Act of 1968 and Section 504 of the Rehabilitation Act of 1973 (Kirby, 2017). The foundation of inclusive education is viewed through the lens of equity and aims to meet the needs of all learners and families (Vostal et al., 2019). According to Kirby (2012), inclusion is defined as learning with peers.

Leadership is essential to create an inclusive community that meets the learners' academic, behavioral, and emotional needs (Boscardin, 2007). Inclusive school leaders are responsible for providing pedagogy that supports the overall differences between students while avoiding marginalization associated with personalized supports (Florian & Beaton, 2017). Inclusive practices endorse integrating activities to include non-disabled peers and students with special needs that require individualized attention (Taylor, 2011). Through the lens of transformative learning, leading inclusive education is a “process of reflection and action,” allowing leaders to make changes that will transform the system (Mezirow, 1990, p. 354). Tracy-Bronson (2020) found a connection between inclusive education and social justice education, which expands inclusive education’s significance to respond to current events in the local community. There is no specific law for inclusive education; however, both the IDEA and Section 504 help set an example of using moral leadership to advance inclusive education principles (Kouses & Posner, 2012; Taylor, 2011).

Response to Intervention (RTI) is a recent movement within special and inclusive education to serve as a framework for assessment, intervention, and decision-making in special

education (Castro-Villarreal et al., 2014). The first appearance of RTI was proposed by L.S. Fuchs and Fuchs (2014) it was a medical model that offered a multitiered approach for early readers to help address racial inequities in special education (Willis, 2019). The RTI model's significance is to monitor individual progress to support students with or without disabilities and distinguish between culturally and linguistically diverse students with or without disabilities (Castro-Villarreal et. al, 2014; Villarreal & Sullivan, 2016). According to (Raben et al., 2019), the number of students categorized with a learning disability decreased. However, the study explored other factors, which demonstrated the continued efficacy of multitiered student support programs.

School culture influences principals' effectiveness as school leaders. A school principal's role is to create a school culture for all learners to feel safe, secure, and a part of the community (DeMatthews et al., 2019). School administrators that embrace multicultural practices and leadership promote self-confidence in others and encourage those around them to be their authentic selves (Obiakor, 2006). The school culture is intertwined with the school community; hence, having leaders who can lead all stakeholders to share a shared vision is vital for leading inclusive education (Carter & Abawi, 2018). Esposito et al. (2019) assert that school leaders must be prepared to play a pivotal role in implementing inclusive practices because it establishes a school culture that influences students' achievements and values in inclusive educational settings. Inclusive leaders are culturally responsive in practice and avoid categorizing students; instead, they "encourage the individualities and build on them to create a multifaceted, multicultural, multi-talented learning community" (Obiakor, 2006, p. 27). Complexities make it challenging for school leaders to perform their roles and responsibilities in leading inclusive education. Bai & Martin (2015) found that school leaders have limited time to participate in

professional development that focuses on leading inclusive education, resulting in leaders not being prepared to lead the schools they serve. Therefore, understanding how school leaders approach these challenges and what tools they use to ensure an inclusive community is vital to know in this study to improve inclusive education practices and narrow the focus on enriching inclusive leadership. School leaders want to lead inclusive education properly, and we can further assess and learn about school leaders' experiences by studying their leadership preparatory experiences.

Leadership Characteristics

School leadership is second to teachers' impact on students' learning; hence, a school leader's character will influence both teachers and students (Brown, 2006). Leaders' desire to move beyond content knowledge and transform knowledge into action will create schools that promote and establish social justice and inclusive communities (DeMatthews et al., 2019; Mezirow, 1990). Rapp (2002) asserts that leaders who take the risk to implement higher moral callings understand that leadership represents values. Burns (1978) asserts that leadership is more than coercion, and ethical leadership goes beyond everyday wants and needs to reach higher levels of reasoned conscious values. According to Stone et al. (2004), transformational leaders transform followers' values to support the organization's vision and goals by fostering an environment where relations can be formed by establishing a climate of trust in which vision can be shared. Moral leadership paves the way for leaders to take responsibility for their leadership characteristics to help meet followers' needs (Cetin & Kinkik, 2015). Transformational leadership includes inspirational motivation, intellectual stimulation, and individualized consideration (Cetin & Kinkik, 2015). Complementary to transformational leadership is transitional leadership or the "effective middle ground" (Boscardin et al., 2018 p. 79). The

purpose of transitional leadership is to provide school leaders an opportunity to address leaders' daily duties while developing the skills of communicating the vision, mission, and values involved in special education programs and services (Boscaradin et al., 2018).

Extensive studies of leadership characteristics exist. Kouses and Posner (2012) participated in thirty years of global research and discovered commonalities based on leaders' lived experiences. Their study identified what they called "five practices of exemplary leadership": modeling the way, inspiring a shared vision, challenging the process, enabling others to act, and encouraging the heart. Modeling the way consists of understanding personal guiding principles by "clarifying values by finding your voice" (Kouses & Posner, 2012, p. 16). After building the foundation of guiding principles, a leader must "affirm the shared values of the group" and "set the example by aligning actions with shared values" (Kouses & Posner, 2021, p. 17). This is consistent with Burns's (1978) assertion that moral leadership reaches higher levels of reasoned conscious values. Leading inclusive and special education challenges leaders to model the way for ethical behaviors. Inspiring the vision is the leader's ability to share his or her excitement about a vision for the future and "to enlist others in a common vision by appealing to shared aspirations" (Kouses & Posner, 2012, p. 18). Burns (1978) emphasizes that leadership is an aspect of power; however, it goes beyond being solely concerned with achieving personal goals, and good leaders tend to the need of their followers.

Research supports that leadership style impacts teachers' job attitudes, particularly the leader's charisma or inspirational motivation, enabling him or her to inspire and motivate employees to commit to reaching common goals (Conley & You, 2017; Wiyono, 2018). Challenging the process requires leaders to take risks. Kouses & Posner (2012) assert that those leaders need to "search for opportunities by seizing the initiative and by looking outward for

innovative ways to improve” (p.20). When leaders take risks, they can lead their staff to complete innovative projects and increase their confidence (Kouses & Posner, 2012). Burns (1978) asserts that leadership can be taught. School leaders’ role as instructional leaders of inclusive and special education is challenging to be innovative as they work to support all learners (Templeton, 2017; Rinehart, 2017).

Enabling others to act calls for team effort. Kouses and Posner (2012) found that leaders “foster collaboration by building trust and facilitating relationships” (p. 21). By enabling others to act and building relationships, leaders produce more leaders. As with the collaboration outlined by the CEC’s Standard 7, special education leaders collaborate with stakeholders to improve programs, services, and outcomes for individuals with exceptionalities and their families. The partnership allows leaders to produce more leaders that are willing to take risks, make changes, and keep organizations and movements alive (Kouses & Posner, 2012).

The final practice of exemplary leadership is to encourage the heart. Leaders can accomplish this through recognition. Kouses and Posner (2012) assert that leaders can create a culture of “celebrating the values and victories by creating a spirit of community” (p. 24). An attribute of transformational leadership is that leaders treat each employee as a unique individual with genuine and authentic interest (Paffen, 2011). The research found that teachers who perceived their school leaders as characterized by supportive behavior, unobstructed vision, and teacher recognition were less likely to feel they might leave teaching or transfer to another school (Conley & You, 2017). Of the various leadership characteristics, transformational leadership and the “five practices of exemplary leadership” are behaviors that help to ignite change and support the relationship growth that causes improvement in special education programs and inclusive communities (Burns, 1978; CEC, 2015; Kouses & Posner, 2012).

In this study, leadership style is essential to understand because leadership level directly impacts teacher retention and overall outcomes for students with disabilities (Rinehart, 2017; Wiyono, 2017). Transformational leadership provides teachers with the intrinsic motivation to teach and be more committed to the school and to experience overall job satisfaction (Thomas et al., 2020). Furthermore, school administrators are required to differentiate between effective and ineffective special educators and use evidence-based versus nonevidence-based teaching practices (Boscardin & Lashley, 2012). Results from demonstrating transformational leadership had a statistically significant relation with professional, collegial support, showing teachers' reliance on their leaders to provide professional support (Thomas et al., 2020). This information is consistent with a lack of knowledge of effective evidence-based special education practices, causing school administrators to provide inaccurate, unreliable teacher evaluations for special educators leading to higher special educator attrition rates (Steinbrecher et al., 2015). Exploring how special education administrators were prepared and their perception of preparation will inform researchers how to identify the gaps of knowledge that are apparent for special education administrators in understanding how to support special educators' roles in their schools (Steinbrecher et al., 2015).

Teacher Self-Efficacy

Leaders' ability to develop a positive school-level environment and make authentic relationships will improve job satisfaction and teacher self-efficacy (Aldridge & Fraser, 2016; Kouses & Posner, 2012). Bellibas & Liu (2017) found that principals influence teacher self-efficacy by being involved in the activities that improve teaching and learning in their schools. Teacher efficacy is concerned with teachers' beliefs about their ability to affect student performance, and teacher self-efficacy describes teachers' judgment or thinking about their

capacity to teach (Aldridge & Fraser, 2016). Teachers have higher teacher-efficacy in instructional delivery and student engagement when the school leaders are proactive and directly involved in the instructional leadership practice (Bellibas & Liu, 2017). The research revealed that principals' approachability and support of staff contribute both directly and indirectly to teachers' self-efficacy and job satisfaction (Aldridge & Fraser 2016). A study of leadership identity revealed the significance of faculty, staff, administrators, and coaches developing prospective leaders by being aware of their leadership identity and their ideals of leadership (Sessa et al., 2016). Wiyono's (2018) research analysis found a significant influence of the principal's transformational leadership development on teachers' work motivation and school improvement. Leaders should be aware of the importance of developing teachers' self-efficacy because it influences how teachers work with challenging students and increases teachers' persistence and commitment to improving students' outcomes (Mireles-Rios & Becchio, 2018). As outlined in their "five exemplary practices of leadership," Kouses and Posner (2012) emphasize the significance of "encouraging the heart" by authentically recognizing staff. The leadership principle connects to Mireles-Rios and Becchio's (2018) findings that self-efficacy and teacher evaluations provide a deeper understanding of the importance of helpful feedback.

Teacher Retention

The retention of highly qualified special education teachers continues to be a nationwide problem (Conley & You, 2017). Increased teacher attrition rates negatively impact the educational outcome for students with disabilities (Hagman & Casey, 2018). Research supports that school leaders play a role in reducing the factors that contribute to the high attrition of special education teachers and a lack of school leaders' support is the primary reason for special educators leaving the profession (Conley & You, 2017; Player et al., 2017). Billingsley (2004)

reviewed 20 studies from 1992 to 2002 that revealed factors that influence special educators to leave: (a) teacher background characteristics; (b) work environment factors; and (c) affective reactions to work. There is a significant need for school leaders to be prepared to lead special educators by having the ability to recognize the best teaching practices to support inclusive and special education programming (Steinbrecher et al., 2015). Thomas et al. (2020) found that transformational leadership positively affects beginning teachers' job attitudes by adding more support for the teacher. Hence, school administrators need to be equipped to manage and operate the school and understand special educators' roles to positively impact teachers' attitudes (Bettini et al., 2017; Smith et al., 2010).

Many school leaders that participate in preparation programs report that they did not receive exposure to special education coursework and are not comfortable managing special education-related issues (Bateman et al., 2017). An absence of targeted preparation for competent, evidence-based special education practices leads school administrators not to provide effective teacher evaluations and increases teacher attrition rates (Steinbrecher et al., 2015). Administrators who offer positive and efficient evaluations and sustain mentorships can increase teacher retention (Bettini et al., 2015). As the role of school leaders continues to expand, learning specialized and inclusive education knowledge and developing their leadership will continue to impact teachers' self-efficacy and teacher attrition.

Knowledge gained from this study could directly impact teacher retention. According to the Virginia Department of Education (2020), there is a shortage of experienced, qualified teachers teaching in special education classrooms or disadvantaged classrooms. The existing literature highlights the impact that school leaders have on teacher efficacy and teacher retention. School leaders need advanced knowledge of instructional knowledge, which correlates most

closely to supporting increased teacher efficacy and retention (Bellibas & Liu, 2017; Hagman & Casey, 2018; Strong, 2019).

School Leadership Preparation

School leaders participate in preparation programs to acquire skills to learn knowledge competencies. Angelle and Bilton (2009) found that principal preparation programs failed to increase special education knowledge by lacking special education coursework (Bateman et al., 2017). A review by Pazey and Cole (2013) found that special education is not given the time it requires in leadership preparation programs and that these programs lack critical discussion to “embrace a social justice model of leadership” (p. 243). Furthermore, college professors do not provide a balanced perspective in leadership programs and have been found to indiscriminately influence teachers and leaders to develop attitudes that prevent diverse learners from a quality education (Dantley, 2005; Obiakor, 2006; Voltz, 1999). Influence is essential for preparation programs since Yukul (2002) found that influence can be controversial for outcomes and ethics (Wanjiru, 2021). School leaders must be prepared to address multicultural students’ overrepresentation and identification process for special education programming (Obiakor, 2006).

Templeton’s (2017) study found that low scores from results-driven accountability systems designed to monitor student progress support principals’ need to receive special education instructional training. Rinehart’s (2017) study, consistent with the findings from Angelle and Bilton (2009), concluded that school administrators lack substantive knowledge about special educators’ classroom roles, classroom practices, and teacher evaluations, all of which are essential factors in attrition rates. Miller’s (2018) study found that the study participants did not value educational leadership programs; the participants reported their best

preparation for and their administrative positions was on-the-job training. Bateman et al. (2017) conducted a review of the National Council for Accreditation of Teacher Education (NCATE), Teacher Accreditation Council (TEAC), Council for the Accreditation of Educator Preparation (CAEP), and ISLCC. They found that no standards were specific to special education preparation. Preparation programs need to include coursework with consistent special education competencies, skills, and standards required to prepare leaders for special education and inclusive settings (Bateman et al., 2017; Billingsley et al., 2014). Knowles (2015) and Mezirow (1990) emphasize the significance of learning from experiences and encourage authentic and experiential learning. The revision of current preparation programs focuses on using cohort models, distributed or transformational leadership, professional learning communities, and interpersonal skills (Miller, 2018).

Knowledge Competencies

Bateman et al. (2017) assert that principals need to be competent and have knowledge regarding special education and the processes used to determine special education programming for students found eligible under IDEA criteria. The CEC provided Advanced Preparation Standards for special education leaders, but those are not consistently used as school leadership requirements (Asip, 2019). The knowledge and competencies have a wide range and have not been narrowed to a specific skill. Thompson (2017) identified 25 competencies in a study about effectively leading special education programs. School leaders were least proficient in interpreting case law based on federal, state, and local policies; however, this is a significant area of need to lead special education programs (Thompson, 2017). Providing FAPE and high leverage practices considering *Endrew F.* requires leaders to navigate policy quickly and to respond appropriately to the new law (Asip, 2019; Dietrich et al., 2019). Leadership

characteristics impact the ability to lead inclusive and special education. The competency and effectiveness of the school leader's capacity to support and guide the inclusive and special education instructional programming requires leaders to have a solid foundation of leadership that influences the organization's members (Bateman et al., 2017; Kouses & Posner, 2012; Templeton, 2017). Wiyono (2018) found that transformational leadership characteristics support school leaders' efforts to promote motivation, staff empowerment, and creativity. The research concluded that preparation programs should focus on transformational leadership to increase teachers' motivation and school improvement (Wiyono, 2018). Proper preparation of school leaders can help leaders feel more confident in leading inclusive and special education (Templeton, 2017).

Furthermore, leaders must be competent in the preventative measures or procedures students undergo before entering special education. Administrators must be prepared to understand and lead cultural diversity and use that lens to examine the content, instruction methods, and teaching material (Obiakor, 2006). Increasing school leaders' knowledge of the curriculum is essential, but in isolation is insufficient; what is required is school leaders' direct involvement with teachers in content areas (Stosich, Forman, Bocal, 2019).

Professional Development

Professional development, as defined by Chambers et al. (2008), is the "activities that help education professionals develop the skills and knowledge required to achieve their schools' education goals and meet the needs of the students" (Stosich et al., 2018, p. 868). Many school leaders did not receive adequate preparation for supervising special education programs; therefore, professional development is necessary for leaders to learn and build their leadership capacity. Boscardin et al. (2018) assert that standards and professional identities will not be

sufficient to lead; instead, leadership will be determined by how standards and identities translate into action. Wiyono's (2018) research produced a self-evaluation model to enhance transformational leadership and continuously improve leadership competence. Special education teacher attrition is problematic, and leaders must be prepared through structured professional development to support and enhance teachers' performance (Conley & You, 2017; Petersen, 2016). Principals may not understand the characteristics of effective professional development and its significant role in teaching practices and student learning (Koonce et al., 2019).

A study of aspiring leaders in their junior and senior year of college participated in a study investigating how students' constructive development is related to their leader identity development and understanding of leadership (Sessa, Ploskonka, Alvarez, et al., 2016). Results from this study found a relationship between leadership identity development and understanding of leadership, but no relationship was found between leadership identity and development and constructive development. Therefore, findings suggest that aspiring leaders continue to depend on others to help them construct reality requiring an intensive need for ongoing professional development as they grow within their profession. Principals need explicit professional development regarding strategies for increasing instructional growth in their schools by actively engaging in the professional development process (Koonce et al., 2019).

Mireles-Rios and Becchio (2018) concluded that administrators must know and understand the concept of teacher self-efficacy. Since the role of school leaders includes providing knowledgeable teacher evaluations, this process significantly impacts teachers and students. According to Koonce et al. (2019), social cognitive theory and efficacy play a role in the comfortability and involvement in planning professional development for teachers. Leaders can help facilitate collaboration by providing mentorship opportunities to develop skills, talents,

and abilities over time with adequate support (Kealy, 2010). Special education students, specifically low-incidence students, have increased access to the general curriculum. Petersen (2016) calls for professional development for administrators to understand how to support academic curriculum access and create formal structures that include inclusive education.

Summary

This study used Knowles's (2015) adult learning theory and the transformative learning framework of Mezirow (2000) to expand on general leadership and focus on inclusive and special education leadership. Knowles's (2015) and Mezirow's (2000) theoretical lens forms the study's foundation to learn from the experiences of school leaders during preparation programs and the shared experiences of transformative learning while leading inclusive and special education.

School leaders' roles and responsibilities have expanded from a positional role to an influential role of being instructional leaders for inclusive and special education programming (Connolly, James, & Fertig, 2019). The number of students with disabilities continues to increase over time; between 2011–2012 and 2018–2019, the number of students served under IDEA increased from 6.4 million to 7.1 million—an increase of 13% to 14% of total public school enrollment (U.S. Department of Education Office, 2020). The IDEA (2004) mandate requires that students receive FAPE; additionally, the *Andrew F.* case requires that IEP goals ensure students make increased progress and meet higher expectations. Inclusive education is expected to be accessible to protect all learners, especially students who receive a Section 504 plan under the American Disabilities Act (Taylor, 2011.)

School principals do not fully understand the vast responsibilities of creating an inclusive culture, and they report a lack of life experiences involving inclusive and special education

(Templeton, 2017). There is a lack of professional development for principals to lead inclusive education, and although they desire to learn how to successfully integrate this practice within their school buildings, they are not explicitly trained (Bai & Martin, 2015). In leading specially designed instruction (SDI), principals lack the skills to successfully implement SDI for students with severe disabilities (McLeskey, 2019). Although principals and school leaders have the role of being instructional leaders who plan and organize significant professional development for teachers, many of these school leaders lack the skills and require explicit professional development on instructional leadership (Stosich et al., 2018). Despite inadequate preparation, school leaders continue to be in leadership roles and complete daily operational or managerial tasks (Roberts & Guerra, 2017). Existing literature calls for more studies to extend beyond school leaders' experiences using general leadership competencies but to learn about specific preparation to build leadership capacity for leading inclusive and special education (Boscardin, 2020; Miller 2018; Strong, 2019; Templeton, 2017).

New mandates require leaders to be transformed and transform the school culture to meet expectations of effective inclusive and special education programming, including eligibility, leading IEP meetings, and providing useful feedback for teacher evaluations (Bateman et al., 2017; Billingsley et al., 2014). Standards exist in leadership preparation programs; however, special education standards are not regulated or consistent (Bateman et al., 2017; Strong, 2019; Thompson, 2017). Current literature calls for leaders to build their capacity and develop their leadership style to implement inclusive and special education with transformational leadership (Lentz, 2012). Furthermore, educational programs share a consistent outline of school leaders' standards, but educational leaders' programs do not include sufficient special education-related

coursework. The standards currently provided do not align with the advanced preparation standards outlined by the CEC.

This qualitative transcendental phenomenological study describes the essence of special education school leaders' shared experiences. This study adds to current research using the transformative lens to explore special education school leaders' perspectives, values, and experiences and how they can help or hinder learning and leading inclusive and special education programs. The transformative learning theory lens extends previous research studying public school leadership using adult learning theories. Special education leaders' collective journey to fulfill the roles and responsibilities of learning and leading inclusive and special education programming in Central Virginia will inform special education leadership practices. Their perspective on implementing inclusive and special education programming enlightens the process of transformative learning and leadership development through their background experiences, perils, and achievements. This provides practical implications for revising preparation programs, developing ongoing relevant experiential professional development, and ensuring that educational leaders are knowledgeable, competent, and confident to lead inclusive and special education efficiently.

CHAPTER 3: METHODS

Overview

Because school leaders are expected to be competent in specially designed instruction to meet students' needs and follow special education law, it is important to understand their preparation and leadership experiences (Esposito et al., 2019). The purpose of this transcendental phenomenological study was to explore the lived experiences of public school administrators who lead inclusive and special education programs in three districts in Central Virginia. This chapter details the research methods used in the study. As a qualitative, transcendental phenomenological study, it describes public school leaders' experiences in learning and leading inclusive and special education programming, compiles the participants' data, and describes the meaning of preparing special education leaders using the participants' lens. Data were collected through semi-structured interviews, participant journals, and surveys. The first part of this chapter describes why the study is qualitative, explaining the purpose of the qualitative phenomenological design and why it was the best approach. Next, it provides an overview of a transcendental phenomenology paradigm and captures the essence of human experiences with a fresh perception on the participants' experiences. The remaining sections review the study's design, including procedures used for participant selection, data collection, and data analysis. Then the chapter outlines the trustworthiness of qualitative research, including credibility, transferability, dependability, and confirmability. The chapter closes with a summary.

Design

This qualitative study followed Moustakas's transcendental phenomenological approach to understand the participants' lived experiences leading inclusive and special education programs in K–12 public schools. This qualitative approach offered an effective way to explore

the school leaders' perceptions of their university-based training, professional development opportunities, and experiences in leadership. I utilized the transcendental phenomenological approach to arrive at a new meaning of how school leaders' previous experiences impacted their daily leadership practices. As an instructional specialist who supports special education, I used epoché to refrain from previous judgments and acquired a new perspective (Moustakas, 1994). Using this qualitative design allowed me to "perceive everything freshly, as for the first time" and derive meaning from the lived experiences of how school leaders came to be prepared to lead inclusive and special education programs (Moustakas, 1994, p. 34). Unlike quantitative methods, the qualitative approach allowed me to interact with the data collection, analysis, and interpretation process (Creswell, 2015). The qualitative phenomenological design captured my intention to observe and describe the participants' lived experiences in contrast to a quantitative survey design, which would have focused on the numeric description of trends, attitudes, or opinions of a population (Creswell & Creswell, 2018).

As Moustakas (1994) described, a phenomenological design is a method to refrain from prejudgment to reach a transcendental state. I captured the reality of the participants from learning about the individuals' experiences and feelings related to learning and leading inclusive and special education programming. The transcendental phenomenology focused on descriptions of experiences (Moustakas, 1994). The study used Moustakas's (1994) research approach to gain insight into varying perspectives to achieve a "unified vision of the essences of the phenomenon" (p. 58). By using the transcendental phenomenology approach, I was able to separate out preconceived notions about the phenomena and discover new knowledge from the participants' experiences of leading inclusive and special education programs despite inadequate leadership preparation (DeMatthews et al., 2019; Leckie, 2016). The phenomenon explained in this study

used horizontalization, textural descriptions, and structural descriptions to analyze the data and arrive at the essence of school leaders' shared experiences leading inclusive and special education programs.

Based on the findings, the study presented the participants' perspectives of leadership and how the participants use their previous knowledge and experiences to navigate their daily operations in their own schools. The study revealed the commonalities that school leaders experience and revealed common values and beliefs. Overall, school leaders shared a common desire to have more knowledge because they lack the experiences of creating an inclusive school environment and ongoing professional development within in their respective roles (Templeton, 2017).

Research Questions

The central question is as follows:

How do school leaders describe their professional experiences in leading inclusive and special education programming?

The sub-questions are as follows:

SQ 1: How do school leaders who lead inclusive and special education describe their experience using special education knowledge to manage inclusive and special education programs?

SQ 2: How do school leaders describe their experiences of being instructional leaders of specially designed instruction?

SQ 3: How do school leaders describe their critical self-reflection experiences when making informed decisions to create inclusive and special environments?

Setting

The study was conducted in three school districts in Central Virginia. The school districts chosen all serve public school students with disabilities across a suburban, urban, and rural setting. Schools were chosen based on special education programming, inclusion services, and school leaders' willingness to participate in the study. The school districts have been provided pseudonyms to protect the districts' identity.

The first school district, ABC, is in the inner city. It is comprised of 25 elementary schools, including one charter school, seven middle schools, five comprehensive high schools, and three specialty schools. The U.S. Census reports the median household income from 2015–2019 as \$47,250; the poverty rate is 19.2%. The school district has 28,240 students enrolled, of whom 12.4% are students with disabilities. More than half of the students (51.9%) are economically disadvantaged. In the division, 2.7% of special education teachers are provisionally licensed compared to the 1.9% of special education teachers provisionally licensed across the state. Furthermore, 2.6% of teachers are provisionally licensed in high-poverty areas compared to the 2.3% provisionally licensed teachers across the state. This district reports 16.4% inexperienced teachers in all schools and a higher percentage of 16.9% in high-poverty schools, compared to statewide percentages of 6.2% inexperienced teachers in all schools and 8% inexperienced teachers in high-poverty schools.

The second district, XYZ, has a median household income is \$82,599, with the percentage of people in poverty at 6.6%. There are 63,000 students enrolled, and 39.8% of the students are economically disadvantaged. Of these, 12.7% are students with disabilities. In this district, there are 64 schools, including 39 elementary schools (grades K–5), 12 middle schools (grades 6–8), 11 high schools (grades 9–12) in addition to 13 specialty centers and two career and technical centers. There are 4,300 teachers employed with 1.9% of those teachers

provisionally licensed to teach special education, 3% provisionally licensed to teach in high-poverty schools, and 1.7% provisionally licensed to teach in low-poverty schools. Across the division, 9% of teachers are inexperienced, and in high-poverty schools, 15.9% of teachers are inexperienced, and 6.6% are inexperienced in low-poverty schools. The percentages of inexperienced teachers are higher than the state; statewide there are 4.7% inexperienced teachers, 8% inexperienced teachers in high-poverty areas, and 4.8% inexperienced teachers in low-poverty areas. Staffing varies based on student enrollment; therefore, each school has one principal but may have one or more assistant principals based on student enrollment.

The third school district, EFG, has a total enrollment of 2,784 students, with 17.2% of those students receiving special education services. The median household income is \$54,500, and 39.1% of the students are economically disadvantaged. The division reports 2.4% of the teachers are inexperienced, which is less than the state's reported 4.7% inexperienced teachers. This district has three elementary schools, one middle school, and one high school. Because of the smaller size of this school district, there is typically one principal per school; based on enrollment, however, a school may have both a principal and an assistant principal.

The school districts were chosen based on the different poverty rates, percentage of inexperienced provisionally licensed special education teachers, and percentage of special education students. Each school district provides public education to students that met at least one of the 13 categories under the IDEA. The significance of using a variety of factors provided an opportunity to consider leadership across multiple populations.

Participants

The sample population consisted of 10 participants who met the criteria of being school building level leaders with K–12 endorsement in administration and supervision. The selected

participants were recruited because of their experience with the phenomenon and their willingness to commit to the study (Moustakas, 1994). Bowen (2008) found that 10 to 12 participants are sufficient to reach saturation and develop a thematic analysis.

The criteria for selecting participants were based on their professional position to provide building-leveled leadership of inclusive and special programs. I recruited a diverse group of school leaders of varying age and experience. I used criterion sampling to intentionally sample a group of individuals in the target population who met the qualifications and could best inform me about the research problem. The criterion sampling qualitative study methodology is more effective than random sampling because criterion sampling allows a better understanding of the participants and identifies the targeted needs of the criterion sample (Creswell & Poth, 2018). I used the qualifying criteria that each participant must hold a valid teaching license and an administration and supervision K–12 license.

The study's central purpose was to understand how licensed school leaders perceive their experiences in leading inclusive and special education programs in the K–12 public education setting and how it contributes to the academic achievement of students with disabilities. Creswell (2015) stated that criterion sampling supports the study's central purpose because it provides quality assurance research specific to qualified school leaders. The selection process is outlined in the next section.

Procedures

The procedures section forms the systematic methods of a qualitative study (Moustakas, 1994). This study utilized a transcendental phenomenological design. Before starting data collection, I began the process of obtaining site approval from various school districts in Central Virginia. Next, I received approval from the Institutional Review Board (IRB) (Appendix A).

After receiving approval, I conducted a pilot study for the individual interview questions, participant journals, and focus group questions. The purpose of the pilot study was to practice interview skills, analyze interview questions, and trial the data collection tools (Creswell & Poth, 2018). Based on the pilot study, I learned where some participants might need clarification or examples and made a note of how to support responses. I interviewed two school leaders who were not involved in the study to explore the procedures outlined in the study. I checked the wording of each question to determine if it would reveal information about the phenomenon. There were no needed changes to the interview questions.

After completing the pilot study and receiving site approval from the two remaining districts, I identified school leaders from the three school districts on the elementary, middle, and high school levels. School leaders' contact information was located on the email directory on school district websites. Next, I emailed a recruitment letter containing a link to the online screening tool and identified leaders who were responsible for leading inclusive and special education programs who met the following criteria: (a) school leaders with a Virginia teaching license; (b) school leaders with a Virginia K–12 supervision and administration endorsement; (c) or school leaders with a K–12 special education teaching endorsement or license (Appendix B).

Selected participants received a consent form (Appendix C). After I received the signed consent form for participation, I assigned pseudonyms and emailed participants the dates to schedule an interview. Before the interviews, participants received a copy of their consent forms, interview questions, and participant journals. I collected data through semi-structured interviews, participant journals, and focus group interviews. The individual interviews were conducted via Google Meet and transcribed using the transcription software Otter; the focus group was conducted using Zoom and was also recorded and transcribed using Otter. All transcriptions

were uploaded into NVivo along with the participant journal entries. Afterward, I listened to the interviews and watched the video to check for any errors and to observe the gestures and tone in the participants' responses. Any corrections needed to the manuscript were made manually to the printed document. After the interviews the participants received an email of their transcriptions for member checking and to audit their responses to ensure accuracy. The phenomenological process was utilized to analyze data using the modified seven-step van Kaam and thematic analysis (Moustakas, 1994). Trustworthiness was ensured through security of data by using a protected password for access to the data and member-checking (Creswell & Poth, 2018)

The Researcher's Role

The researcher's primary role in a phenomenology study is to serve as the tool for data collection (Creswell, 2007). I served as the human instrument in the study and practiced epoché by documenting any personal biases from my experiences as a special educator (Appendix D). I remained ethical throughout the process and ensured the comfortability of the participants and maintained confidentiality. Participants were not required to keep their cameras on during any of the interviews and were given the option of changing their names for the focus group session using that feature on Zoom.

My biases in the study were from my experiences teaching special education and receiving limited specialized instructional and collaborative teaching support from public school leaders. Previously as a teacher, I earned a master's in teaching special education K–12. I was invested in teaching special education, but often had little to no support and served as an advocate for the students to have access to an inclusive education. Therefore, I practiced epoché by maintaining a reflective journal (Appendix D) to recognize my preconceived biases (Moustakas, 1994). In my reflective journal, I responded to the same interview questions as the

selected participants (Appendix D) to further bracket my experiences (Creswell & Poth, 2018). The memoing process was completed during the research study to review my perceptions to filter biases and capture the participants' experiences accurately (Appendix E). The data collected from the memoing was later used in the phenomenological reduction process.

During the interviews, I allowed active participation, and participants were able to share any information relevant to the study that they wanted. As I listened, I made sure that I focused on their experiences and their perception of leadership. Because of my previous experiences as a special education teacher, I had to refrain from providing any input or feedback so that the participants would feel comfortable sharing information. The study revealed that participants have shared experiences related to different districts, grade levels, and demographics. During the research process, I adhered to the policies outlined in the IRB and maintained the participants' confidentiality.

Data Collection

To understand special education leaders' experiences, I utilized a transcendental phenomenological investigation using the semi-structured interview method. Moustakas (1994) explained that interviews are a method that engages participants and is used to collect data on the topic and question. The transcendental phenomenology study uses research questions to guide the study to uncover the qualitative factors in behaviors and experiences (Moustakas, 1994). I interviewed the participants to capture their experiences as they have experienced them (Bentz & Shapiro, 1998). Initially, I used the interactive process of an open-ended dialog to create a relaxed social environment for the participants (Moustakas, 1994). This method was useful later in the interview process for engaging and getting a deeper understanding of the participants' experiences and increased their willingness to describe their experiences in a comfortable and

secure environment (Moustakas, 1994). Creswell and Poth (2018) emphasize utilizing triangulation; therefore, interviews, focus groups, and participant journals were selected. These qualitative methods offered reliability and validity as I arrived at the essence of the participants' experiences.

Interviews

The interviewer and interviewees participated in the semi-structured interviewing process to gain more in-depth responses. Before beginning the semi-structured interviewing process, I completed a pilot study to determine whether the study had weaknesses and to test the appropriateness of the data collection (Hassan et al., 2006). I tested the interview questions and focus group questions with two special education leaders to ensure the credibility of the study. The special education leaders in the pilot study met the criteria of the final study by holding a valid teaching license and an administration and supervision K–12 license. The data collected and the two participants in the pilot study were not used in the final study, and no changes were made to the interview questions.

After the pilot study, I began the interview process. All interviews were recorded and transcribed. Afterward, I sent the transcript to each participant for review (member-checking). The interviews used open-ended questions to allow participants to fully describe experiences in an informal and interactive manner (Moustakas, 1994). The interview protocol adhered to epoché to avoid biases and accurately capture the participants' experiences (Moustakas, 1994). If I felt a personal bias while listening to what the participant shared, I would write it down to keep that thought from interfering with the data analysis process. The interview protocol consisted of open-ended questions (Appendix H). The interviews occurred in a secluded setting, conducive to audiotaping (Creswell & Poth, 2018). All interviews were transcribed using Otter. The individual

interviews were recorded using Google Meet and the focus group interview was recorded using Zoom. After the interviews, I shared the transcription with the participants for member-checking and to ensure that I captured what they meant.

An advantage of using interviews was that the participants responded to open-ended questions and shared experiences related to learning and leading inclusive and special education. At the beginning of each interview, I reviewed the study's purpose, the amount of time needed to complete the interview, the participant's right to withdraw from the study, and plans for using the interview data (Creswell & Poth, 2018). The following interview questions were used as part of the participant data collection.

Standardized Open-Ended Interview Questions

1. Tell me about your experiences in education before becoming an inclusive and special education school leader.
2. What motivated you to become a leader of inclusive and special education?
3. How did your previous experiences inform your role of leading inclusive and special education?
4. Describe how you prioritize your learning as it relates to leadership, special education, and inclusive education programs.
5. Based on your experiences, what would you have liked to know more about regarding leading inclusive and special education?
6. Describe your experiences in your current role of participating in professional learning opportunities.
7. Describe your role in leading inclusive and special education in your building.
8. What motivates you to learn more about inclusive and special education?

9. How do you share your vision for inclusive and special education to influence the staff's holistic approach to inclusive and special education?
10. How do you feel about your ability to support collaborative instruction between special education and collaborative teachers?
11. How do you know whether you are meeting student and staff needs when leading inclusive and special programs?
12. How do you describe your values and beliefs about leading inclusive and special education?
13. How do you describe your professional critical self-reflection process?
14. What questions, if any, came up for you as you further developed your leadership style?
15. Tell me about the challenges that you have experienced in implementing inclusive and special education in your building.
16. What satisfaction have you gained regarding inclusive and special education?
17. Describe how you solve problems related to frustrations related to leading inclusive and special education programs.
18. Describe how you handle moral and ethical norm challenges during IEP team meetings.
19. What is the best practice for school leaders to know about leading inclusive and special education?
20. What, if anything, do you wish had been included in your leadership program or professional development opportunities regarding inclusive and special education?
21. What else would you like to share?

Question 1 prepared the participant for social interaction (Rubin & Rubin 2012).

Moustakas (1994) asserts that participants should feel comfortable and be a part of the research

process. The interview questions built a rapport with the interviewee and gathered information to explicate the research question (Creswell & Poth, 2018). According to Daniels et al. (2019), many school leaders who lead inclusive and special education do not have special education background experience.

Questions 2–8 used Knowles’s (2015) six adult learning assumptions to analyze how participants described their motivation or need to learn. The questions supported Knowles’s andragogical theory (2015) by eliciting how the participants utilize background experiences. The questions explored how these school leaders identify need-to-know information to make professional decisions related to leading inclusive and special education. Furthermore, the questions generated data related to Sub-questions 1 and 2 by having participants describe their experiences using knowledge and managing programs and implementing specially designed instruction. The questions were semi-structured, and participants were able to ask follow-up questions and provide clarifying information. Questions 9–18 are related to Mezirow’s (1991) transformative learning theory. Sub-question 3 focused on critical self-reflection experiences in decision making. These questions helped inform me of the participants’ individual experiences. The decision to use transformative learning theory was based on its description of learning and experiencing individual change that leads to collective change. I used these questions to understand how school leaders transform their knowledge to establish more inclusive perspectives and mindsets. Mezirow (1991) describes meaning perspectives as schemes, including attitudes, beliefs, and values. A distinct advantage of using a transformative lens is that it causes adults to reflect on previous assumptions through critical self-reflection (Mezirow, 1991). Questions 19–21 were designed to learn about the participants’ most significant experiences in leading inclusive and special education. The framework of these questions is

consistent with Brinkmann and Kvale's (2015) assertion that the purpose of interviewing is to construct knowledge between the interviewer and the interviewee. The questions revealed participants' experiences in understanding their role in leading inclusive and special education.

Participant Journals

Bentz and Shapiro (1998) assert that phenomenology research aims to describe human experiences as the person experiences them. Personal journals were chosen as a data collection tool to gain a detailed understanding of the participants' point of view. Reviewing participant journals allowed me to obtain further in-depth information about the participants' experiences (Kyale, 1996). Before participating in the interview process, the participants received an electronic journal with guiding prompts and had one week to complete the electronic journal (Appendix F). The purpose of the journaling process was to gain a deeper understanding of their perspective and experiences. All participants were responsible for documenting their thoughts, including three to five experiences in a paragraph format, each involving an area that positively or negatively affected their daily practice of leading inclusive and special education programs. A key advantage of participants' using the participant journal was to provide a time for critical self-reflection of their professional practice. The guiding prompts obtained meaning and depth from participants' experiences (Moustakas, 1994). I explained to the participants that the guiding prompts were a guide. They were permitted to add any pertinent information related to their experiences of leading and implementing inclusive and special education. Participants were advised to journal a minimum of one paragraph and a maximum of five paragraphs. To assist the participants, I sent an email to serve as a reminder of the journaling process (Appendix G). The guiding prompts are as follows:

- How did your prior experiences assist you in organizing your workday?

- Reflect on any moral or ethical norms that were involved in leading inclusive and special education programs.
- What opportunities did you have this week to problem solve using a new way of thinking?
- How did you maximize collaborative opportunities?
- What other thoughts do you have regarding your leadership of inclusive and special education programs?

These guiding prompts are based on Mezirow's (2000, 2012) transformative learning theory and Knowles's (2015) theory of adult learning theory. The first prompt focuses on Knowles's principle (2015) of organizing knowledge and using obtained knowledge for memory retention and retrieval. The guiding questions allowed me to understand better how the school leaders use previously attained knowledge to organize and implement leading inclusive and special education programs throughout their workday. The following three prompts focus on Mezirow's (2000) transformative learning, explicitly focusing on moral and ethical norms and applying the concept of a "disorienting dilemma," which requires a person to act differently. The last guiding prompt allows the participant to reflect and add any relevant information pertinent to their leadership practices while leading inclusive and special education programs.

Focus Group

The third data collection method was a focus group because it provided a deeper into understanding the shared experiences of the group (Appendix I). The participants shared common educational backgrounds and held school leadership positions justifying the use of a focus group since it provides a strategic discussion of experiences (Creswell & Poth, 2018). The focus group consisted of six participants with a range of up to five years of leadership

experience; each participant had a minimum of 10 years of experience in education in roles outside of leadership.

The participants attended the focus group virtually using the Zoom platform to increase confidentiality. Participants were encouraged to share (i.e., to unmute their mics or raise a hand virtually to share their responses). The focus group was recorded, and the data were transcribed. Each participant received a copy of the transcription, which was cross-referenced. The focus group enriched the study and allowed the school leaders to discuss collective shared experiences. I facilitated the conversation and ensured that everyone was able to share.

Standardized Open-Ended Focus Group Questions

1. Please introduce yourself to the group by describing your Virginia licensure and endorsements, higher education degrees, job title, and the number of years that you have been a leader of inclusive and special education programs.
2. What prior experience has been the most useful to you in your role of leading inclusive and special education programs?
3. What do you wish you had known more about before assuming your current role of leading inclusive and special education programs?
4. What recommendations do you have for professional learning opportunities for leading inclusive and special education programs?
5. Describe how your leadership style has made a difference in your school building.
6. How do you approach moral and ethical norm challenges relative to inclusive and special education programs?
7. How are you supported when navigating differences between moral and ethical norm challenges at work?

8. Describe how you know when you need an additional level of support and explain your support options.
9. Describe the most important requirement that should be included in administrator preparation programs relative to leading inclusive and special education programs.
10. What else would like to share with the group?

These semi-structured questions allowed for the participants to ask follow-up questions and provide clarification. Question 1 served as an introductory question to support the participants' comfortability (Creswell & Poth, 2018). Questions 2–4 are based on Knowles's (2015) adult learning theory. Research Sub-questions 1 and 2 focus on how participants describe their leadership and ability to specialize in providing specialized instructional support. The shared experiences of the group were used to analyze the participants' approach to understanding their experiences of leading inclusive and special education programs. Questions 5–8 focused on the transformative learning process described by Mezirow (1991, 2000) because beliefs and opinions that guide practices are heavily influenced by values and standards. Research Sub-question 3 relates to school leaders' decision-making process and critical self-reflection. I used these focus group questions to learn how the participants change their frames of references throughout the leadership process relative to the values and beliefs of leading inclusive and special education programs. Questions 9–10 were designed to enrich the connection between the interviewer, interviewee, and the content (Seidman, 2019). The focus group questions served as one data point in the triangulation process.

Data Analysis

For this transcendental phenomenological study, data were collected using a systematic approach to capture the essence and meaning of participants' experiences (Moustakas, 1994). A

transcendental phenomenology analysis has four central themes including epoché, phenomenological reduction, imaginative variation, and meaning synthesis (Moustakas, 1994). I transcribed the data from the interview and focus group and allowed the participants to read the transcriptions before the analysis to ensure accuracy and avoid errors that could impact the study's integrity (Mero-Jaffe, 2011). I utilized NVivo a software program that helps analyze, manage, and shape qualitative data during the analysis process (Creswell & Poth, 2018).

Epoché

Epoché was applied to set aside prejudgments so I could conduct unbiased interviews (Moustakas, 1994). The bracketing process was engaged during the interviewing process to reduce any effect from my previous experiences and biases (Creswell & Poth, 2018). To implement the epoché process, I maintained a reflective journal to bracket my experiences with the phenomenon (Appendix D). The journal was analyzed to identify any prejudices that I might have had during the study.

Phenomenological Reduction

Phenomenological reduction focuses on the qualities of participants' experiences and is described in textural language (Moustakas, 1994). In this transcendental phenomenology study, horizontalization was used to identify significant themes from the data that described how participants experienced the phenomena of learning and leading inclusive and special education (Moustakas, 1994).

To complete horizontalization, I uploaded all the data into NVivo and had paper copies to become more familiar with the data (Creswell & Poth, 2018). Using NVivo, I carefully listened to the interview recording and reviewed the physical copies of the transcripts and participant journals. I coded each participant's responses separately to maintain the uniqueness of each

participant's experience (Moustakas, 1994). Next, I began to code the responses from participant journal entries and the focus group session. I assigned equal importance to all statements and coded data by common concepts. The participants' similar significant statements and quotes about their shared experiences were clustered into themes to create textural descriptions (Creswell & Poth, 2018; Moustakas, 1994). The textural description informed me of what the participants experienced (Moustakas, 1994).

Imaginative Variation

The imaginative variation helped me understand how the phenomena' of school leaders experience occurs within their role (Moustakas, 1994). The textural description focused on the participants' shared experiences to convey their overall essence (Creswell & Poth, 2018). A summary of each interview was provided to better understand the participants' experiences and to help with the validation of the themes. The textural description explains what was experienced, and the imaginative variation provides a deeper understanding of how the phenomena were experienced (Moustakas, 1994).

The primary themes emerged from the interpretations of the textural descriptions and the imaginative variation (Moustakas, 1994). The imaginative variation deduced the structural essence of the experiences (Moustakas, 1994). Imaginative variation was provided as a structural description to determine how school leaders felt about leading. After reviewing participant responses and coding, I analyzed the transcripts to determine if the theme aligned with the transcript, and if it did not, I removed the theme in the interest of lean coding, which reduces the number of categories to no more than the recommended five or six themes (Creswell & Poth, 2018).

Meaning Synthesis

The textural-structural descriptions formed the essence of participants' experience. During the process, I was reflective as I observed themes emerge by coding individual statements (Moustakas, 1994). A textural-structural description was generated for each participant and established a universal description or essence of the group experience (Moustakas, 1994). The textural-structural description was revealed for each participant after using the validated themes that emerged in NVivo after the horizontalization process. The structural description served as a follow-up to the textural description to note the leaders' experiences. This process was completed for each interview to reach saturation. The NVivo software program was used in addition to my handwritten notes to review each component, including individual themes, textural descriptions, and structural descriptions (Creswell & Poth, 2018). I catalogued codes to redefine thoughts and draw connections between themes and patterns to arrive at each phenomenon's synthesized description (Moustakas, 1994).

Trustworthiness

Trustworthiness refers to the degree of confidence in the data, interpretation, and methods used to ensure the quality of a study (Pilot & Beck, 2014). The most used criteria for trustworthiness are credibility, dependability, confirmability, and transferability (Korstjens & Moser, 2018). I applied trustworthiness by listening carefully to the participants as they responded to open-ended questions; as noted by Seidman (2019), the researcher should demonstrate listening skills and refrain from over-sharing and talking. The open-ended questions allowed me to gain a deeper understanding of the participant, but as the researcher I stayed focused on the purpose of the interviews. Instead of using leading questions, I clarified by asking follow-up questions. Each participant had the opportunity to complete member-checking to ensure that his or her intent was properly captured (Creswell & Poth, 2018). I used three data

points to triangulate data to validate the data collection methods and theoretical framework (Patton, 2015).

Credibility

Credibility requires the study to be accurate and ensures that researchers follow the validation procedures so that the information collected is credible (Creswell & Poth, 2018). Subjective experiences, biases, or preconceived notions can threaten the credibility of the research (Creswell & Poth, 2018; Moustakas, 1994). Throughout the study, I was mindful of biases to fully capture the meaning of the participants' experiences (Moustakas, 1994). I kept my own handwritten notes after each interview to accurately reflect any biases or perceptions I had after the interview. I maintained a reflective journal to assist and support the study's accuracy (Creswell & Poth, 2018). Triangulation supported the credibility of the study and revealed the themes using the multiple data sources, including interviews, participant journals, and focus groups (Creswell & Poth, 2018).

Dependability & Confirmability

Dependability is the stability of findings over time (Korstjens & Moser, 2018). The study's dependability will enhance my credibility using an audit trail outlining the process of research. The audit trail was used to increase transparency within the study (Creswell & Poth, 2018) and to help reduce bias (Appendix J). Biases are shared through reflective journaling, which provided an honest evaluation of the study (Creswell & Poth, 2018). Confirmability is the degree to which the findings of the research study can be confirmed by other researchers (Korstjens & Moser, 2018). Member-checking was used during the interview process to allow the participants an opportunity to review their transcripts to improve accuracy (Creswell & Poth, 2018).

Transferability

Transferability is the research's capability to be transferred to other contexts or settings (Korstjens & Moser, 2018). I provided a full description of the smaller number of participants to gather a thick and rich understanding of participants' experiences (Creswell & Poth, 2018). The participants' descriptions and the research process will allow readers to determine the transferability to their own settings or contexts (Korstjens & Moser, 2018). There are limitations to the study's transferability because of the sample size and the participants' backgrounds.

Ethical Considerations

Ethical considerations were followed to protect the participants by meeting IRB requirements before collecting data. Participants received a consent form that explained the specific details, nature, purpose, and research study requirements (Moustakas, 1994). After receiving the consent forms, they were assigned pseudonyms to protect their identity, and confidentiality was maintained.

Member-checking after the interview allowed the participants to review their responses and contribute to the interview process (Moustakas, 1994). Electronic data was stored using NVivo software, which is safe and secures all data. Physical documents were safeguarded and locked in a lockbox. In compliance with the Federalwide Assurance Code, data from this study will be kept for three years, after which all data from the study will be destroyed (45 CFR 46.117).

Summary

The purpose of this transcendental phenomenological study was to learn about the essence and meaning of school leaders' shared experiences leading inclusive and special education programs in three school districts in Central Virginia. A qualitative approach was appropriate for

this study as the participants provided in-depth experiences that supported the research question. Moustakas's (1994) systematic approach to phenomenology was utilized, and three data points (interviews, participant journals, and focus groups) were analyzed. (Creswell & Poth, 2018). The data from the interviews, participant journals, and focus group were triangulated and revealed the most significant participant experiences (Patton, 2015). This chapter established the study's trustworthiness and defined credibility, dependability, confirmability, and transferability (Korstjens & Moser, 2018). Additionally, ethical considerations were described and adhered to by using Moustakas's (1994) systematic approach.

CHAPTER 4: FINDINGS

Overview

The purpose of this transcendental phenomenology study was to explore the lived experiences of public school administrators who lead inclusive and special education programs in Central Virginia. This chapter provides an in-depth understanding of school leaders' experiences in leading inclusive and special education programs. The participants' experiences provide an informed perspective on the daily roles of leadership. This chapter presents the key findings obtained from in-depth semi-structured interviews, participant journals, and a focus group. The key findings were analyzed to answer the following central research questions and sub-questions:

Central Question: How do school leaders describe their professional experiences in leading inclusive and special education programming?

Sub-Question 1: How do school leaders who lead inclusive and special education describe their experience using special education knowledge to manage inclusive and special education programs?

Sub-Question 2: How do school leaders describe their experiences of being instructional leaders of specially designed instruction?

Sub-Question 3: How do school leaders describe their critical self-reflection experiences when making informed decisions to create inclusive and special environments?

This chapter includes the participant descriptions as well as a narrative of themes addressing the research questions and sub-questions.

Participants

The study included 10 participants who serve as school leaders in three districts in Central Virginia. The school leader participants in the study included five females and five males, with seven identifying as African American, one as Asian American, and two as Caucasian. At the time of the study, the participants served in the following positions: principal, assistant principal, instructional compliance coordinator, and coordinator of special education. Each participant has an endorsement for administration and supervision K–12. The years of experience in their respective roles of leading inclusive and special education range between one and eight years. However, each participant has a background in teaching and has been in education in various roles for a minimum of 10 years.

Participants in this study were identified by using culturally appropriate pseudonyms in accordance with Liberty University's Institutional Review Board (IRB) guidelines and by not compromising anonymity. The pseudonyms were established when the participants provided consent. The table below lists each participant's number of years in leadership and education, highest degree earned, content area specialization, and grade level taught.

Table 1*School Leader Participant List*

School Leader	Years in Leadership	Years in Education	Highest Degree Earned	Content Area	Grade Level
Amanda	5	24	Masters	Special Education K-12	K-12 th
Ashley	3	14	Education Specialist	Early Childhood	K-5 th
Cameron	2	16	Masters	Educational Leadership & Special Education	6 th -8 th
Corey	2	11	Masters	Educational Leadership/Special Education K-12	6 th -8 th
Daniel	8	12	Masters	Special Education K-12 & Educational Leadership	9 th -12 th
Kary	2	13	Masters	Elementary Education	K-5 th
Nyla	2	14	Masters	English & Educational Leadership	K-5 th
Phillip	6	10	Doctorate	Educational Leadership/History	K-5 th
Raphael	3	10	Masters	History & Educational Leadership	9 th -12 th
Tiffany	3	15	Masters	Special Education K-12 & Educational Leadership	6 th -8 th

Amanda

Amanda has been working in education for 24 years, having begun her career as an elementary special education teacher in a self-contained setting working with students who were developmentally delayed. She has experience teaching both elementary and middle school, with her latest position being the instructional compliance coordinator for her school, serving students K-5. During her early years of teaching, she was a part-time GED instructor for seven years. In

that role, she became passionate about family literacy programs as she learned how important it is for learners to be exposed to different facets of life. Amanda spent her time in education in an urban setting in Central Virginia. Amanda considers herself an advocate for students and does not feel that many students need to spend their full day in the self-contained environment. She has a strong desire for inclusive education and believes that all learners can learn.

In her current role as an instructional compliance coordinator, Amanda is the administrative team member responsible for ensuring compliance and attending all IEPs and eligibilities. She provides professional development to the case manager and her special education teachers and constantly communicates with staff about student progress and needs. Her ability to model to her team demonstrates confidence and supports consistency among staff when implementing inclusive instructional practices. Encouraging case managers and teachers to establish a strong rapport with parents is a strength for Amanda because she believes that knowing all the families is helpful during any special education process. Her leadership style is based on having strong communication. As a leader, she believes that every child can learn, and she shares that belief with her colleagues in her daily interactions. She finds that fostering teamwork and building a sense of community are among her strengths and are essential when leading inclusive and special education programs.

Ashley

Ashley began her career in education as an early childhood special education teacher and spent 14 years in the classroom before becoming a coordinator of special education. She worked in both rural and suburban settings in Central Virginia. During her last teaching position, she served as the team lead. When a position in special education administration became available,

her principal approached her to move into the role of leading special and inclusive education in her building, serving the K–5 population.

At the time of the study, Ashley was in her second year as the coordinator of special education for her school. She describes her primary role as ensuring compliance for IEPs and 504s and serving as the local educational agency (LEA). As the LEA, she makes the final decision if a team cannot reach a consensus, reviews the progress notes, conducts observations, and helps staff improve in areas such as data collection to ensure that students receive services. Her motivation to continue in this role is to help students progress and to provide students with inclusive activities to succeed with their peers. She shares her vision with the inclusive and special education staff during their monthly meetings, communicating the purpose of the programs and making sure that staff members are aware of the common goal. According to Ashley, her strength is communication. Since she was familiar with the team before taking this leadership role, she makes sure that she is visible in the building and in the classrooms to ensure that the staff knows that she is authentic and willing to model and support in the classroom. Communication and a student focus describe Ashley's leadership characteristics.

Cameron

Cameron began his career as a tutor in an urban district, where he has continued his tenure, later becoming a special education administrator in different schools across the district. Cameron has 16 years of experience in education. Before becoming a leader in the district, he transitioned from a tutor to a special education teacher with an educational background in fine arts. He became a provisional special education teacher based on his relationship with the district. He describes his experiences of receiving a provisional license as taking one class and not knowing much about special education when he started teaching. He described his first year

of teaching as doing what he thought students needed based on how he learned and described his first-year framework as a huge misconception about teaching special education.

Cameron's motivation to lead was based on the recommendations of his colleagues who saw his work ethic. He reflected on his feelings of being resistant to the leadership role at first, but he learned that he had an innate desire to help others. After serving as a special education teacher in a middle school setting, he became an instructional compliance coordinator and later coached new teachers in becoming certified special education teachers. He would describe gaining most of his leadership experience during his coaching role.

Cameron is currently responsible for leading the special education and inclusive education programs in an urban setting and has had this position for two years. Cameron believes that conversations are a way that he can help staff to have a mindset shift. He found that this mindset shift is imperative for students to have the opportunity to gain access to grade-level content. By participating in these conversations, he found he could increase buy-in from staff in communicating his vision and belief that all students can be successful when provided with the appropriate teaching strategies.

As a leader, he describes himself as always having high expectations for students, which means that all students will have access to age-appropriate grade-level content. One of the challenges that he has faced when leading special education and inclusive education programs is battling misconceptions about students with disabilities. However, he found that helping teachers manage behaviors is difficult because the behaviors lead to decisions that move away from focusing on what's best for the student but appeasing the staff to increase teacher retention. As a result, students with disabilities often get secluded from their peers instead of teachers examining

their classroom management to see if another approach is available that can lead to success for the student.

Corey

Corey did not begin as an education major. In undergraduate school, he studied marketing but entered education because of a desire to coach football. During that time, he had to be employed to be a football coach at the school. This prompted him to return to school, where he worked as a teacher while receiving his provisional license in special education. As a first-year teacher pursuing a provisional license at the high school level in the self-contained math and English setting, he faced several challenges. He described it as a “learning curve” because he took one class while simultaneously working with students in school. Although balancing between learning the content and practicing teaching he felt had an advantage because he could apply what he was learning in his program directly in the classroom. His first leadership position came after four years of teaching. He became the department chair and had great mentorship and administrative support. As he continued his education journey, he found that people learned best by doing. While serving as the department chair, he branched out from the self-contained setting and gained an enriched experience co-teaching with general education teachers.

As a case manager, he became more confident and felt that he had developed enough information and wanted to share what he learned on a larger scale. Reflecting on his growth as a special educator motivated him to move into an administrative position where he currently serves as a middle school assistant principal. He has been in the assistant principal role for one year and supports several departments, including the math department, fine arts, world languages, and special education. As the administrator, he attends all IEP meetings and any other meetings related to special education, such as eligibility and child study. He provides support to the team

but has a special education coordinator who helps him manage compliance. As the assistant principal, he must also ensure that all processes are monitored appropriately, especially regarding instructional compliance and students being in their least restrictive environment. Furthermore, he is the point of contact when managing disputes among parents, case managers, general education teachers, coordinators, and other team members. Although he handles the logistics of the building, he describes himself as the instructional leader for special education and the leader of inclusion; he ensures that students get quality time in the general education setting and that the instruction aligns with the standards.

Corey shares his visions through interactions, specifically during family meetings and department meetings. He also uses the meetings to ensure that all staff members have the information they need to be successful in the upcoming initiatives or daily tasks that happen throughout their day. During his observations, he intentionally helps teachers with instructional strategies that they can use to support their instruction. When he models such strategies or debriefs the staff after observations, he uses those interactions to communicate his vision.

Daniel

Daniel has been an educator for 12 years and has held various roles as a special education teacher, program coordinator, assistant principal, and central office administrator. Before becoming an assistant principal, he worked as a special education teacher in a self-contained setting. As a program coordinator for special education, he helped students transition from high school into the community. He worked in both suburban and urban settings serving high school students. He was an assistant principal for eight years, and during this time, he served as the leader of the inclusive and special education program. He described his motivation for leading inclusive and special education as inherited from the duties of his role. Still, he learned to enjoy

it because he realized how important it was for the students to be included in the school culture. When he was asked about how his previous experiences informed his role in leading inclusive and special education, he described how his leadership program gave him his foundation and his practical mindset of recognizing that real life is not a self-contained versus general education situation but an inclusive world where students should be included with everybody else in society if they are going to be able to be successful.

Daniel wants to make sure that all teachers, compliance coordinators, and school leaders know the best practices, current trends, and how to put those strategies into practice. Based on his experiences as a special education teacher and an administrator, he feels confident in working with collaborative teachers to help enforce instructional strategies and considers himself a hands-on leader. Based on his responses, Daniel's values as a leader align with being a caring person who is in it for the right reason and who advocates for students by ensuring they have the appropriate access to achieve success.

Kary

Kary has worked in the urban setting as a classroom teacher for 11 years. During that time, she was the general education teacher in a collaborative environment. She transitioned from the dean position to the assistant principalship role. Her experience as a co-teacher has always been positive, and she worked well with the special education teachers. The bulk of her experiences working with special education comes from her collaboration with her special education teachers. She has always been inspired to be a leader but never specifically pursued leading special education. In her building, she has a special education coordinator who helps to support the assistant principal and the school to ensure compliance and adherence to special education processes. However, as the assistant principal, she is held accountable for all learners'

success and the progress of special and inclusive education programs. Kary shared that outside of working with special education teachers, she does not have additional training in leading inclusive and special education but has sought such opportunities. Still, they ended up not providing her with what she needed.

Kary considers herself a flexible leader because she is aware that there are frequent new initiatives and new expectations in her urban district. Therefore, she strives to make sure that she is flexible with her style to meet the needs of her family, staff, and the community. So, she does not commit to one leadership style because she focuses on adjusting to meet the immediate needs of those that she serves. As a leader, her most significant area of satisfaction is reviewing students' data, seeing their growth, and hearing positive feedback from the parents.

Nyla

Before becoming a school leader, Nyla taught for 12 years in middle school. She spent the first eight years primarily teaching sixth and seventh grade reading and reading intervention classes. She focused on Tier 2 and Tier 3 interventions with groups no larger than 15 students. After her eighth year, she began to teach eighth-grade English, which encompassed reading and writing literacy. This is where she received most of her experience in teaching collaborative classes. As a collaborative teacher, she was exposed to different professional development opportunities and worked with her special education teacher to get inclusive teacher training. This helped create a system and instructional models available during the co-teaching models. Her motivation to become a leader emerged as she began to take on more responsibilities in her building. Because of her experiences, she became a mentor to new teachers and provided additional support. In 2018, Nyla was awarded teacher of the year in her suburban district, and she felt that this motivated her and her leadership team, encouraging her to pursue leading a

school building. Nyla received an administration endorsement to her master's degree. As she reflected on her experiences in attaining this endorsement, she noted that she did not receive explicit instruction on how to lead inclusive and special education programs. However, she did participate in a school law class but feels that it did not prepare her for her current role because it did not provide any practical information. Her on-the-job experience has been where she has done most of her learning.

Nyla says that in her role as the special education supervisor she relies heavily on the special education coordinator to help with compliance. She checks in regularly with the special education coordinator to review case laws, eligibilities, and student data and to discuss instruction. Nyla describes her leadership style as a relationship builder and believes that this helps but wants to maintain balance because there are times when tough decisions must be made.

Phillip

Before becoming a principal, Phillip taught high school for about 10 years in a small inner-city school district. During that time, he spent a year at an alternative school for students who had previously been removed from another alternative school. After that, he received his master's degree in administration before transitioning into a principalship. He learned that he wanted to become an elementary principal after spending time in an elementary setting during his leadership internship. In this setting, he felt more involved and confident that he could have more of an impact on students across the board.

His previous experiences in the classroom helped to inform his role as a principal leading inclusive and special education. During his time in the high school classroom, he became invested in one special education student's outcome, which helped him learn more about the special education process. Although he had this experience, he shared that he would like to know

more about the special education processes, which was not explicitly shared in the leadership preparation program he went through. According to Phillip, his current role and responsibility is to ensure that the teachers are following the processes correctly and to be a liaison for the parents. Before this year, he had to handle all special education because he did not have an assistant principal. He found it beneficial to attend all the IEP meetings because it allowed him to be very involved with the families and showed the parents that the school team, including the principal, cared about their learning. Phillip, who appears to be passionate about education, describes his leadership style as taking a restorative view and being open to different perspectives. He mentioned some challenges in leading inclusive special education, such as having limited staff, needing qualified and experienced teachers, and dealing with a transient population. Based on his experiences, he thinks one of the most important things school leaders need to know about leading inclusive and special education is individualization.

Raphael

Raphael is currently the assistant principal in a high school in an urban setting. Previously, he worked as a dean in a suburban school district. Having been an assistant principal for only three years, he is still working on developing his leadership style and approach. However, he has strong values and beliefs regarding leading inclusive education programs. In his current role, he is responsible for helping to create the master schedule for the building and always considers students with disabilities first. He serves as the LEA at his school, is one of the instructional leaders, and helps support students with disabilities. His role is also to use the data to support students and help to improve student performance. He considers himself a reflective leader and is open to having a dialogue with his colleagues to increase student performance. He finds that having a good support system of educators with various roles and responsibilities is

helpful to him as he makes daily decisions in his leadership. As he continues to grow as a leader, he questions and reflects on what may help him further develop his leadership style.

Tiffany

Tiffany works in a suburban school district in a middle school setting. Her current role is an administrative position with the title coordinator of special education. She has been in this role for three years. She began her career as an instructional assistant for special education, which is where she learned that she enjoyed working with students with disabilities. She describes herself as having had a good introduction to special education. The human resource office encouraged her to begin teaching special education because she already had a bachelor's degree in liberal arts and needed only one additional class to be hired as a provisional special education teacher. She taught English, math, science, and social studies as a special education teacher. Additionally, she had a social skills group and a study skills group.

In her current role, she serves over 200 special education students, including students on the standard learning track and students on the alternate standards of the learning track. She spends her time supporting teachers in the classroom, specifically working with students on alternate learning standards and ensuring that both students and teachers have the proper resources to address instruction, behavior, and online format learning. Additionally, she serves as the LEA in her building and attends all the IEP, eligibility, and child study meetings. She also leads transition meetings for middle school students and those entering high school. She describes her duties as varying from day to day. The support she provides can range from collaborating with general education teachers and instructional assistants to responding to what the central office staff may need regarding special education. She also must ride the bus if there

is no staff member to ensure that the IEP is followed if a student needs adult assistance on the bus.

Results

The findings from this study were based on responses from the individual in-depth semi-structured interviews, reflective responses from the participant journals, and the focus group interview. There were 10 participants in this study, six of whom participated in the focus group. The modified Van Kaam analysis (Moustakas, 1994) was used to characterize participants' leadership experiences and reveal the commonalities and differences between their experiences. NVivo was used to code and organize the interviews, participant journals, and the focus group session to achieve horizontalization, reduction and elimination, clustering and thematizing, validation, individual textural description, individual structural description, and textural-structural description.

To maximize the participants' experiences and avoid my bias, I practiced epoché by journaling using a reflective journal (Appendix D). During the data analysis process, I focused on listening to the participants' experiences and validating themes until saturation was reached among participants. The interviews formed a collective description of school leaders' experiences leading inclusive and special education programs. Furthermore, I used the interviews, participants' daily experiences, and focus group data to reveal themes among participants related to the research questions and sub-questions.

Theme Development

Table 2 presents the themes as they emerged. After triangulating the data from the semi-structured interviews, participant journals, and focus group, several themes emerged. Triangulation provided a comprehensive understanding of leadership experiences and revealed

major themes (Patton, 1999). I triangulated phrases, keywords, and vivo participant quotations to determine consistent outcomes among participants. After I finished the coding, themes began to emerge based on reoccurring codes between participants' interview responses, journal entries, and focus group comments. The validation process was completed by comparing the major themes to the triangulated data. Four themes emerged and one sub-theme. Table 2 explains overall theme development, and an explanation of each theme follows.

Table 2

Theme Development

Open codes	Themes
meeting students' needs modeling instruction helping a colleague prepare responsible for overseeing special education processes organized IEP meetings "I would have like to know more about dealing with an advocate." "I wish I had known more about the IEP and eligibility process." "It would be beneficial to delve a little deeper into legalities of special education in leadership preparation programs."	Leadership Experiences Motivate Acquiring New Knowledge Sub-theme: <i>Leaders Identify Gaps in Their Knowledge</i>
Open codes	Themes
"I am reflective and self-aware." "I am good at making sure morale is not zero." family style be transparent "I seek feedback on what I could do better."	Developing Leadership Style Based on Self- Awareness
Open codes	Themes
learning by doing "Seeing students' progress motivates me." talking to other school leaders to see how they handle certain situations	Leading through Experiential Learning and Collaboration
Open codes	Themes
"Some teachers are unwilling to be inclusive." "Students require the best." "Students are the priority."	Leading a Diverse School Culture Using an Inclusive Mindset

Major Theme 1: Leadership Experiences Motivate Acquiring New Knowledge

The first major theme, Leadership Experiences Motivate Acquiring New Knowledge, emerged from the semi-structured interviews, participants' journals, and the focus group. Knowles's (2015) adult learning theory explains how adult learners are intrinsically motivated rather than extrinsically motivated. Collectively, participants shared that their primary motivation for acquiring new knowledge was student progress. A lack of knowledge or reflection on previous experiences can motivate leaders to learn. Nyla stated, "One of the things that I have been trying to seek out is other opportunities for growth because I don't feel like there was a lot of guidance toward being a leader over special education." She further explained her motivation to acquire new knowledge: "What motivates me is just like seeing the kids every day and making sure they are provided with the right instruction and knowing if they are receiving specially designed instruction."

Although all participants shared that their motivation to learn was based on the students, some indicated additional motivators. Kary shared that she is motivated by fear: "I mean, outside of the fear factor, it really is that you don't want to end up in some legal mess for a lack of knowing, you know, having good intentions but just not knowing, and this is what motivates me to learn more about special education" (personal communication, 2022). She further stated, "I continue to seek out professional development" (personal communication, 2022). Additionally, school leaders found that they wanted to be deemed professional and knowledgeable, which supported their motivation to learn more about inclusive and special education programs. Raphael stated, "As a professional, it important to share knowledge or be quick in my role. . . . You can't know everything, but you have to have a solid foundation and know what to do in this position" (personal communication, 2022).

Corey, an assistant principal, described his motivation to acquire knowledge based on making mistakes at work that impacted student progress:

So, there was a situation where we just didn't know how to help a student, and he wasn't getting the best quality support that we could have given him in that situation. That's one situation where I'm going to want to learn more. I'm going to want to know the best way to handle a student with this type of challenge. . . . What's the best way to do that? That motivates me. That's probably my number-one motivation. (personal communication, 2022)

Amanda describes her motivation to learn, by focusing on student outcomes. When asked what motivates her to learn, she stated the following:

One wanting to improve the students . . . well-being . . . [to] make them be successful. . . . That's always my drive. You know that all students can learn, and you know how you get there. It might be different avenues or whatever. And that's my motivation—to keep on learning and to keep on . . . making sure that I have knowledge of, you know, different things and cultures and if I don't know, I will ask, and, you know, I think, knowing that you don't know everything. That's my motivation. I want to always make things better and make sure that we put in 110% effort into doing that. (personal communication, 2022)

Tiffany described her leadership experiences as being supportive of teachers so that the teachers feel equipped to support the students. Based on her leadership experiences, she stated that she is motivated to acquire new knowledge because she wants to make sure

that our students are getting everything that they need, especially support that they may need in different areas. So, making sure that they are supported and making sure our

teachers are supported and that they're getting what they need. (personal communication, 2022)

The sub-theme *Leaders Identify Gaps in their Knowledge* emerged from the major theme Leadership Experiences Motivate Acquiring New Knowledge. As school leaders completed their roles and responsibilities, they recognized gaps in their knowledge that motivated them to pursue new knowledge. Based on their responses, participants indicated a need for professional development and identified what they lacked before becoming inclusive and special education leaders. The problem is that their previous academic programs did not have special education coursework or experiential learning opportunities. Participants identified gaps in their programs and what they felt administrators needed to know before leading inclusive and special education programs.

Several participants described beginning their careers as provisionally licensed by taking one course before going into the classroom to complete their program to receive their teaching license. Some of them found teaching special education with provisional licensure complex but grew confident and were motivated to achieve upward mobility in their roles of leading inclusive and special education by adding an endorsement of administration and supervision K–12 or receiving an educational leadership degree with the administrative endorsement. The participants who did not have previous experiences in special education or were collaborative general education teachers reported a lack of knowledge in inclusion and special education processes. Raphael stated, “I wish I knew more about the process—the IEP process and also eligibility process” (personal communication, 2022).

Based on their responses, participants indicated a need for professional development and identified what they lacked before becoming inclusive and special education leaders. The

problem is that their academic programs did not have special education coursework or experiential learning opportunities to address what the study participants felt administrators needed to know before leading inclusive and special education programs.

Professional development is the opportunity for school leaders who may not have received adequate preparation in their university-based preparation programs to continue to learn through embedded on the job training. According to Knowles's (1984) adult learning theory, adults need to be a part of their planning and evaluation when learning. An elementary principal shared what kind of professional development he believes teachers need to help him lead:

I think every teacher . . . needs to go to watch the child study process [to] really look at how that [document] was written and how that impacts your class [and] what that means on a day-to-day basis. I think there's an understanding and a perception of what that means, but not really a true grasp of the whole process and the whole ramifications [for] a teacher. (personal communication, 2022)

Ashley shared what she felt leadership preparation should include. In her participant journal, she reflected on her participation in an IEP meeting. She stated, "I feel it would be beneficial to delve a little deeper into legalities of special education in leadership preparation programs to help leaders of special education programs be fully prepared for all aspects of the job" (personal communication, 2022).

Based on several responses, there appears to be a practical learning gap in leadership programs. Cameron discussed what he wished had been included in his program:

The most important thing is really having some well-rounded tools . . . to identify what good teaching and learning look like and then to have skills to coach others in, you know, how to provide that good teaching and learning. And in meetings, they're able to facilitate

the meeting and ask the right questions. . . . It helps them to know the right information that best supports students. (personal communication, 2022)

During the focus group, Phillip added his input about his experience in his principal program:

I feel like when I came out of my principal program, I didn't have those tools in my toolbox. I knew the legal aspects, but I didn't know really how to lead things on the ground. I had to kind of learn to let go, which seems kind of backwards, but that's kind of where we are. (personal communication, 2022)

Nyla, an elementary assistant principal, responded during the focus group interview, indicating similar sentiments: "I guess I can say the same thing. I wish I had known what the process is without, you know, being the special education chair. I wish I just knew more of the process for sure" (personal communication, 2022).

There was a consistent pattern as leaders described their experiences, which helped to solidify a shared collective understanding among participants and their motivation to acquire new knowledge by identifying their current gaps in understanding how to lead inclusive and special education programs.

Major Theme 2: Developing Leadership Style Based on Self-Awareness

According to Burns (1978), transforming leadership occurs when leaders and followers work together to increase morale and motivation. The next major theme that emerged was Leadership Style Based on Self-Awareness. The data from the study strongly indicated that the participants were able to look within themselves in determining how to be better leaders for special education programs. This self-awareness was consistently seen as the participants sought

to strengthen their leadership styles and expertise. Corey, a middle school assistant principal, shared his thought process of being a transformational leader:

I'm transformational. I like to see change in the right positive direction. So, as I say reflect, again, I'm just wondering, Am I making a difference? And am I motivating my teachers the way they need to be? Motivated meeting them at their level? Am I being clear in my communications, so they know the expectation? (personal communication, 2022)

A critical responsibility of the school leader is to monitor and develop the decision-making process during IEP development and implementation (Thurlow et al., 2013). Phillip shared an experience of IEP meeting when he increased his self-awareness by recognizing his emotional turmoil:

Our ethical responsibility is to ensure this child is placed in his least restrictive environment. The other school in our district has a program designed for students with his disability, and if he is not able to be academically successful at my school, it would likely be a less restrictive environment. It may hurt my heart, but our conversation with the family was a positive one. We will implement the IEP as it is written now, keep tracking data, and reconvene to make a decision. Being a leader of inclusive and special education programs often means putting personal feelings aside and staying focused on ethical and legal obligations. (personal communication, 2022)

During the focus group interview, Cameron shared his experiences of developing his leadership style while leading inclusive and special education. He realized that he felt transparency was impactful when connecting with the families and leading IEP teams.

Transparency is a leadership style that sets performance expectations for all staff and creates an open, honest culture (Youshaei, 2021). Cameron stated the following:

I think the big thing is to be transparent. So it's just all about transparency, you know, letting everybody know the process. Everybody knows the steps. Create some steps with the group, you know. When you're dealing with a family and an IEP team, just have some steps in place, give them a timeline. . . . I tell people that I support . . . that you don't want to assume with families. You want to make sure that they are included, you know. It's what they want. . . what they're thinking. Now, when you propose something and use the eligibility, we're using the documentation. You should use the tools, the worksheet. All the things are going to reveal an answer about what you feel or what should be. . . . Use your data, and use your worksheet, and that's going to give you the answer. And so, I think that's how you kind of come out with the result that is morally and ethically sound. (personal communication, 2022)

Transparency was a repeated term and sentiment shared by participants, leading to leadership development through self-awareness. Phillip shared his perspective on transparency:

I think being transparent, not predetermining, and keeping the best interest of the child first helps, and at the end of the day if I have gone through the proper steps, then I am leading with transparency. (personal communication, 2022)

The IEP process plays a significant role in school leaders' experiences when leading inclusive and special education programs, causing them to reflect on their previous knowledge, experiences, and ethics as they navigate their roles. In participant responses, self-awareness was evident in how leaders reflected on their process of facing challenges and problem solving within their roles. Leaders developed self-awareness using their reflections on their daily experiences

and problem-solving strategies, which helped to inform their leadership practices. A leader's response impacts teachers' jobs and attitudes (Conley & You, 2017; Wiyono, 2018). Kary, a new assistant principal, demonstrated self-awareness in recognizing the value of feedback from staff and special education experts:

I approach challenges by being resourceful because there are a lot of other people who have more experience with inclusive education programs. I lean heavily on my principal. It has led to experiencing scenarios leading inclusive and special education programs. (personal communication, 2022)

Nyla describes how her leadership style developed in relationship building by leading through self-awareness. She realized the significant connection between supporting teachers and its impact on supporting student progress:

One of my strengths in the classroom was my relationship building and whether with kids and parents and teachers, and I felt like I brought that with me into being an instructional leader. You know, one of the first things I did when I first started even our virtual year was, you know, I reached out to all the staff and scheduled one-on-one conversations even though we weren't in a building together. I wanted them to know that I really do care about who they are as individuals because. . . I feel the same way if I take care of you and nurture you, then you want to make sure you're taking care of our kids. (personal communication, 2022)

Relationship building is a powerful tool when leading and helps improve teachers' morale. Participants indicated that continuous improvement motivated their critical self-reflection process. Mezirow's (1991, 1995) transformative learning theory includes critical self-reflection, which impacts the frame of reference, habit of mind, and point of view. Ashley

describes her critical self-reflection process, which led to leadership development through self-awareness and continuous improvement within her role:

Every day I replay every single meeting I've been in and think of ways that it could be better so that if I'm in that situation again, I will handle it. Either the same way if it was a good meeting, or in a different way if there was something that could be improved on. So, I'm just constantly analyzing what I'm doing and asking other people what their thoughts were if they felt that I was successful and able to clearly communicate what I was trying to communicate or where they would want me to change. (personal communication, 2022)

Kary's leadership style includes seeking feedback to become more self-aware as a leader. She provides the staff with 10 questions to receive their input. She stated, "I want to know that they feel supported. It's not always super feedback, but I don't take it personal, and I pivot to meet the needs of the staff" (personal communication, 2022).

Major Theme 3: Leading through Experiential Learning and Collaboration

Knowles's (2015) andragogy learning theory frames the context of how adult learners need hands-on experience and less instruction to create space for autonomy and problem solving. Responses from the participants support Knowles's theory that adults find task-oriented learning most impactful when it aligns with their reality. Hence, adults are more engaged and willing to learn when it directly impacts their job or personal life (Knowles, 1984). Participants were asked about their learning from job-related experiences. Collectively participants shared that they learned the most while doing the job and later recognized through transformational learning, which includes critical self-awareness and identifying areas of improvement. Leading through experiential learning and utilizing collaborative teams were prevalent throughout the participant

data and a shared experience among participants. The participants' data revealed that these factors were necessary to make decisions and complete their daily leadership practices.

Tiffany stated that after several years in education, she continues learning in her administrative role. She often relies on the expertise of those around her and uses collaboration as a practice to make informed decisions about situations that she may lack knowledge in navigating:

I did not really have the knowledge of how to handle and how to deal with those situations. So working closely with our specialists working closely with our principal in the past, working closely with our dean of special education, kind of helped me maneuver through the areas where I wasn't really sure, or I really didn't know what role that I needed to take in different situations. But that support system had been very evident and very important for me, and just being able to collaborate with different special education coordinators, and their roles and the things that they were doing all of that really helped me to develop and to get that knowledge that that I needed in order to move forward in different areas. (personal communication, 2022)

Participants shared how they relied heavily on collaborating with others to learn how to lead in their respective roles. The data from the participants supported the need to learn by doing, and to have specialists and teams supporting their ability to remain student centered and make the most informed decisions for students. Ashley shared how she leaned on her school team during an IEP meeting. Learning through her experience from IEP participation helped shape some of her values and beliefs as a school leader and the impact that teamwork has on problem solving and decision making. Ashley stated:

At the conclusion of the meeting, there was some confusion regarding who should sign to give consent, as well as confusion on how to get the documents to the biological parent that is not able to know the foster home address. Again, collaboration came through, and an arrangement was made. (personal communication, 2022)

Several leaders found themselves having intellectual partners or a support system that could help them navigate some challenges. Amanda shared how much she values her community within her school: “We work together as a team. I value teams and collaboration. I value community. And I believe that all students have their part and their purpose and their community if they’re given the right tools to navigate” (personal communication, 2022).

Ashely shared through her participant journal a reflection about one of the daily challenges that she faced during an IEP meeting and how she resolved it using a collaborative approach:

Again, collaboration came through, and an arrangement was made. This type of situation [foster student] is not really discussed in leadership training, and experience has played a large part in my knowledge of how to lead during these situations. (personal communication, 2022)

Nyla, the assistant principal at an elementary school, shared her experience of recognizing the need to learn to lead through collaboration. She realized that leading goes beyond knowing school law and includes leadership characteristics revealed through experiential learning, which she believes significantly strengthens her role as a school leader. She expressed this way:

Everybody has been thrown to the wolves to learn how to do things on the fly. And I think that’s what makes you a stronger administrator. You have to be someone who can

be creative, but you also have to be resilient, and you have to be a fast learner because if you don't learn things as they happen and you keep making the same mistakes, you will find yourself back in the classroom. (personal communication, 2022)

School leaders' daily experiences vary, whether working to organize special education meetings, to problem-solve, or to support staff. Many of these scenarios require school leaders to grow and transform their perspective and knowledge to increase effectiveness in their school building. Kouses and Posner (2012) found the significance of enabling others to act, which builds collaboration and trust and facilitates relationships. Participants collectively emphasized the importance of having a team to deal with daily leadership routines. Staff tends to respond better to a team approach to build efficacy and confidence (Alridge & Fraser, 2016). Phillip notes that he does not have "too much pride" to seek guidance and support to problem-solve with the teachers in his building. He said they do not always "see eye to eye" but have mutual respect and can reach a consensus. The data showed that learning to lead through experiential learning and incorporating collaborative partnership were critical to school leaders' navigating inclusive and special education programs.

Major Theme 4: Leading a Diverse School Culture Using an Inclusive Mindset

An inclusive environment welcomes all learners regardless of their abilities. The influence of school leaders impacts the follow-through of an inclusive mindset. The response to the interview question about the sharing of the schools' vision of inclusion prompted Nyla to share the following response:

In my conversations with teachers, I continue to share just my, my idea of, you know, having a growth mindset and making sure it's not just . . . teachers that have all the kids [with disabilities]. In my classroom, it was always about the power of *yet*, and helping all

of our kids know that . . . it's not that you can't do this thing. You just can't do it yet. And for some of our kids, they need more scaffolds to help them get to that point . . . or we need to change the vision of what success looks like for each kid as an individual.

(personal communication, 2022)

Sakiz (2017) found that inclusive education requires teachers to design learning environments and activities that provide challenging curricula and lead to growth and development for all learners. Cameron said that he shares his vision of an inclusive school culture by encouraging teachers to always have high expectations for all learners:

I feel that all students deserve kind of the best, and so inclusion requires that you have to think of that big picture and then kind of those that need help within that, get it. But I'm still striving for what I call age-appropriate grade-level content. (personal communication, 2022)

Common to all the leaders in the study is a student-centered approach. When asked about their leadership all the participants mentioned student outcomes as part of their values and beliefs when leading inclusive and special education. Kary shared the following:

I believe that every child can learn, and I value working with people who have that same belief and will roll up their sleeves and do what needs to be done to meet the student's needs. And to have them come back years later and say, "Thank you, Mrs. Such-and-such, for helping me through this." . . . Because then I'll know . . . your intentions and everything are good. (personal communication, 2022)

Ashley strongly affirmed, "Students come first no matter what. They are the number-one priority." When asked about her values and beliefs as a leader, she responded:

So, we need to do whatever we can to make sure that their needs are met, while at the same time making sure that the staff feels supported and able to actually provide what the kids need to know that they come first and can be successful. (personal communication, 2022)

Inclusive education focuses on classroom barriers and accessibility, and people may assume that it involves only students with disabilities (Schuelka et al., 2020). However, according to some participant responses, the barriers are staff members who are opposed to inclusion. Ashely expressed the following:

One of the frustrations can be still those teachers that aren't as accepting. It does tend to be the teachers that have been in education for quite a bit longer than some of the new ones. The newer teachers seem to be more open. But the ones that are against inclusion tend to be a little more vocal. (personal communication, 2022)

Nyla added that she feels that general education teachers are unprepared to accommodate inclusive classrooms: "I don't feel like general education teachers get the level of professional development that they need to support someone with . . . disabilities in their inclusive classrooms" (personal communication, 2022).

Amanda identified a barrier that revealed staff unwillingness to adopt an inclusive mindset and discussed a staff shortage that impacts her in leading inclusive programs in her building:

One of the biggest struggles is staff that is unwilling to be inclusive. So, we do have several staff members that feel that if a student has an IEP, they need to be fully self-contained and should not be in Gen Ed, basically ever. So, we do a lot of explaining and kind of baby steps to get those kids where they need to be and then we also look for

teachers that are more willing to practice the inclusion and have those kids have those opportunities because it's not going to be successful if the Gen Ed staff is not on board.

So, we want to make sure those kids are fully supported, which also brings the struggle of staffing, because we don't always have the staff that we need for true inclusive opportunities. (personal communication, 2022)

The four major themes and one sub-theme were used to respond to the research questions and sub-questions. The participants' shared experiences revealed their description of leading inclusive and special education.

Research Question Responses

Knowles's adult learning theory and Mezirow's theory of transformative learning were the frameworks used to develop the research questions. The phenomenological model outlined by Moustakas (1994) was used to reveal the textural and structural essence of school leaders' experiences leading inclusive and special education. The research questions aimed to lead to open dialog with the participants to capture their experiences in leadership. Responses from the semi-structured interview, participant journals, and focus groups were also coded using Braun and Clark (2006) thematic analysis process to answer the research question.

Central Research Question

The central research question is "How do school leaders describe their professional experiences in leading inclusive and special education programming?" The results of this study revealed that the school leaders' collective experiences support the following major themes and subtheme: (a) Leadership Experiences Motivate Acquiring New Knowledge with the subtheme *Leaders Identify Gaps in Their Knowledge* (b) Developing Leadership Style Based on Self-Awareness (c) Leading through Experiential Learning and Collaboration (d) Leading a Diverse

School Culture Using an Inclusive Mindset. School leaders describe their professional experiences as a collaborative effort to support an inclusive culture and improve student achievement for all learners.

The themes are grounded in the theoretical framework of Knowles (2015) and Mezirow (1995). The participants reflected on their professional learning experiences, values, and beliefs that contribute to their decision making while leading inclusive and special education. Having direct experience in leading inclusive and special education caused school leaders to be more confident in their ability to lead, causing them to be motivated to acquire new knowledge through their leadership experiences, which led to the major theme of Leadership Experiences Motivate Acquiring New Knowledge. Kary, a second-year assistant principal and former elementary collaborative teacher, found that her previous professional learning experiences, values, and beliefs helped guide her leadership approach in her current role:

My values and beliefs that every child can learn every child can learn . . . with the right people and the right processes. Every child can learn. I think it's really a mindset. And sometimes it's difficult to have those conversations with people who don't believe the same and will give you every excuse as to why they cannot. And I will say, as a classroom teacher, it was really rewarding to prove people wrong in that regard. A lot of people didn't think it was fair that I got the collab class every year. And I actually enjoyed it. It was like some kind of unspoken rule that you're supposed to rotate it, but my kids were thriving. And so, if it ain't broke, don't fix it. But I will say they were thriving. And it really takes a special skill set to collaborate with another professional that closely and really trust building that trust and relationship with them. And so, I think all

of that kind of goes back to my core values . . . and beliefs (personal communication, 2022).

She stated that in her school she is “always looking to support” and therefore is adamant about learning more about the special education processes to become an active participant in IEP meetings. She describes herself as “resourceful” when it comes to problem solving. She reports that her leadership experiences have given her satisfaction. As an inclusive and special education leader, she stated that she experiences a great deal of satisfaction: “The satisfaction is always in seeing the data, seeing scholars grow and progress, [and] hearing feedback from the families” (personal communication, 2022).

The character of a school leader influences both teachers and students (Brown, 2006). One question explored the leadership style of participants in this study. Corey described himself as a transformational leader who is constantly reflecting on whether he is motivating teachers and being clear in his communications. He discussed how he will happily go into a classroom to learn from a teacher whose students are excelling:

The same kid might be getting an A in this one setting and getting the D in another setting. But what are some things that you’re doing that they can share? And so, you know from my leadership experience of that, that’s transformation itself. Well, how can we take these skills and use them here, so I need to go in and find out. It’s building relationships so that’s a process that we can do. (personal communication, 2022)

Developing a leadership style based on self-awareness is an ongoing process, and an effective leader moves beyond everyday wants and needs to reach higher values and increase knowledge (Burns, 1978). The major theme of Developing Leadership Style Based on Self-Awareness included participants’ responses on the significance of transparency. Transparency in

leadership is essential because the way leaders communicate their vision will influence others to have a common vision and shared aspirations (Kouzes & Posner, 2012). Cameron shared that he focuses on leading with transparency: “I think the big thing is to be transparent. So, it’s just all about transparency. You know, letting everybody know the process” (personal communication, 2022).

Relationship building and transparency were both prevalent and recognized as a predominant approach to leadership style. Corey affirms that his approach to relationship building increases transparency, communication, and trust, all of which are essential in leading inclusive and special education: “Transparency is key, and I would add to that communication because you want to build trust of those people that you’re working with” (personal communication, 2022). Nyla also identifies herself as a relationship builder, a leadership style she developed as a teacher: “One of my strengths in the classroom was my relationship building. Whether with kids, parents, or teachers, I felt like I brought that with me into being an instructional leader” (personal communication, 2022).

The participants described their desire to continuously improve within their profession, and this concept is supported by the identified subtheme *Leaders Identify Gaps in Their Knowledge*. According to transformative learning theory, practitioners must become aware and critical of their own and other’s assumptions (Mezirow, 1995). The experiences of continuous improvement impacts leaders’ ability to process feelings and their character, which is a corollary of Mezirow’s (1995) transformative learning theory. Ashley practices critical self-reflection in hopes of improving her performance: “Every day I replay every single meeting I’ve been in and think of ways that it could be better so that if I’m in that situation again, I will handle it” (personal communication, 2022). Collectively, participants shared the significance of student

learning and outcomes as a motivator to learn and continuously improve to increase student outcomes. Nyla expressed it this way:

I think what motivates me is just like seeing the kids every day and just wanting to make sure that they are provided with the right instruction that the you know, that if they're receiving if they've been designated as a child who deems that needs, specially designed instruction, that they are actually getting it and that it is, you know, in their best interest and you know of benefit for them to show progress. (personal communication, 2022)

Sub-Question 1

Knowles's andragogy learning theory holds that adult learners' experiences are the most valuable resources to learning (Knowles, 2005). Sub-question 1 seeks to understand this factor: "How do school leaders who lead inclusive and special education describe their experience using special education knowledge to manage inclusive and special education programs?" The subtheme *Leaders Identify Gaps in Their Knowledge* emerged from experiences shared by the participants. Nyla does not have a background in special education but relies on her experiences and professional development from the division to increase her knowledge to manage inclusive and special education:

... so, to prepare for my leadership program, I received a leadership endorsement which was an add on to my literacy reading specialist master's degree. So, when I added on my endorsement for leadership, I don't feel that I received special education coursework outside of my school law class. There was no explicit instruction for leadership and being over special education, I was at a loss... I'm thankful for having my classroom experiences and having the observational experience of being in IEP meetings or

eligibility meetings, but I definitely I feel like I've learned a lot just kind of being in the position as I go. (personal communication, 2022).

Transformative learning and adult learning theory are grounded in Mezirow's (1995) and Knowles's (2015) theoretical framework. The way participants experience learning and actively apply knowledge in their practices is described by Philip's response as he shares how he transforms his previous knowledge and on-the-job learning and puts it into practice:

You learn a lot—I mean, special education. You read about it, and you learn about it in school, but then when you're in the in the real moment, it's very different. . . . A lot of my learning for special education and inclusion comes with just listening and talking to special education teachers or talking to other school leaders and how they handle certain situations and, you know, looking at obviously with the laws/regulations. But you know, really truly figuring out what's best for the student and who's failing and kind of helping students through . . . Taking what I've learned through my classwork and my experiences and try[ing] to help families through that process is, I think, such a big part about it because trying to help people feel comfortable with what's happening or when your student gets identified as special education . . . Helping people through that process is I think is an important part of taking your learning into action. (personal communication, 2022)

Tiffany reflected on her previous experiences before becoming a school leader and found that her background knowledge increased her confidence and informed her leadership practice. She described how her experience using special education knowledge as a leader in her building:

The biggest thing really was me being able to write IEPs knowing what would go into the present level, knowing different disabilities and different students and really that

background of being able to work in different content areas with different teachers in a Gen Ed setting and also in that pullout setting. It kind of gave me an overall view of special education and what students need it. Writing IEPs for kids just that paperwork portion of it. Being able to hit those deadlines of when IEPs were due, communication with parents. It was a great thing that I had built some relationships with parents. So when I became the coordinator, I think it was a little easier in that aspect because a lot of the parents knew me. I was a cheerleading coach also at that time, so they knew me in different roles. So not only facilitation teachers, specifically, and parents, but Gen Ed parents also knew me and knew my heart and knew that I really cared about the students. (personal communication, 2022)

The school leaders who lacked adequate preparation before leading special and inclusive education describe their experiences differently. Professional development seeks to develop skills, knowledge, and achieve a common goal to meet the needs of the students (Stoisch et al., 2018). Because a lack of knowledge impacts students, several school leaders described their experiences with professional development and what kind of professional development is needed to lead inclusive and special education programs. Raphael shared what kind of professional development would be helpful in his role, such as “navigating advocates” and “knowing what language to use” in different special education meetings (personal communication, 2022). Kary found that professional development did not help to develop her as a leader. When asked what was missing, she stated, “It did not give me any practical knowledge.” At the start of the academic school year, Nyla had limited understanding of special education, and as a result, some of the professional development offerings did not make sense to her until she experienced them

in action. Therefore, this professional development did not become relevant until later. Nyla explained:

The PD was for compliance stuff. And a lot of it I think, was things that, given my lack of experience, I couldn't take in as much. Well, I didn't really, you know, I couldn't really absorb because I didn't have the experiences . . . that I have now where I feel like, you know, with my newfound background knowledge, I will probably absorb those things better. (personal communication, 2022)

Practical knowledge relates to the major theme Leadership Experiences Motivate Acquiring New Knowledge and the subtheme *Leaders Identify Gaps in Their Knowledge*. Participants found a lack of practical knowledge as it relates to leading inclusive and special education. Amanda found that information has changed since she began her career, and some practical knowledge would help her. In response to the question of what she desired to know more about when leading inclusive and special education, she stated the following:

Knowing more about the different data collections coming straight into the, you know . . . Those are things you have to learn. Now, it's a little bit more apparent. That seems to be the focus on that. But when I began exceptional education, I don't think that it was stressed as much as it is now. And I'm not just talking about academic . . . I'm talking about, you know, social data—like you're at home and, you know, what makes up the child, all the pieces of the data, and how they fit together. (personal communication, 2022)

Practical knowledge for many participants is something that allows them to put processes into practice. Ashely noted that as a leader she is “always trying to streamline the processes” (personal communication, 2022). However, when information is not known, putting things into

practice can become difficult. Amanda has learned from different scenarios the need to have a strong knowledge base: “I feel it would be beneficial to delve a little deeper into legalities of special education in leadership preparation programs to help leaders of special education programs be fully prepared for all aspects of the job” (personal communication, 2022).

Sub-Question 2

The second sub-question investigated, “How do school leaders describe their experiences of being instructional leaders of specially designed instruction?” This sub-question is supported by the theme Leadership Experiences Motivate Acquiring New Knowledge and the subtheme *Leaders Identify Gaps in Their Knowledge*. School leaders describe their experiences of being instructional leaders of specially designed instruction as applying previous classroom experiences to improve instruction in the classroom. School administrators may lack knowledge of specific instructional approaches, such as responses to interventions (RTI), which is why it is important to understand their perspective on their ability to lead collaborative teaching partners and specially designed instruction (Pregot, 2021). Corey, an assistant principal of a middle school, shared that he struggles with RTI and interventions: “I’m kind of weak in this area, in terms of interventions and different programs” (personal communication, 2022). Participants who had a background in instruction and special education, however, felt confident in leading specially designed instruction. Amanda said, “I’ve experienced it. So I feel very confident in leading collaborative teaching or specially designed instruction” (personal communication, 2022). Even those with no special education background felt comfortable if they had had previous instructional experience. Although Nyla had no previous special education experience, she described herself as being a hands-on instructional leader who uses her previous experience as a collaborative general education teacher. Nyla also made the following observations:

I feel like my experience teaching in a collaborative class helped but each collaborative class is different. But I do feel like my experience with that myself, I'm able to, you know, have those discussions, and I even want to have more with general education teachers because, again, like I said before, as a Gen Ed teacher, I connect myself with the test scores and I am concerned about the testing and want to make sure that all students can learn and use different approaches from both the general education and special education teacher. (personal communication, 2022)

Cameron felt confident in his ability to be an instruction leader in specially designed instruction and collaborative teaching. He sees the bigger picture of instruction:

I think where knowing where special education fits into the whole scheme of things and being able to really identify what good teaching and learning look like, you know, from through to the whole school so they can have that that trickle down to special education. (personal communication, 2022)

Sub-Question 3

The third sub-question was “how do school leaders describe their critical self-reflection experiences when making informed decisions to create inclusive and special environments?” The major theme Leading a Diverse Culture Using an Inclusive Mindset supports how school leaders apply critical self-reflection when creating an inclusive culture for students and staff. All the participants described their critical self-reflection experiences as having self-awareness of their values and beliefs and their direct influence on the school's culture. Amanda shared how she works to improve by identifying the needs of the staff and reflecting on the strengths of the staff. Therefore, she's reflective of herself and the team when she makes decisions:

So I'm always trying to reflect on those things that I experienced that I know that would be helpful to me in the long run and to the school . . . and also reflect on our weaknesses and our strengths as far as, you know, knowing what kind of professional developments that I may need or the team may need in order to move forward the way we need to go when there are shifts and different transitions. I want to make sure that we're on top of it. So I'm always reflecting about even things in the news. If it were to happen at our school or if it [happened], you know, to our community, how can we be prepared? I'm just always in that constant mode of it . . . and in knowing about everyone's talents and gifts, you know, trying to match things that go to this person will be good for that. (personal communication, 2022)

Tiffany is self-aware of some of her staff's challenges to creating an inclusive culture. Therefore, she recognizes the need to ensure that the staff feels supported in fulfilling the school's vision through her reflection process:

I just want to make sure that our students are getting everything that they need, especially support that they may need in different areas—so making sure that they are supported and making sure our teachers are supported and that they're getting what they need. As we know, this time right now teachers are being burnt out very, very easily. Just trying to relieve some pressure for them in areas Just overall just making sure that special ed is running the way that it needs to run and that both students and teachers are given the things needed. (personal communication, 2022)

Kaplan and Owings (2013) asserted that school leadership and school improvement cannot be done independently. To support this notion, Phillip shared how he uses collaboration during the critical self-reflection process to make informed decisions:

It's hard especially when . . . you're by yourself and just know their administrators. That is one of the hardest things. It's very difficult to kind of, you know, see if you've done the right thing. So I do think I talk to people a lot, you know. I go to those people in your building you trust. "Hey, let me bounce ideas." You might be my guidance counselor, for example, or going to other principals in the division that have this situation. I think the biggest thing is I've always questioned my beliefs. So, you know, having an emotional disability process. For example, we have a lot of discipline issues. So a lot of it is picking up the phone and calling the district psychologist, calling the special education leaders, and saying, "Hey, this is what happened today. This is how this kid reacted. This is how the teacher reacted. What's the next step? What should I do going forward to her? I think I should assign this consequence, or I think I should make this adjustment to the student's plan. Does that make sense?" And I think that you have to ask those questions because, you know, that's where you get in a bad spot where if you just get into your own little vacuum and don't really think about it. You see things through your own eyes and doesn't go consider the other opinions. I think that's really getting into a dangerous spot. (personal communication, 2022)

School administrators' daily leadership decisions impact students with disabilities, families, and staff (Rinehart, 2017). Transformative learning challenges perceptions and assumptions of the world (Brown, 2006). Some teachers have negative perceptions of inclusive education for various reasons, which causes barriers for school leaders as they aim to make decisions to improve student outcomes in inclusive and special education programs. Ashely stated that some teachers "are unwilling to be inclusive" (personal communication, 2022).

Therefore, school leaders are charged with addressing these behaviors by knowing their teachers and how to influence them to decrease these barriers. Phillip shared his approach:

I think it comes down to how you team people. . . . So I paired the two of them together, and it was really great, and it'd be a really great partnership. So I think it's looking at the personalities of your teachers and who's going to work best together, but also who's going to buy into it and understanding that, you know. You might be if you're the best teacher I have, I want you in that collab setting at it because I want you to and that collab teacher to really work together and form a dynamic partnership too. The special education students need the best team., So it's all about finding the personalities.
(personal communication, 2022)

Summary

This transcendental phenomenology study aimed to arrive at the essence of school leaders' experiences when leading inclusive and special education programs. Phenomenological methods were utilized, and data were analyzed from in-depth semi-structured interviews, participant journals, and focus group interviews, which revealed four major themes and one sub-theme: Leadership Experiences Motivate Acquiring New Knowledge, Developing Leadership Style through Self-Awareness, Leading through Experiential Learning and Collaboration, Leading a Diverse School Culture Using an Inclusive Mindset. The subtheme *Leaders Identify Gaps in Their Knowledge* emerged from the major theme Leadership Experiences Motivate Acquiring New Knowledge.

The findings answered the central research question “how do school leaders describe their professional experiences leading inclusive and special education programming?” The following sub-questions were also addressed: (1) How do school leaders who lead inclusive and

special education describe their experience using special education knowledge to manage inclusive and special education programs? (2) How do school leaders describe their experiences of being instructional leaders of specially designed instruction? (3) How do school leaders describe their critical self-reflection experiences when making informed decisions to create inclusive and special environments? Ten participants took part in the study, and their information is outlined in Table 1. The theme development is shown in Table 2. The study's findings revealed that school leaders lacked special education and inclusive education coursework, resulting in an increased need to rely on colleagues. The participants' collective experiences revealed a new perspective on what school leaders need to know and experience when leading inclusive and special education programs.

CHAPTER 5: CONCLUSION

Overview

The purpose of this qualitative, transcendental phenomenological study was to describe the experiences of school leaders as they lead inclusive and special education programs in three school districts in Central Virginia. This chapter provides a summary of the thematic findings and an interpretation of the findings. The chapter will continue by examining implications for policy and practice as well as the theoretical and methodological implications. The next section will discuss the limitations and delimitations of the investigation. Lastly, the chapter will conclude with the recommendations for future research.

Discussion

The role of school leaders has evolved. School leaders encounter many experiences that motivate their learning and prompt them to transform their knowledge into practice. School leaders' descriptions of their experiences in leading inclusive and special education programs provide new knowledge and reveal practices that can better prepare future school leaders and further develop current leaders. Although school leaders have traditionally filled hierarchical organizational roles (Connolly et al., 2019), effective leaders must learn to move beyond hierarchical relationships and influence teams to implement inclusive and special education programs. Leaders must be prepared to address challenges in leading inclusive and special education by being motivated to transform knowledge to create schools that promote social justice and inclusive communities (DeMatthews et al., 2019). The theoretical framework guiding this study is Knowles's (2015) adult learning theory and Mezirow's (1995)

transformative learning theory. The study's findings are grounded in theory, and the findings are supported by the relevant literature outlined in Chapter 2.

Interpretation of Findings

The central research question was used to explore the lived experiences of school leaders leading inclusive and special education, including three sub-questions: (a) How do school leaders who lead inclusive and special education describe their experience using special education knowledge to manage inclusive and special education programs? (b) How do school leaders describe their experiences of being instructional leaders of specially designed instruction? (c) How do school leaders describe their critical self-reflection experiences when making informed decisions to create inclusive and special education programs?

The participants described their experiences leading inclusive and special education and revealed how the implications of their role impacted their participation in IEP meetings, their problem-solving process, and their approach to support staff (Major Theme 1). Several leaders shared that the major theme Leading through Experiential Learning and Collaboration was an ongoing process in which motivation and collaboration played an intricate role in their daily leadership patterns (Major Theme 3). Through reflection, participants considered their leadership style (Major Theme 2) and what kind of preparation (Major Theme 1) is needed to create an inclusive school culture (Major Theme 4). Themes emerged from the participants' responses to answer the central research question and sub-questions.

The first sub-question addressed how school leaders describe their experience using special education knowledge to manage inclusive and special education programs. All 10 participants found that their intrinsic motivation to increase student outcomes helped deepen their learning process (Major Theme 3). All the school leaders shared that they relied heavily on

collaborating with their colleagues when using their special education knowledge to lead. These collaborative experiences were described as having a "sounding board" when making critical decisions for students. Furthermore, those who had limited special education background knowledge or who had gone through several policy changes reported seeking the expertise of those in their building or from outside to better understand special education processes and how to implement them in their daily role. Additionally, school leaders identified what kind of professional development and practical knowledge would be helpful before entering their position and sustaining their role (Major Theme 3).

Sub-question 2 addressed how participants described their experiences of being instructional leaders of specially designed instruction. All 10 participants found that their previous instructional experience increased their confidence in their ability to support their staff's collaborative teaching and leading specially designed instruction (Major Theme 1). However, the challenge was ensuring that teachers balanced high expectations and exposed all students to grade-level content rather than focusing instruction significantly below grade-level standards. Nine of the 10 participants discussed modeling and coaching as a form of support they provide in the classroom. School leaders shared the difficulty of creating collaborative teams and the significance of being strategic in assigning teacher pairs because of the direct impact on student achievement.

Sub-question 3 addresses how school leaders described their critical self-reflection experiences when making informed decisions to create inclusive and special environments. The leadership style of school leaders impacts how they approach critical self-reflection, decision making, and their influence on inclusive school cultures (Major Theme 2). School leaders shared that being transparent, building relationships, and having the goal of continuous improvement

grounds their approach to leading inclusive and special education programs (Major Theme 4). Furthermore, their mindset of being student centered and being aware of the barriers that hinder an inclusive school culture assist in their critical self-reflection process as they repeat scenarios to help improve future outcomes.

Summary of Thematic Findings

The four major themes (Leadership Experiences Motivate Acquiring New Knowledge with its subtheme *Leaders Identify Gaps in Their Knowledge*, Developing Leadership Style through Self-Awareness, Leading through Experiential Learning and Collaboration, Leading a Diverse School Culture Using an Inclusive Mindset) informed this study and were interpreted.

School Leaders Routinely Use Collaborative Leadership. All 10 participants shared how they rely on collaborating with their own staff, staff from other schools, and central office leaders to better understand how to implement special education processes. Making informed decisions that impact a student's trajectory was a priority for participants. Before making decisions that affect student achievement and growth, school leaders will debrief or elicit more interpretations of a situation to gain a fresh perspective. Phillip, an elementary principal, referred to this collaboration as a "think partner." These relationships are vital since many school leaders have not been formally trained in special education and must rely on the expertise of IEP team members or those who have broader experience in facilitating, leading, or participating in IEPs. Mezirow's (1995) theoretical framework of transformative learning asserts that this new information is a resource in the adult learning process and becomes a "frame of reference." Notably, regardless of years of experience, all the school leaders reported having to be resourceful and to utilize the available expertise, especially when emotions became apparent in different situations.

Furthermore, as school leaders model their vision and mission for the schools, they exemplify collaborative teamwork by stepping in to help teachers in the classroom, actively seeking their input, and recognizing their strengths and abilities. Corey, an assistant principal of a middle school, shared, “I don’t mind going into a classroom and asking a teacher how they were able to get such and such to be successful and asking what they did to share it with another teacher.” According to Bateman et al., (2017) school leaders are responsible for the entire school and leading collaboration is critical in school leadership.

Special education leadership requires strong interpersonal ability and an advance knowledge of instructional methods (Strong, 2019). The participants in the study shared how, in addition to using their colleagues for decision making, they also created collaborative partnerships to support an inclusive school culture. Cameron advised, “Include everyone; you want as many people involved in your building as you can.” Additionally, he shared that during his daily leadership he must use collaborative leadership to create safe spaces that encourage growth: “I had two opportunities this week to collaborate with two different teams. What worked well with both groups was providing a safe platform to share ideas.” School leaders’ mindset of collaborative leadership alters the trajectory of student outcomes and creates a safe and inclusive space for staff.

School Leaders’ Leadership Style Influences Continuous Improvement. School leaders’ ability to find their voice and model personal guidelines is a leadership characteristic that influences their style (Kouzes & Posner, 2012). The participants in the study indicated continuous improvement as a factor that influences leadership style. Corey described himself as a “transformational leader.” In his reflective practices, he asserts that he frequently considers how he approaches his staff and how his leadership influences staff to reach a common goal; in turn,

he seeks their input to inform his practice best. All participants commented on the significance of a team effort. A team effort approach is supported by the literature as a means for building trust and facilitating relationships. According to Cetin & Kinkin (2015), transformational leadership includes inspirational motivation, intellectual stimulation, and individualized consideration. Leaders identified styles aligned with the characteristics of collaborative leaders, enabled staff, and inspired staff to reach a common goal.

Critical self-reflection supported the leaders' ability to become self-aware and identify their strengths and weakness and to know when they needed to seek out their respective teams for support. Mezirow's (1995) theoretical framework supports the process of reflection and action. Cameron stated, "I am reflective, and I'm self-aware of what my strengths and weaknesses are." School leaders indicated their active pursuit of seeking feedback to better assist in their decision making for students and collaborative teaching partners. Kary stated that she provides teachers with a survey so that she can actively "pivot her approach" when appropriate. The motivation to continue improving is also grounded in a desire to improve student outcomes. Amanda described her style as "'personable" and always "put students first," and this approach has motivated her to actively seek professional development and job-embedded training. The desire to continuously improve and seek new knowledge can also help to reduce factors that contribute to the high attrition of special education teachers (Conley & You, 2017; Player et al., 2017). School leaders must be reflective in managing their roles and supporting teachers' impact on student outcomes.

Leaders Learn through Experiential Learning Job Experiences. Burns (1978) asserts that leadership can be taught. Regardless of their educational background, all participants reported that they learned the most about their role through experiential learning. There are

various opportunities where leaders understand the value of their impact in IEP meetings and how they model their vision within their daily interactions with staff. Amanda shared that a person in her position must be “knowledgeable” and that she “stays on top of the trends and different programs” to be able to confidently and comfortably lead her staff. These learning experiences become apparent based on understanding the different perspectives of team members and staff. Corey stated in his in-depth interview, “But there's no substitute for field work as well. And I think each situation I try to take something from it to carry with me” (personal communication, 2022). Consistent with Sessa's (2016) findings, school leaders must actively seek ongoing professional development because they depend on others to help them construct reality. Therefore, as situations arise at work, leaders must learn from their team or experts outside of their building and recognize what they may need to know in the future. Knowles's (2015) adult learning theory uses the lens of supporting learners to target their job training needs. Cameron noted in his role that he has “observed learning by doing,” which helps him acquire new knowledge and translate it into action.

Student Centeredness is the Foundation of an Inclusive School Culture. Inclusive school leaders lead the pedagogy and personalized support for students and avoid marginalization (Florian & Beaton, 2017). There is a significant emphasis on being student centered when creating an inclusive school culture. The challenges that leaders reported regarding creating an inclusive school environment included the staff's mindset and their belief in their ability to educate all learners. Furthermore, Corey shared that another challenge is when staff members consider their needs first rather than the students'. Participants shared that some staff members are unwilling to support an inclusive school culture because of their challenges when educating students with different personalized needs. Cameron attributes some of this to

staff having a “misconception of students with disabilities,” and he further stated that teachers “may not want to try something new.” Each participant described how other factor impede the student centeredness of inclusive school cultures, such as determining teacher teams. Nyla’s approach to an inclusive environment is based on her mindset of remaining student focused: “I try to model that every student can learn to my teachers.” How a leader approaches inclusive practices directly impacts students’ achievement and values (Esposito et al., 2019).

Background Knowledge Leadership. Participants in the study who lacked background knowledge of special education responses indicated that they lacked comfortability and preparedness for leading inclusive and special education. When describing their leadership preparation programs, all 10 participants stated that their one course in school law did not provide practical knowledge of leading inclusive and special education. Consistent with Pazez and Cole's (2013) findings that special education is evident in leadership preparation programs, school leaders heavily rely on experts in their building to assist in decision making out of necessity. Kary mentioned a "fear aspect" to leading inclusive and special education: “I could have the best of intentions, but if I do not understand the legal aspects, I could be breaking the law and not know.” Phillip shared, “Because you take one course (it's the legal aspects course), you don't have to have all this experience. So I think we are now facing leaders who are coming into the job unprepared and then trying to train new special teachers who don’t know much more than just the legal aspects of it.” The lack of special education coursework impacts the overall ability of school leaders to lead such programs, impacting the inclusive school culture.

Implications for Policy and Practice

Implications of this study for policy and practice were based on the careful analysis of participant data. The findings from the study revealed that school leaders’ previous and current

experiences within their role influence the school culture and students' learning outcomes. The participants believed that remaining student focused, transparent, and knowledgeable has a significant impact on their leadership style and ability to lead inclusive and special education programs.

Implications for Policy

Participants noted a deficiency in their exposure to inclusive and special education coursework in their leadership preparation programs based on the finding. All participants agreed on the significance and desire to be well versed in the language of special education processes and how that language translates into best practice because school leaders are responsible for assisting and supporting staff to educate all students. From the presented data, there appear to be a need for institutions of higher education to consider how to incorporate such coursework into their degree requirements, specifically as it relates to the special education process and co-teaching. Several participants indicated that they learned how to lead in their position. Raphael stated, "No leadership program can prepare you for everything, but having the background knowledge can help maintain an inquiry mindset."

School leaders indicated their strong need to have intellectual partners as they navigated inclusive and special education. Therefore, at the district level, cohorts should be intentional and consistent with the support provided to school leaders new to managing inclusive and special education programs. These implications should focus on setting specific policies, laws, regulations, or possible implications for higher-level organizations or entities, such as school districts, state, or federal departments.

State policymakers should consider updating principal certification and licensure to include equity, inclusive practices, and special education to support building school communities

that are culturally responsive and able to work with all children. School leaders indicated a need to have more practical knowledge; hence, collaboration should be established between school leader preparation programs and school districts. Experiential learning opportunities should be offered to allow school leaders to observe IEP meetings, special education teachers, district attorneys, due process hearings, and family community partnerships of students with disabilities.

Federal policymakers should consider providing resources to states and districts to fund an inclusive culture for all learners, including students with disabilities. Furthermore, federal policymakers should prioritize programs and partnerships with school leaders and school districts to create programs that align vertically with instructional practices. Federal policymakers should align leadership standards and provide funding for school leaders to obtain the required number of hours to develop and sustain school leaders' knowledge of inclusive and special education programs.

Implications for Practice

The study revealed practical implications for school leaders and school districts, finding that participants understood the need to collaborate, to enable team efforts, and to support staff by building capacity modeling and leading with transparency. Furthermore, the data indicated that the perspective of continuous improvement helped to sustain leaders' focus on supporting teachers to help improve student outcomes. School leaders who actively engage with their staff and communicate their strengths and weaknesses are more likely to see teachers adopt changes that create an inclusive mindset. For example, in Amanda's in-depth interview response, she stated, "I know when I have met my staff's needs because we talk about something, I model it, and when I come back, the teacher is doing it in her classroom." Because Amanda indicated that she leads by modeling her expectations that align with inclusive school culture, it is implied that

her staff also follows her example. Considering that each participant focused on students, their ideas of achieving an inclusive school culture manifest in multiple ways that require school leaders to become aware of their perspective and can result in continuous improvement through self-reflection and transparency. As Cameron noted, “There must be a better way to support general education teachers [who are] working with students with disabilities.” Therefore, school leaders should offer opportunities for general education teachers to learn more about the different types of disabilities and the best instructional practices. Based on some of the challenges, such as staff being unwilling to adopt an inclusive mindset, school leaders must examine whom they hire closely. Since the mindset of staff is vital when creating an inclusive school culture, school leaders should consider the schools’ needs when hiring staff to ensure that the appropriate tools and questioning reveal prospective candidates’ mindsets and approaches in supporting an inclusive vision for the school and maintaining high expectations.

School districts should continue to provide professional development to school leaders and teachers to help equip all staff with an understanding of the available resources to meet student needs. Leadership programs should not only share the special education regulations but provide realistic scenarios that help leaders learn how to adhere to the regulations. Textbooks should also elaborate on policies and procedures that are relatable and relevant to current trends in education. Textbooks should also explore how to navigate the dilemmas that are not always discussed, such as moral and ethical dilemmas that participants shared occur during IEP meetings. During leadership programs, school leaders need experiential learning, whether participating in mock IEPs or attending IEP meetings with parent permission to help understand the IEP process. Leadership courses may explain that students with disabilities have IEPs but often do not present the complete special education process of finding the student eligible,

creating an IEP, and implementing the IEP. Instruction for aspiring school leaders should connect leadership skills to transforming the staff's mindset for leading inclusive and special education programs. Therefore, school leaders should ensure that they have developed a mission and vision for their school that emphasizes student centeredness and high expectations, inclusiveness, support for students with disabilities, and continuous improvement.

School districts should work to support the instruction received by school leaders by providing ongoing professional development opportunities in the format of cohorts. School leaders should also seek professional learning opportunities to better understand students' disability categories and support effective related instructional strategies. These cohorts should be strategically designed to support the school leader through understanding special education law and implementing the law into practice within the school building. Furthermore, the district should ensure that professionals are positioned to directly support school leaders on special education law and strengthen instructional programs for students with disabilities. By employing experts in special education, school leaders will not rely on the internet or other sources but receive expert collaboration. Overall, every staff member should be provided opportunities to learn more about the current trends in special education to create an inclusive school culture that aligns with current legal standards.

Theoretical and Empirical Implications

The theoretical frameworks that supported this study were Knowles's (2015) adult learning theory and Mezirow's (1995) transformative learning theory. The findings from the study have theoretical and empirical implications that are supported by the relevant literature. The new knowledge attained from the participants' experiences guided the study's implications.

Theoretical Implications

Knowles's (2015) adult learning theory with its six assumptions informed the study's theoretical implications by focusing on the characteristic of adult learners to move forward to seek new knowledge. All 10 participants noted a desire to learn more about leading inclusive and special education based on their experiences and reflections on navigating the role. Adult learning needs to change in each developmental stage (McCauley et al., 2017). Recognizing the adult learners' needs within their role is valuable because it allows a proactive approach to determine what kind of curriculum, professional development, and training will be most effective as school leaders navigate their journey. Mezirow's (1995) transformative learning theory grounded the study's findings on how school leaders develop frames of reference through their experiences that challenge their perspectives as they make decisions that impact student outcomes. Several participants observed that policies, procedures, and initiatives are changing. Hence, as school leaders shared their experiences, Mezirow's (1995) transformative learning theory revealed how adult learners make sense of their experiences and change the meaning of newly acquired knowledge. Phillip stated, "You learn about it in school, but it's very different when you're in the real moment." Based on participant responses shared in Chapter 4, participants consistently referred to the need to stay current on the trends; all of them reported collaborating with others to acquire knowledge and using the expertise of others to translate that knowledge into their decision making. The findings from this study show the viability of the two theoretical frameworks in exploring the perspectives of school leaders in special education. School leaders are continuously improving in their roles using the expertise and feedback from their colleagues, which motivates a critical self-reflection process that informs their future decision making.

Empirical Implications

School leaders report a lack of experience leading inclusive and special education programs (Templeton, 2017). School leaders lack knowledge competencies regarding special and inclusive education programs (Fullan, 2016; McLeskey, 2019; Templeton, 2017). Existing research indicates that the active involvement of principals or school leaders is critical to school improvement initiatives (Boscardin, 2020; Miller, 2018; Strong, 2019; Templeton, 2017). However, there was a gap in empirical evidence related to special education administrators' preparation and development (Bateman et al., 2017; Crockett et al., 2009; Templeton, 2017). Since schools serve an inclusive student population, these administrators' preparation and development are essential to improving student outcomes. The participants' collective responses in this study were consistent findings reported in the literature that school leaders lacked coursework outside of a school law course and have minimal direct experience working with students with disabilities within their training programs. Rinehart (2017) expressed the importance of experiential learning and how it can impact leaders' decisions to enhance the experiences of students with disabilities and their families in the school community. This study revealed that school leaders found that on-the-job learning was a prevalent factor in learning more about their role and how to navigate special education processes. The theoretical framework of this study incorporated Knowles's six assumptions, which solidified the study's finding that the best practices in adult learning use elevated levels of involvement in planning, experiential learning, relevance, and practical application (Knowles, 1984). Several participants indicated that their preparatory programs lacked practical knowledge or the tools needed to immediately implement leadership practices targeted to inclusive and special education practices. The literature indicated that principals, although they serve as the instructional leaders for all

students, lack the coursework and field experience needed to create an appropriate environment for students with disabilities (Bateman et al., 2017; Rinehart, 2017). Participants relied on their previous experiences in the classroom to support teachers in leading specialized instruction for students with disabilities. However, there was no mention of formal training in direct instruction of students with disabilities or providing levels of interventions to support teachers in improving student outcomes for all learners. Participants did not address their level of training for providing and supporting specially designed instruction. Still, they indicated they felt confident in teaching because of their previous teaching experiences, regardless of whether it was targeted at students with disabilities. Empirical evidence was limited to school leaders' accessing targeted experiential learning to address special education processes and improving specially designed instruction for students with disabilities (Rinehart, 2017; Templeton, 2017).

Limitations and Delimitations

The limitations in this study are defined methods of the study that could not be controlled but influenced the outcome of the research study. The delimitations of this study were controlled decisions of what to include or not include based on relevance to the study. One limitation in this study that could not be controlled was that the COVID-19 pandemic caused several school districts to limit the participation of school leaders, specifically principals, resulting in a decreased number of participants.

The delimitations for this study include the criteria for participants to be endorsed in administration and supervision K–12 because a Virginia requirement implies that all participants have experienced leadership coursework or a preparation program before being in their leadership role. It was important to include leaders who had experienced a leadership program and were deemed qualified to lead inclusive and special education programs. Virtual data was

collected to make the research study more manageable and accessible for all participants. In-person interviews were excluded from the study. Instead, all data was collected virtually instead of face to face.

Further delimitations include the transcendental phenomenology approach using Moustakas's (1994) approach to arrive at a new meaning to help eliminate any previous bias about the phenomenon, the research questions, and site locations. Results from this study are specific to school leaders in Central Virginia who are responsible for leading inclusive and special education programs. Based on the study's intent, the research questions, participant journals, and focus group questions were aligned to elicit opportunities for the participants to provide a detailed description of their reflective experiences, creating themes that represented school leaders' shared collective experiences.

Recommendations for Future Research

This section considers the study findings, limitations, and delimitations resulting in recommendations for future research. The study results indicated that school leaders lack special education coursework in their leadership preparation programs and have limited experiences with inclusive and special education programming before beginning the role. They circumvent the lack of knowledge by reaching out to other professionals and rely on team efforts to make decisions and enhance student outcomes. Participants seek practical knowledge from professional development to inform their practices in their daily tasks. However, such opportunities are either limited or unavailable, leading several school leaders to rely on their colleagues.

A transcendental phenomenological study was conducted to arrive at the essence of school leaders' experiences to provide new knowledge on their experiences as they navigated

their day. This research indicates that the state should reassess current preparation programs and examine principal preparation programs, including coursework and aligned field experiences that educate candidates about IDEA, state laws, and regulations on special education and inclusive schools. School leaders need practical knowledge of the IEP process, special education identification, referrals, due process, mediation, least restrictive environment, discipline strategies, and behavior management. Additionally, a quantitative study is recommended to examine general and special education teachers' perceptions of school leaders' ability to create and sustain inclusive and special education programs.

Future studies might also examine who school leaders seek knowledge from and if they are deemed experts within inclusive and special education programs. Mezirow's (1995) framework also explores creating autonomous thinking that can be impacted if the school leader does not have the required content knowledge to make informed decisions. This investigation could be completed as a case study for multiple school leaders responsible for inclusive and special education programs.

Conclusion

This transcendental phenomenological study was developed to understand the experiences of school leaders leading inclusive and special education programs. An extensive leadership review revealed a lack in the literature of empirical evidence about special education administrators' preparation and development, and specifically how adults learn and transform knowledge related to leading inclusive and special education programs in their schools (Bateman et al., 2017; Crockett et al., 2009; Templeton, 2017; Yacek, 2022). Using Mezirow's (1995) transformative learning theory and Knowles's (2015) adult learning theory, the study explored the collective experiences of 10 participants through in-depth semi-structured interviews,

participant journals, and a focus group. The data was analyzed using Moustakas's (1994) six steps and a thematic analysis applying horizontalization to discover themes related to collective experiences. The four major themes (leadership experiences, leadership style, leadership preparation for inclusive and special education, learning leadership, and inclusive school culture) became apparent.

The primary findings of this investigation are that school leaders lack special education coursework within their preparation programs and rely on collaboration with their colleagues to make decisions related to leading inclusive and special programs. The essential takeaway is that professional development must be embedded, emphasizing the intentionality of pairing school leaders with an ongoing collaborative team. The participants in the study all shared that there is a lack of practical knowledge that translates into action in their roles, resulting in a heavy reliance on interdisciplinary teams. Increasing school leaders' confidence and expertise in leading inclusive and special education programs is vital to student success and an inclusive school environment.

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APPENDICES

Appendix A: Institutional Review Board Approval

LIBERTY UNIVERSITY

INSTITUTIONAL REVIEW BOARD

September 23, 2021

April Martin
Tony Ryff

Re: IRB Exemption - IRB-FY21-22-83 A Phenomenological Study of the Experiences of School Leaders' Preparation and Leadership of Inclusive and Special Education Programs

Dear April Martin, Tony Ryff,

The Liberty University Institutional Review Board (IRB) has reviewed your application in accordance with the Office for Human Research Protections (OHRP) and Food and Drug Administration (FDA) regulations and finds your study to be exempt from further IRB review. This means you may begin your research with the data safeguarding methods mentioned in your approved application, and no further IRB oversight is required.

Your study falls under the following exemption category, which identifies specific situations in which human participants research is exempt from the policy set forth in 45 CFR 46:104(d):

Category 2.(iii). Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording) if at least one of the following criteria is met:

The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by §46.111(a)(7).

Your stamped consent form(s) and final versions of your study documents can be found under the Attachments tab within the Submission Details section of your study on Cayuse IRB. Your stamped consent form(s) should be copied and used to gain the consent of your research participants. If you plan to provide your consent information electronically, the contents of the attached consent document(s) should be made available without alteration.

Please note that this exemption only applies to your current research application, and any modifications to your protocol must be reported to the Liberty University IRB for verification of continued exemption status. You may report these changes by completing a modification submission through your Cayuse IRB account.

If you have any questions about this exemption or need assistance in determining whether possible modifications to your protocol would change your exemption status, please email us at irb@liberty.edu.

Sincerely,

G. Michele Baker, MA, CIP

Administrative Chair of Institutional Research

Research Ethics Office

Appendix B: Recruitment Letter and Consent Form

Date: _____

Dear Administrator:

As a graduate student in the School of Education at Liberty University, I am conducting research as part of the requirements for a Philosophy of Education Doctorate in Higher Administration. The purpose of my research is to explore the lived experiences of school administrators who lead inclusive and special education programs to better understand leadership practices and improve student outcomes, and I am writing to invite you participate in my study.

If you are a public school administrator who completed an administration and supervision endorsement K–12, and you supervise a special education program, and are willing to participate, you will be asked to journal your special education experiences for two weeks by writing a minimum of four journal entries, participate in an interview, and participate in one focus group session. Focus group sessions are scheduled for _____ at _____. Additionally, you will be asked to review the transcript of your interview and provide any corrections to me. It should take approximately three and a half hours total for you to complete the procedures listed. Your name and/or other identifying information will be collected as part of your participation, but this information will remain confidential.

To participate, click on the link provided and complete the screening survey.

If you meet the criteria for the study based on your screening survey responses and are selected to participate, a consent document will be attached to your acceptance email (emailed) via the digital signature tool DocuSign™. The consent document contains additional information about my research, please electronically sign the consent document. Once I receive your signed consent document, you will receive your electronic journal, and I will contact you to set up your interview.

Sincerely,
April Burwell, Educational Specialist
Doctoral Candidate. Liberty University

Appendix C: Participation Consent

Consent

Title of the Project: A Phenomenological Study of the Experiences of School Leaders' Preparation and Leadership of Inclusive and Special Education Programs
Principal Investigator: April Burwell, Doctoral Candidate, Liberty University

Invitation to be Part of a Research Study

You are invited to participate in a research study. To participate, you must be endorsed in K–12 administration and supervision, be school leaders responsible for leading inclusive and special education programs and be working in a public school setting. Taking part in this research project is voluntary.

Please take time to read this entire form and ask questions before deciding whether to take part in this research.

What is the study about, and why is it being done?

The purpose of the study is to explore the lived experiences of school administrators who lead inclusive and special education programs to understand leadership practices better and improve student outcomes.

What will happen if you take part in this study?

If you agree to be in this study, I will ask you to do the following things:

1. **Participant Journals** The participants will receive an electronic journal by email using Google Docs with guiding prompts and have one week to complete it. Participants will be asked to journal their inclusive and special education leadership experiences for one week by writing a minimum of two journal entries. Each participant will be responsible for documenting their reflective thoughts and three to five experiences in a paragraph format, each involving an area that positively or negatively affected their daily practice of leading inclusive and special education programs. Participants will receive electronic reminders on day one and three. I will send an email to serve as a reminder of the journaling process. Participants can take as much time as needed to complete the minimum writing requirement.
2. **Interviews** The interview protocol will consist of 21 open-ended questions. The interviews will occur in a virtual setting. There will be two recording devices, a voice memo recorder on an iPhone and via Zoom or Google Meet, which will later be transcribed using the NVivo software. The interview will last approximately 60 minutes. Before the interview, the researcher will ask via email whether the Zoom or Google Meet call will be recorded with the camera on or off. The interviewee will determine whether

they will be recorded with or without the video camera. The researcher will send the participant calendar invites with a link to join.

3. **Focus Group** The focus groups will consist of school leaders with zero to five years of experience and school leaders with six or more years of experience. The focus groups will be on Zoom in an uninterrupted private space for the participant. The focus groups will be recorded, and the participants can determine whether they will have their camera on or off. The focus group will last for approximately 60 minutes.

How could you or others benefit from this study?

Participants should not expect to receive a direct benefit from taking part in this study.

Benefits to society include increased leadership practices for inclusive and special education resulting in well-prepared students creating productive citizens.

What risks might you experience from being in this study?

The risks involved in this study are minimal, which means they are equal to the risks you would encounter in everyday life.

How will personal information be protected?

The records of this study will be kept private. Published reports will not include any information that will make it possible to identify a subject. Research records will be stored securely, and only the researcher will have access to the records.

- Participant responses will be kept confidential through the use of pseudonyms. Interviews will be conducted in a location where others will not easily overhear the conversation, and the researcher will wear headphones during the virtual interview.
- Data will be stored on a password-locked computer. After three years, all electronic records will be deleted.
- Interviews and focus groups will be recorded and transcribed. Recordings and the participant journal will be stored on a password locked computer for three years and then erased. Only the researcher will have access to these recordings.
- Confidentiality cannot be guaranteed in focus group settings. While discouraged, other members of the focus group may share what was discussed with persons outside of the group.

Is study participation voluntary?

Participation in this study is voluntary. Your decision whether or not to participate will not affect your current or future relations with Liberty University. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

What should you do if you decide to withdraw from the study?

If you choose to withdraw from the study, please contact the researcher at the email address/phone number included in the next paragraph. Should you choose to withdraw, data collected from you, apart from focus group data, will be destroyed immediately and will not be included in this study. Focus group data will not be destroyed, but your contributions to the focus group will not be included in the study if you choose to withdraw.

Whom do you contact if you have questions or concerns about the study?

The researcher conducting this study is April Burwell. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact her at [REDACTED]. You may also contact the researcher's faculty sponsor, Tony Ryff, at [REDACTED].

Whom do you contact if you have questions about your rights as a research participant?

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, **you are encouraged** to contact the Institutional Review Board, 1971 University Blvd., [REDACTED].

Disclaimer: The Institutional Review Board (IRB) is tasked with ensuring that human subjects research will be conducted in an ethical manner as defined and required by federal regulations. The topics covered and viewpoints expressed or alluded to by student and faculty researchers are those of the researchers and do not necessarily reflect the official policies or positions of Liberty University.

Your Consent

By signing this document, you are agreeing to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.

The researcher has my permission to audio-record/video-record me as part of my participation in this study.

Printed Subject Name

Signature & Date

Appendix D: Reflective Journal

Date	Notes:
6/17/2021	Today, I received approval from one school district to work with their school leaders. I uploaded the letter into the manuscript. I am unsure if this will stay in the final manuscript as it identifies information. However, I am pleased to have this approval as it is one of the largest diverse districts in Virginia.
1/26/2022	Today, I received site approval for one district, and now I have approval from two districts. However, I feel frustrated with the delays in approval and am concerned about what this may mean for me to reach saturation. I prefer the study to come from three different districts in Central Virginia.
1/31/2022	Today, the pilot study was conducted with two volunteers that have experience in education and are certified in admin K–12. During the investigation, I found that one of the questions about ethical and norm challenges caused some hesitation. Therefore, I was provided examples of what I meant by stating concepts and not leading questions. This helped me determine how I may need to approach this question with other participants and have examples ready. During the pilot study, I realized that it would be best for the participants to complete the journal after the interview to understand the study better and feel more comfortable because they had more background information. The feedback received was that the interview questions for both the individual interview and focus group led to an organic conversation. Although some overlapped, it led to a different thought or response to delve deeper, which caused the interviewee to provide scenarios.
2/1/2022	After receiving approval from two sites, I decided to begin looking for participants and not wait for the approval of the third district. I changed my school districts based on some sites not approving it due to not wanting to ask principals or assistant principals to start another initiative because of the impact of COVID-19. One site gave partial approval but wanted me to remove the focus group. Today, I used the school's directory and sent out emails to 30 potential participants using the recruitment letter and screening tool.
3/9/2022	Two participants completed their online screening tool and consent forms on DocuSign and were contacted to schedule an interview; their interviews were conducted on 3/14/2022. I was very flexible with the participants on the interview dates. I know how busy they are and appreciative of their participation.
3/10/2022	Two participants completed their online screening tool and consent forms and were contacted to schedule their interviews on 3/21/2022.
3/11/2022	One participant completed their online screening tool and consent form and was contacted to complete their interview on 3/21/2022.
3/12/2022	One participant returned their documents, and their interview was scheduled for the same day. I conducted the interview and explained the next steps. The interview was transcribed directly after the interview and shared with the participant for member-checking.
3/14/2022	Two participants provided their signed consent through DocuSign, and their interviews were scheduled for 3/16/2022.
3/15/2022	The participant provided consent and was contacted for an interview on 3/21/2022.

3/23/2022	The participant provided consent, and their interview was scheduled for 3/30/2022.
3/24/2022	Two participants provided consent, but no interview was scheduled. The participants had different matters that came up and could no longer commit to the study; I wanted to have 12 participants, but because of this change, I will have 10 participants.
3/20/2022	Today, I sent out an email reminding the participants who did not complete at least two journal entries to complete their journal entries. This has been a challenge for some of the participants. I provided extensions for everyone to complete the participant journal no later than March 28, 2022. Each day I monitored the journal entries to see the participant's progress and made notes of interesting responses.
4/6/2022	I started the 14-day trial of NVivo because I had completed all the individual interviews and because by March 28, 2022, I had all the journal entries. I wanted to ensure that all the raw data was in more than one place. I had the data in Google files and all the videos and transcriptions. I also uploaded all the data into NVivo, including the audios of the interviews. From there, I began to compile my notes. I went through individual statements and started grouping them using NVivo by highlighting direct quotes. After matching the video or audio, I also made any adjustments to the transcript. I couldn't generate themes until I had all the data.
4/11/2022	Participants were provided dates for a focus group using Signup Genius. The participants responded and were selected on 4/18/2022. Each participant was provided a calendar invite with a Zoom link; I used the feature that blocked guest names to ensure confidentiality on the calendar invite.
4/17/2022	I sent an email to all participants reminding them of the focus group session scheduled for 4/18/2022. One participant had a family emergency and told me they would not be able to participate.
4/18/2022	The focus group was completed. Three participants did not attend for various reasons. The focus group session was organic, with six participants recorded, and participants seemed very excited to share their experiences. At the end of the focus group, one participant laughed and said, "At least we can all say that we go through the same things, and I feel better knowing that I am not alone." I was happy to hear that, and the feedback I received about how this study was essential and should be explored made me feel encouraged. I was grateful for their participation and actively had to make sure that I did not insert my opinions, thoughts, or feedback because I wanted to arrive at new ideas based on their experiences.
4/19/2022	All the raw data had been collected, so I began to go back and review the statements that I had already started coding based on the individual interviews and the participant journals. I coded each response from the focus group. I had 50 individual codes, which was a bit overwhelming. Still, as I began to go back and look at the individual interviews to see if these statements would fall into a category or theme, I eliminated statements that were not consistent or did not match. I had to repeat this step for each interview. The first round of codes was

	exported from NVivo, and it shared the files (data sources) used and how often that code was referenced.
4/20/2022	I continued the coding process with a fresh outlook. I also cut out sentences and statements to manipulate the data and use NVivo. I wanted to know my data, so I did the process manually first and then mirrored it in NVivo. I ended up purchasing NVivo. Using NVivo, I exported my second round of codes to see if the codes could fall under different categories. For example, the first “theme” I had was Acquiring More Knowledge, which had 22 references. Still, as I continued to read through the data and code statements, I found that those codes would better fit under the major theme of Leadership Preparation.
4/22/2022	Themes began to emerge, and I was able to place statements within those categories using NVivo. I saw how frequently these statements occurred, which helped determine what category to identify the statements under. Five themes emerged. I had to focus on what was said and revisit the videos to note any gestures or anything that I might not have noticed.

Appendix E: Memoing Process

Theme	Frequency of Themes	Evidence
Inclusive School Culture Barriers Values	19	<p>“One of the biggest struggles is staff that is unwilling to be inclusive. So we do have several staff members that feel that if a student has an IEP, they need to be fully self-contained and should not be in Gen Ed, basically ever. So we do a lot of explaining and kind of baby steps to get those kids where they need to be and then we also look for teachers that are more willing to practice the inclusion and have those kids have those opportunities because it's not going to be successful if the gen ed staff is not on board. So we want to make sure those kids are fully supported, which also brings the struggle of staffing, because we don't always have the staff that we need for true inclusive opportunities.” (Participant, Interview)</p> <p>“Being a leader of inclusive and special education programs often means putting personal feelings aside and staying focused on ethical, and legal, obligations.” (Participant Interview)</p> <p>“Morals, ethics and human emotions can all be very powerful, and sometimes opposing, forces in leading inclusive and special education program” (Participant Interview)</p> <p>“And I feel that all students deserve kind of the best and so inclusion requires that that you have to think of that big picture.” (Participant Interview)</p>
Leadership Experiences Collaboration	22	<p>“I think one of the struggles that carry is the new staff and the turnover. So that's been challenging to ensure that we have highly qualified professionals to facilitate those processes and special education programs. But everyone is so new, and so it's like a lot of figuring it out together, if that makes sense. And then just essentially being resourceful and knowing who to ask and when to ask for support” (Participant Interview).</p> <p>“You take one course it's the legal the legal aspects course you don't have to have all this experience. So I think we are now facing leaders who are coming into the job impaired, and then also trying to then train new specialist teachers who don't know much more than just the legal aspects of it” (Participant Interview).</p> <p>“Interventions that needs to happen before a student is referred to or recommended to special education. They don't seem to get that. Okay, the student is struggling Okay. Well, what have you done to help them?”</p>

		<p>So that part of it they, they seem to miss sometimes” (Participant Interview).</p> <p>“it's just making sure that we find ways to make sure that all of our kids are making growth and progress in the best way. That's for them, their instructional needs, and making sure you know, their that their parents have a good understanding of it, that, you know, everyone has a school that they feel included” (Particiapnt Interview).</p>
<p>Leadership Preparation</p> <p>Identifying Learning Gaps</p>	25	<p>“I didn't know that as an administrator that for the eligibility that I can decide whether they the final say so whether we need to move forward with any type of evaluation. I didn't find that out to this school year” (Participant Interview).</p> <p>“You know, I will take advantage of the district wide PDS” (Participant Interview).</p> <p>“I wish I knew more about the process. The IEP process and eligibility process” (Focus Group).</p> <p>“You take one course it's the legal the legal aspects course you don't have to have all this experience. So, I think we are now facing leaders who are coming into the job impaired, and then also trying to then train new specialist teachers who don't know much more than just the legal aspects of it”. (Participant Interview)</p>
<p>Leadership Style</p> <p>Self-Awareness</p>	15	<p>“I am reflective and I'm self aware of what my strengths and weaknesses are”. (Participant Interview).</p> <p>“I have questions all the time still, because I feel like I'm still developing my leadership style. I'm still relatively new with this. So I'm constantly looking for ways that we could maybe streamline a process or make things easier for the families and the students. That self reflection really not so much any specific questions. It depends on the situation. But constantly asking, What can I do better?” (Participant Interview)</p> <p>“So I would say my style of leadership is very personable”(Focus Group)</p>
<p>Learning Leadership</p> <p>Experiential learning</p>	20	<p>I feel like you read about it, you learn about it in school, but then when you're in the in the real moment, it's very different. And you know, he you have to really truly take these two differently. I think a lot of it just comes from a lot of my learning for special education. Inclusion comes with just listening and talking to people and talking to special education</p>

		<p>teachers or talking to other school leaders and how they handle certain situations (Participant Interview)</p> <p>“I have come across so many scenarios that I did not really have the knowledge of, and how to handle and how to deal with those situations. So working closely with our specialists working closely with our principal in the past, working closely with our Dean of special education, to just kind of helped me maneuver through the areas where I wasn't really sure” (Participant Interview)</p> <p>“I think such a big part about it because trying to help people feel comfortable with what's happening or when your student gets identified as special education like helping people through that process, I think is such a kind important part of taking your learning into action.” (Participant Interview)</p>
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Appendix F: Electronic Journal Template

Participant Pseudonym: _____

Electronic Journal Instructions: Please journal your experiences related to leading inclusive and special education programs over the next two weeks. Journal a minimum of four times over the course of the two-week period. Guiding prompts are provided as a suggestion. However, you may include additional details or information. Please date each entry and write one to five paragraphs with a 100-word minimum.

Guiding Prompt:

- How did your prior experiences assist you in organizing your workday?
- Reflect on any moral or ethical norms that were involved in leading inclusive and special education programs.
- What opportunities did you have this week to problem solve using a new way of thinking?
- How do you maximize collaborative opportunities?
- What other thoughts do you have regarding your leadership of inclusive and special education programs?

Date:

Entry:

Date:

Entry:

Date:

Entry:

Appendix G: Email Reminder

Dear Participant:

Thank you for participating in the research study. This email serves as a reminder that we are in the participation portion of the study. Please use the guiding prompts to journal your experiences related to leading inclusive and special education. Remember, you may add additional details and information related to your experiences of leading inclusive and special education. If you have any questions or concerns, please use the contact information listed below.

Sincerely,

April Burwell

Dear Participant:

Thank you for participating in the research study. This email serves as a reminder that we are in the participation portion of the study. Please use the guiding prompts to journal your experiences related to leading inclusive and special education. Remember, you may add additional details and information related to your experiences of leading inclusive and special education. If you have any questions or concerns, please use the contact information listed below.

Sincerely,

April Burwell

Appendix H: Interview Questions

Today's Date:

Place:

Time:

Interviewee #:

Steps:

1. Ask the participant whether he/she permits the student researcher to record the interview.
2. Once the participant has agreed to allow the student researcher to record, the student researcher will turn on the recording device.
3. Introduction to the Research Study:
 - a. Interviewer/ Interview Introductions
 - b. The student researcher will explain the length of the interview
 - c. The student researcher will explain the purpose of the study and the rationale for the data being collected.
 - d. The student researcher will explain the precautions to be taken to protect the confidentiality of the participant and how the student researcher will protect the data collection.

Standardized Open-Ended Interview Questions

1. Tell me about your experiences in education before becoming an inclusive and special education school leader.
2. What motivated you to become a leader of inclusive and special education?

3. How did your previous experiences inform your role of leading inclusive and special education?
4. Describe how you assume ownership of your learning as it relates to leadership, special education, and inclusive education programs.
5. Based on your experiences, what would you have liked to know more about regarding leading inclusive and special education?
6. Describe your experiences in your current role participating in professional learning opportunities.
7. Describe your role in leading inclusive and special education in your building.
8. What motivates you to learn more about inclusive and special education?
9. How do you share your vision for inclusive and special education to influence the staff's holistic approach to inclusive and special education?
10. How do you feel about your ability to support collaborative instruction between special education and collaborative teachers?
11. How do you know whether you are meeting students' and staff's needs when leading inclusive and special programs?
12. How do you describe your values and beliefs of leading inclusive and special education?
13. How do you describe your professional critical self-reflection process?
14. What questions, if any, came up for you as you further developed your leadership style?
15. Tell me about the struggles you have experienced in implementing inclusive and special education in your building.
16. What satisfaction have you gained, or what frustrations do you have regarding inclusive and special education?

17. How do you solve problems and respond to frustrations related to leading inclusive and special education programs?
18. Describe how you handle moral and ethical norm challenges in your daily workday?
19. What is the most important thing for school leaders to know about leading inclusive and special education?
20. What, if anything, do you wish had been included in your leadership program or professional development opportunities regarding inclusive and special education?
21. What else would you like to share?

Appendix I: Focus Group Questions

Today's Date:

Place:

Time:

Interviewee #:

Steps:

1. Ask the focus group whether he/she permits the student researcher to record and videotape the interview.
2. Once the participant has agreed to allow the student researcher to record, the student researcher will turn on the recording and videotaping device.
3. Introduction to the Research Study:
 - a. Interviewer/ Interview Introductions
 - b. The student researcher will explain the length of the interview
 - c. The student researcher will explain the purpose of the study and the rationale for the data being collected.

The student researcher will explain the precautions to be taken to protect the confidentiality of the participant and how the student researcher will protect the data collection.

Standardized Open-Ended Focus Group Questions

1. Please introduce yourself to the group by describing your Virginia licensure and endorsements, higher education degrees, job title, and the number of years that you have been a leader of inclusive and special education programs.
2. What prior experience has been the most useful to you in your role of leading inclusive and special education programs?

3. What do you wish you had known more about before assuming your current role of leading inclusive and special education programs?
4. What recommendations do you have for professional learning opportunities for leading inclusive and special education programs?
5. Describe how your leadership style has made a difference in your school building.
6. How do you approach moral and ethical norm challenges relative to inclusive and special education programs?
7. How are you supported when navigating differences between moral and ethical norm challenges at work?
8. Describe how you know when you need an additional level of support and explain your support options.
9. Describe the most important requirement that should be included in administrator preparation programs relative to leading inclusive and special education programs.
10. What else that would you like to share with the group?

Appendix J: Audit Trail

Date	Action
7/15/2020	Dissertation chair approved
6/17/2021	Received first site approval
7/16/2021	Manuscript accepted
7/24/2021	Proposal defense passed
9/23/2021	IRB passed
1/26/2022	Received second site approval
1/31/2022	Completed pilot study
1/31/2022	Created a protected files and a Google Drive to house all the documents
2/1/2022	Began recruiting participants
2/5/2022	Sent out 30 research participant requests; the participant email addresses were found on the websites
2/5/2022	Created individual Google folders for 10 participants with the following documents consent, interview questions, journal template, and directions
2/17/2022	Received site consent from third location.
3/9/2022	Received consent forms from two participants and scheduled interviews.
3/10/2022	Received consent forms from two participants scheduled their interviews on 3/21/2022.
3/11/2022	One participant completed their online screening tool and consent form and was contacted to complete their interview on 3/21/2022.
3/12/2022	One participant returned their documents, and their interview was scheduled for the same day.
3/14/2022	Two participants provided their signed consent through DocuSign, and their interviews were scheduled for 3/16/2022.
3/15/2022	The participant provided consent and was contacted for an interview on 3/21/2022.
3/23/2022	The participant provided consent, and their interview was scheduled for 3/30/2022.
3/24/2022	Two participants provided consent, but no interview was scheduled. The participants had different matters that came up and could no longer commit to the study.
3/20/2022	Sent email to remind participants to journal
4/6/2022	Imported raw data into NVivo.
4/11/2022	Participants were provided dates for a focus group using Signup Genius. The participants responded and were selected on 4/18/2022. Each participant was provided a calendar invite with a Zoom link; I used the feature that blocked guest names to ensure confidentiality on the calendar invite.
4/17/2022	Scheduled focus group interview
4/18/2022	Completed focus group and member checking
4/19/2022	Review of data
4/20/2022	Review of data
4/22/2022	Review of data

Appendix K: Consent to Conduct Research Letter

Dear School District,

I am writing to request approval contingent upon proper IRB approval to conduct a research study at your institution. I am currently enrolled in the School of Education at Liberty University in Lynchburg, VA. I am in the process of defending my proposal as a partial requirement for fulfilling my dissertation. The study is entitled: *A Phenomenological Study of the Experiences of School Leaders' Preparation and Implementation of Inclusive and Special Education programs.*

To fulfill Liberty University's requirement, before defending my proposal, I must receive conditional permission to complete the study at your institution and then move forward with the IRB process. No research or information will be collected until I have received approval from the IRB.

I hope that the school district will allow me to recruit five qualifying school administrators to anonymously complete an interview, focus group, and a participant journal (copies enclosed). Interested school administrators, who volunteer to participate, will be given a consent form (copy enclosed) to be returned to the primary researcher at the beginning of the interview process.

If IRB and the districts' approval is granted, school leaders that meet the following criteria: (a) school leaders who completed an administration and supervision endorsement K–12; (b) school leaders who have a master's in teaching special education; (c) school leaders who have a current Virginia teaching license; (d) school leaders with five or fewer years of experience in supervising inclusive and special education programs will complete a participant journal for two weeks. Afterward, the participants will participate in a one-hour interview in a mutually agreed upon setting and complete one focus group session. The data collected will be interpreted to inform the research, and individual results of this study will remain confidential and anonymous.

Your conditional approval upon full IRB approval to conduct this study will be greatly appreciated. I will follow up with a telephone call next week and would be happy to answer any questions or concerns that you may have at that time. You may contact me at my email address: [REDACTED]

If you agree, kindly submit a signed letter of permission on your institution's letterhead acknowledging your conditional consent upon IRB approval for me to use school leaders employed in your district.

Sincerely,
April Burwell
Liberty University
Enclosures