

**National Study of Special Education Spending Foundational  
Phase  
Cognitive Interviews**

**Attachment 2—Interview Protocols**

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**National Center for Education Evaluation and Regional Assistance (NCEE)**

**December 2023**

## Cognitive Interview Protocol—Special Education Teachers

|                     |  |                    |  |
|---------------------|--|--------------------|--|
| Interview ID:       |  | Date of Interview: |  |
| Teacher First Name: |  | Interviewer:       |  |
| Student First Name: |  | Round:             |  |
| Student Disability: |  |                    |  |

### STEP 1: WELCOME AND INTRODUCTION SCRIPT

**Interviewer Instructions:** The following scripts should NOT be read verbatim. Text in italics is suggested content with which the interviewer should be thoroughly familiar in advance. Text in square brackets [ ] presents interviewer instructions.

*Hello, my name is <your name> and I work for the American Institutes for Research. It's nice to meet you. Thanks for joining us today to help us out. [Confirm that they can hear and see (if applicable) you and your screen—troubleshoot if the video and/or audio are not working well.] As noted before, please make sure you are in a quiet space so you can hear us and we can hear you clearly. Interruptions are okay during this interview, but we hope to minimize them as much as possible.*

[Create small talk to build rapport]:

*You are here today to help us develop a survey on special education spending for the U.S. Department of Education. This survey will ask special education teachers, case managers, or other special education personnel about the type and amounts of general and special education services a student with a disability receives, along with assistive technology, transportation, and extended-year services that students receive.*

*For the interview today, we will ask you to think about one of your students because the survey questions ask about an individual student's services and the people and other resources it takes to provide those services. We will ask you to name this student so that we can refer to them and their services easily. If you prefer, you can use a nickname or initials as long as you can keep this specific student in mind as we talk about the survey questions.*

*It's important that you know that your responses about this student will only be used to refine and improve survey items. The survey itself will be used in a future study on special education spending. None of our study reports will use the responses you provide today, and no reports or study products will name you or your student as an individual. The study information is being collected under the confidentiality and data protection requirements of the Education Sciences Reform Act of 2002, Title I, Part E, Section 183.*

*We will audio and video record the interview so researchers can review the recording later. Again, any information that refers to you or your student, such as your name or the name of your school, will not be included in our report, and your responses will be used for survey development purposes only. Recordings will be deleted at end of the research study.*

*Do you agree to the recording?*

*(If no, that's fine. You can still participate.) Do you agree to participate?*

[WE NEED A DIVERSE POOL OF PARTICIPANTS WHO WORK WITH STUDENTS ACROSS GRADE LEVELS AND WITH DIFFERENT DISABILITIES AND STUDENTS WITHOUT DISABILITIES. TO MAKE SURE WE ARE ACHIEVING THESE SAMPLE REQUIREMENTS, THE RECRUITER WILL TAKE PARTICIPANT RESPONSES FROM THE RECRUITMENT SCREENER AND ASSIGN THE RESPONDENT TO THE CATEGORY NEEDED.]

THE INTERVIEWER SHOULD CONFIRM GRADE LEVEL AND BROAD DISABILITY CATEGORIES, THEN ASK THE PARTICIPANT TO THINK ABOUT A SPECIFIC STUDENT.]

*When you completed the screening questionnaire, you mentioned that you taught students in {Kindergarten–5; 6–8; 9–12} with {High-need disabilities; Low-need disabilities; Sensory or physical disabilities}.*

*For our conversation today, I want you to think about a specific student in {Kindergarten–5; 6–8; 9–12} with {Low-need disabilities; High-need disabilities; Sensory or physical disabilities}. Low-need disabilities are specific learning disability, speech/language impairment, other health impairment, and emotional disturbance. High-need disabilities are autism, intellectual disability, multiple disabilities, and traumatic brain injury. Sensory or physical disabilities are visual impairment, including blindness, deaf-blindness, deafness, hearing impairment, and orthopedic impairment.*

*Please tell me the first name, nickname, or initials of a student with a {high-need/low-need/sensory or physical} disability.*

*[RECORD NAME OF STUDENT, STUDENT NICKNAME, OR INITIALS]*

*What is {STUDENT'S FIRST NAME}'s current grade, grade equivalent, or year of school?*

*Kindergarten*

*1<sup>st</sup> grade*

*2<sup>nd</sup> grade*

*3<sup>rd</sup> grade*

*4<sup>th</sup> grade*

*5<sup>th</sup> grade*

*6<sup>th</sup> grade*

*7<sup>th</sup> grade*

*8<sup>th</sup> grade*

*9<sup>th</sup> grade*

10<sup>th</sup> grade

11<sup>th</sup> grade

12<sup>th</sup> grade

*Under what primary disability category does {STUDENT'S FIRST NAME} qualify for special education services?*

[INTERVIEWER SHOULD RECORD THE STUDENT'S PRIMARY DISABILITY CATEGORY BELOW. MARK ONLY ONE.]

*Speech or language impairments*

*Specific learning disabilities*

*Emotional disturbance*

*Intellectual disability*

*Developmental delay*

*Visual impairments (including blindness)*

*Hearing impairments (including deafness)*

*Orthopedic impairments*

*Other health impairments*

*Autism*

*Traumatic brain injury*

*Deaf-blindness*

*Multiple disabilities*

*For the first part of the interview, I will ask you to answer some questions about {STUDENT'S FIRST NAME}.*

*During the second part of the interview, we will talk about your recommendation for who is the best person or persons who can respond to the questions we asked about STUDENT NAME, and your recommendation for the types of incentives and messaging that would make completing a survey with these types of questions appealing for other special education teachers. Finally, we will discuss possible barriers to taking this survey.*

*There are no right or wrong answers, and it's okay if you do not know some of the answers. As you are answering the questions, I will ask you about your answers. This will help us make the survey questions better and clearer for future respondents.*

*Because the information you provide is so important, I am going to take notes while you answer the survey and we are talking [INSERT IF THERE IS AN OBSERVER: and my colleague will also observe our session today].*

*Remember, you are not being tested: We want you to tell us what you think about the questions on the survey.*

*If at any time you want to stop, just let me know.*

[If, for any reason, the participant is no longer interested in participating, thank the participant for their time and end the interview.]

*Before we continue, do you have any questions? [Answer any questions the participant may ask.] Okay, now to make sure we can jump in, do you have the materials that we sent to you? Do you have the survey questions open? [If not, instruct them to get those materials handy because we will be starting shortly. If they do, thank them and let them know we will be using them shortly.]*

**[If the respondent has consented to recording, start recording the video conference using the “record” option in Zoom. After this step, ask the respondent to state their consent to be recorded again so that it’s on the record.]**

## **STEP 2: THINK-ALOUD PRACTICE**

*When we begin the interview, I want you to share your screen with the Word document that we e-mailed you. This file has the survey questions that we are developing. While you read the materials, I want you to talk aloud about what you are thinking. Hearing what is going on in your head will help me understand how to make the questions better. To help you get started on thinking aloud, we are going to do a practice activity. Here is an example.*

*On the screen, there is a question. I would like you to read the question out loud and think aloud as you decide on your answer.*

**[Share your screen with the respondent for the think-aloud practice.** If you are not able to share your screen, please read the question out loud to the participant and have them think out loud.]

*How many glasses of water did you drink yesterday?*

Probe as needed for detail: ***How did you arrive at that answer? What were you visualizing when you were deciding on that answer? Can you tell me more about what you are including in your count?***

When complete: ***Thank you; that’s the kind of detail I’m looking for when you talk to me about the questions.***

**[INSTRUCT THE PARTICIPANT TO SHARE THEIR SCREEN WITH THE WORD DOCUMENTS SHARED WITH THEM PREVIOUSLY. (IF NEEDED, SHOW THE PARTICIPANT HOW TO SHARE THEIR SCREEN.) OPEN THE WORD FILE WITH SURVEY QUESTIONS AND CALENDAR.]**

## **STEP 3: COMPLETING SURVEY QUESTIONS AND IDENTIFYING BEST RESPONDENTS**

*Now I would like you to complete the survey questions. Think about {STUDENT'S FIRST NAME} as you answer the questions.*

*I'd like you to think aloud while you decide on your answer. Please read aloud the questions and anything you would have read to yourself as if I were not here.*

*Remember that I am very interested in hearing you talk about what you are thinking as you figure out your answers to the questions.*

*As you are answering the questions, I am particularly interested in three aspects:*

- 1. Sections, or specific questions, that a different person should complete. This could be a person in your school, such as a guidance counselor, the student's case manager, or someone else in the school, local education agency, or district.*
- 2. Sections, or specific questions, for which you are the best reporter, but the questions are burdensome to answer. This could be because the information required to answer the question is not easily accessible or some other reason. I would like your feedback on how you would answer these questions and how these questions may be improved.*
- 3. Sections, or specific questions, for which you are the best reporter, but you are unsure of what a term or phrase means. This could be because the questions use confusing or outdated language.*

*We will stop at the end of each section to discuss these aspects more.*

*Remember to say your answer out loud, and I will record your response.*

**[MAKE SURE THAT THE PARTICIPANT IS SHARING THEIR SCREEN. THE INTERVIEWER AND NOTETAKER SHOULD MAKE SURE THAT THE PARTICIPANT SAYS THEIR ANSWER ALOUD AND THAT THE ANSWER IS RECORDED.]**

**REMEMBER TO TELL THE PARTICIPANT THROUGHOUT THE QUESTIONNAIRE THAT THEY ARE DOING A GREAT JOB THINKING ALOUD AND THAT THEIR ANSWERS TO YOUR QUESTIONS ARE REALLY HELPFUL. ALSO, MAKE SURE THAT YOU FOLLOW ALONG AND KEEP A QUESTIONNAIRE WITH YOU SO YOU CAN MARK THEIR ANSWERS TO BE ABLE TO FOLLOW UP ON AN ITEM IF NEEDED.]**

**Useful Probes—Use only as needed when response is unclear or respondent appears confused or unsure.**

Can you tell me in your own words what that question was asking?

What does the word [term] in this question mean to you?

How easy or difficult is it to remember [topic]?

How easy or difficult was it to choose an answer?

Tell me what you are thinking?

How did you come up with that answer?

Did you look at any sources, such as a calendar, a list, or notes? Tell me about those. What do you record in it?

How often do you look at it? How often do you update it?

You said [answer]. Can you tell me more about that?

**[If you pick up on a visual cue, such as a furrowed brow or a puzzled look:]** “Tell me what you are thinking.”

**[If you pick up on a visual cue (or hear a cue) that indicates confusion, such as paper flipping or rereading an old question before answering this question:]** “Tell me about what you were just doing.”

**[THE SURVEY QUESTIONS ARE DIVIDED INTO THE FOLLOWING SECTIONS. AT THE END OF EACH SECTION, ASK THE FOLLOWING PROBES THAT ARE IN THE COLUMNS:]**

| <b>Student Resource Survey Sections</b>                                   | 1. How well are you able to answer the questions in this section? How hard was it to answer these questions? | 2. Could another person answer these questions? Who would that be? | 3. How sure are you of your answers in this section? | 4. Does this section include confusing or out-of-date language? | 5. What types of documents or materials would be useful in answering the questions in this section? | 6. How much do the services in this section change from week to week? (Would not apply to extended school year section). | 7. Are there any services provided that are not included in this section? |
|---------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| General Information<br>(Students With and Without Disabilities)           |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| Homebound or Hospitalized Student<br>(Students with Disabilities)         |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| Student Placed Outside District<br>(Students with Disabilities)           |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| General Education Instruction<br>(Students With and Without Disabilities) |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| English Language Services<br>(Students With and Without Disabilities)     |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| Special Education<br>(Students with Disabilities)                         |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| Community-based Training<br>(Students with Disabilities)                  |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| Transition Services for Older Youth<br>(Students with Disabilities)       |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |
| Related Services                                                          |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |                                                                                                                          |                                                                           |

|                                                                                 |  |  |  |  |  |  |  |
|---------------------------------------------------------------------------------|--|--|--|--|--|--|--|
| (Students with Disabilities)                                                    |  |  |  |  |  |  |  |
| Extended School Year<br>(Students with Disabilities)                            |  |  |  |  |  |  |  |
| Extended Time Services<br>(Students with Disabilities)                          |  |  |  |  |  |  |  |
| Specialized<br>Transportation<br>(Students with Disabilities)                   |  |  |  |  |  |  |  |
| Assistive Technology &<br>Specialized Equipment<br>(Students with Disabilities) |  |  |  |  |  |  |  |

**General Interviewer Observations Instructions:** We would like for you to keep an eye on how the participant might react or mention a phrase or word that causes confusion because he/she did not have the information to answer or struggled to recall the question. Please make notes about these issues or if the participant has any reactions to these:

- Out-of-date or confusing phrasing
- Layout of questions
- Sections/questions they cannot answer
- Better reporters for certain sections
- Documents or resources that they would need to reference

#### **STEP 4: COMPLETING THE CALENDAR EXERCISE (Round 1 Interviews Only)**

[AFTER ALL SECTIONS ARE COMPLETE, THE INTERVIEWER SHOULD MOVE TO CALENDAR EXERCISE. NOT ALL SECTIONS ARE INCLUDED IN THIS EXERCISE.]

*Now I would like to put the questionnaire aside for a moment and do something a little different. I am going to show you this calendar for the last 4 weeks, and I would like you to tell me the special and general education services provided to {STUDENT} by week during the last 4 weeks. Remember that I am very interested in hearing you talk about what you are thinking as you go through this process. If you don't know, or are not the best person to answer, that is okay. I want to know that information as well.*

*As you are thinking about the services provided, please focus on the following:*

- *Where the student receives instruction (for example, departmentalized instruction), how many hours the student receives instruction in all the settings, and who provides that instruction;*
- *Any additional services the student may receive, including direct services to the student or consultative services between adults, the number of hours the student received those services, and how many students are also receiving those services with the student; and*
- *All assistive technology that this student uses.*

Most recent month

### Services Provided

Probes, if needed, for each service:

- Where were these services provided?
- How often were these services provided?
- How much time did student receive these services on days they were provided?
- Who provided these services?
- Notes

|        |                                                              |  |
|--------|--------------------------------------------------------------|--|
| Week 1 | Students With Disabilities' Instruction and Related Services |  |
|        | Less frequent related services                               |  |
|        | Assistive technology                                         |  |
| Week 2 | Students With Disabilities' Instruction and Related Services |  |
|        | Less frequent related services                               |  |
|        | Assistive technology                                         |  |
| Week 3 | Students With Disabilities' Instruction and Related Services |  |
|        | Less frequent related services                               |  |
|        | Assistive technology                                         |  |
| Week 4 | Students With Disabilities' Instruction and Related Services |  |
|        | Less frequent related services                               |  |
|        | Assistive technology                                         |  |

**[AFTER THE PARTICIPANT HAS GONE THROUGH THE EXERCISE, ASK THE FOLLOWING PROBES:]**

*Now let's compare the calendar exercise to your survey responses. Could you walk me through any differences between what you remembered in this exercise and how you answered the survey questions?*

*Why or why not did you include {x}?*

*Is there anything that you think is missing that we have not discussed?*

*How much do these services change from week to week?*

*What about case management? In the past 4 weeks, how much time did you spend on case management for the student?*

**[FOR SERVICES THAT VARY FROM WEEK TO WEEK:]** What sources would you use to help recall services that may vary from week to week?

### **STEP 5: STUDENT NEEDS ASSESSMENT**

Now I would like to show you a set of questions that measure student needs. I do not need you to answer these questions. I would like for you to take a few minutes to read them.

**[GIVE THE PARTICIPANT 5 MINUTES TO LOOK OVER THE QUESTIONS.]**

I now have a few questions. Thinking about {STUDENT}

1. On a scale of 1 (easiest) to 10 (hardest), how difficult would these questions be for you to complete?
  - a. **[If 5 or above:]** What specifically would be difficult to complete?
2. How sure are you that you can answer these questions?
3. Is there another person who may be better able to answer these questions?
4. Are there any words or phrases that would make answering these questions difficult?

Now, thinking about all your students,

5. Do these questions feel relevant for all the students you support? Do these questions provide a good picture of a student's functioning, disability severity, or level of need? **[If no, what questions would do a better job of addressing these topics?]**
6. We want to make sure we are using terms and language that are inclusive, respectful, and commonly used among teachers, staff, and students who are the focus of this research. Do you have any concerns or comments about the terminology and language in these questions?

### **STEP 6: MOTIVATION TO COMPLETE A SURVEY ON SPECIAL EDUCATION SPENDING**

Finally, I want to talk about two topics:

1. Your recommendation for the best person or people to respond to this survey, and
2. Your recommendation for the types of incentives and messaging that would make completing a survey with these types of questions appealing.

First, let's talk about who this survey should be sent to first, because it may require various people to provide all the information about one student's special and general education services. After seeing the draft questions, to whom do you think we should send the initial survey and recruitment materials? This person would be responsible for making sure that all the various people complete their sections of the survey. Would teachers such as you be the ideal point of contact, or would someone else within the school be a better point of contact for making sure the different parts of the survey are completed?

**[RECORD RESPONSES; PROBE AS NEEDED ON THE DIFFERENT POSSIBLE POINTS OF CONTACT]**

Next, let's talk about how to make completing a survey with these types of questions appealing.

1. In your opinion, are there any types of information or messages that should be included in the recruitment materials that would motivate you to respond to a survey on special education spending?
  - a. **[IF NEEDED YOU CAN SHARE EXAMPLES, SUCH AS ENDORSEMENTS OR HIGHLIGHTING AREAS OF NEED FOR STUDENTS RECEIVING SPECIAL EDUCATION SERVICES]**

2. *How about incentives? Are there any incentives that should be included with this future survey? Incentives could be monetary incentives, or they could be nonmonetary, such as pizza parties for schools, or professional development opportunities.*

*Are there any potential barriers that would prevent you from participating in a survey like this on special education spending?*

## **STEP 7: CONCLUSION**

*Thank you very much for participating. Your feedback was invaluable and will help us improve the survey questions that we are developing. We will send you an e-mail with the \$50 Amazon e-gift card as a thank you for your help.*

*Before we end, is there anything we haven't talked about that you think is important for me to know?*

*Again, thank you for your time and have a great day.*

## Cognitive Interview Protocol—Local Education Agency Student Services Survey

|                         |  |                    |  |
|-------------------------|--|--------------------|--|
| Interview ID:           |  | Date of Interview: |  |
| Participant First Name: |  | Interviewer:       |  |
| Local Education Agency: |  | Round:             |  |

### STEP 1: WELCOME AND INTRODUCTION SCRIPT

**Interviewer Instructions:** The following scripts should NOT be read verbatim. Text in italics is suggested content with which the interviewer should be thoroughly familiar in advance. Text in square brackets presents instructions for the interviewer.

*Hello, my name is <your name> and I work for the American Institutes for Research. It's nice to meet you. Thanks for joining us today to help us out. [Confirm that they can hear and see (if applicable) you and your screen okay—troubleshoot if the video and/or audio are not working well.] As noted before, please make sure you are in a quiet space to make sure you can hear us and we can hear you clearly. Interruptions are okay during this interview, but we hope to minimize them as much as possible.*

[Create small talk to build rapport]:

*You are here today to help us develop a survey on special education spending for the U.S. Department of Education. This survey will ask local education agency administrators, student services coordinators, or special education directors about what is spent on special education program administration and compliance. For our conversation today, I will ask you to answer some questions about what was spent on special education in your district or local education agency this school year. There are no right or wrong answers, and it's okay if you do not know some of the answers. In fact, we anticipate that some questions will need to be answered by other people, so we want to get your feedback about who may be the best reporters for some questions. As you are answering the questions, I will ask you about your answers to them. This will help us make the survey better and clearer for other respondents.*

*Because the information you provide is so important, I am going to take notes while you are answering the survey and while we are talking [INSERT IF THERE IS AN OBSERVER: and my colleague will also observe our session today].*

*It's important that you know your responses about you or your local education agency will only be used to refine and improve survey items that will be included in a future study on special education spending. None of our study reports will name you or your agency or use the content of your responses. The study information is being collected under the confidentiality and data protection requirements of the Education Sciences Reform Act of 2002, Title I, Part E, Section 183.*

*We will audio and video record the interview so researchers can review the recording later. Again, any information that refers to specific information, such as your name or the name of your district, will not be included in our report, and your responses will be used for research purposes only. Recordings will be deleted at the end of the research study.*

*Do you agree to the recording?*

*(if no, that's fine. You can still participate.)*

*Do you agree to participate?*

*Remember, you are not being tested: We want you to tell us what you think about the questions on the survey.*

*If at any time you want to stop, just let me know.*

[If, for any reason, the participant is no longer interested in participating, thank the participant for their time and end the interview.]

*Before we continue, do you have any questions? [Answer any questions the participant may ask.] Okay, now to make sure we can jump in, do you have the Word file that we sent to you? [If not, instruct them to open the Word file; if they do, thank them and let them know we will be using them shortly].*

**[If the respondent has consented to recording, start the recording the video conference using the "record" option in Zoom. After this step, ask the respondent to state their consent to be recorded again so that it's on the record.]**

## **STEP 2: THINK-ALOUD PRACTICE**

*When we begin the interview, I want you to share your screen with the Word document that we emailed you. This file has the survey questions that we are developing. While you read the materials, I want you to talk aloud about what you are thinking. Hearing what is going on in your head will help me understand how to make the questions better. To help you get started on thinking aloud, we are going to do a practice activity. Here is an example.*

*On the screen, there is a question. I would like you to read the question out loud and think aloud as you decide on your answer.*

**[Share your screen with the respondent for the think-aloud practice.** If you are not able to share your screen, please read the question out loud to the participant and have them think out loud.]

*How many glasses of water did you drink yesterday?*

Probe as needed for detail: ***How did you arrive at that answer? What were you visualizing when you were deciding on that answer? Can you tell me more about what you are including in your count?***

When complete: ***Thank you, that's the kind of detail I'm looking for when you talk to me about the questions.***

**[INSTRUCT THE PARTICIPANT TO SHARE THEIR SCREEN WITH THE WORD DOCUMENTS SHARED WITH THEM PREVIOUSLY. (IF NEEDED, SHOW THE PARTICIPANT HOW TO SHARE THEIR SCREEN.) OPEN THE WORD FILE WITH SURVEY QUESTIONS.]**

### **STEP 3: COMPLETING SURVEY QUESTIONS AND IDENTIFYING BEST RESPONDENTS**

*Now I would like you to complete the questionnaire.*

*I'd like you to think aloud while you decide on your answer. Please read aloud the questions and anything you would have read to yourself if I were not here.*

*Remember that I am very interested in hearing you talk about what you are thinking as you figure out your answers to the questions.*

*As you are answering the questions, I am particularly interested in three aspects:*

- 1. Sections, or specific questions, that you don't think you could accurately report about. If that is the case, tell us why and whether a different person might be able to complete it. This could be a person at a school, such as a teacher or guidance counselor, or someone else in the district, local education agency, or state office.*
- 2. Sections, or specific questions, for which you are the best reporter, but the questions are burdensome to answer. This could be because the information required to answer the question is not easily accessible or some other reason.*
- 3. Sections, or specific questions, for which you are the best reporter, but you are unsure whether you are answering it correctly. This could be because the questions use confusing or outdated language.*

*We will stop at the end of each section to discuss these questions more.*

*Remember to say your answer out loud and I will record your response.*

**[MAKE SURE THAT THE PARTICIPANT IS SHARING THEIR SCREEN. THE INTERVIEWER AND NOTETAKER SHOULD MAKE SURE THAT THE PARTICIPANT SAYS THEIR ANSWER ALOUD AND THAT THE ANSWER IS RECORDED.]**

**REMEMBER TO TELL THE PARTICIPANT THROUGHOUT THE QUESTIONNAIRE THAT THEY ARE DOING A GREAT JOB THINKING ALOUD AND THAT THEIR ANSWERS TO YOUR QUESTIONS ARE REALLY HELPFUL. ALSO, MAKE SURE THAT YOU FOLLOW ALONG AND KEEP THE DRAFT ITEMS WITH YOU SO YOU CAN MARK THEIR ANSWERS TO BE ABLE TO FOLLOW-UP ON AN ITEM IF NEEDED.]**

**Useful Probes—Use only as needed when response is unclear or respondent appears confused or unsure.**

Can you tell me in your own words what that question was asking?

What does the word [term] in this question mean to you?

How easy or difficult is it to remember [topic]?

How easy or difficult was it to choose an answer?

Tell me what you are thinking?

How did you come up with that answer?

Did you look at any sources, such as a report, budget document, software system, or data dashboard? Tell me about those. What do you record in it? How often do you look at it? How often do you update it?

You said [answer]. Can you tell me more about that?

**[If you pick up on a visual cue, such as a furrowed brow or a puzzled look:]** “Tell me what you are thinking.”

**[If you pick up on a visual cue (or hear a cue) that indicates confusion, such as paper flipping or rereading an old question before answering this question:]** “Tell me about what you were just doing.”

**[THE DRAFT ITEMS ARE DIVIDED INTO THE FOLLOWING SECTIONS. AT THE END OF EACH SECTION, ASK THE FOLLOWING PROBES:]**

| <b>Local Education Agency Student Services Survey Sections</b> | 1. How well are you able to answer the questions in this section? How hard was it to answer these questions? | 2. Could another person answer these questions? Who would that be? | 3. How sure are you of your answers in this section? | 4. Does this section include confusing or out-of-date language? | 5. What types of documents or materials would be useful in answering the questions in this section? |
|----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Service arrangements                                           |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Staffing                                                       |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Direct costs                                                   |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Student transitions                                            |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Assistive technology                                           |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Curriculum administration/planning                             |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Homebound/hospital programs                                    |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Tuition/fees for external placements                           |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Extended school year services                                  |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Child find/student eligibility                                 |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Procedural safeguards and due process                          |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Compliance activities                                          |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |
| Transportation                                                 |                                                                                                              |                                                                    |                                                      |                                                                 |                                                                                                     |

**General Interviewer Observations Instructions:** We would like for you to keep an eye on how the participant might react or mention a phrase or word that causes confusion because they did not have the information to answer, or struggled to recall the question. Please make notes about these issues or if the participant has any reactions to these:

- Out-of-date or confusing phrasing
- Layout of questions
- Sections they cannot answer
- Better reporters for certain sections
- Documents or resources that they would need to reference

#### **STEP 4: MOTIVATION TO COMPLETE A SURVEY ON SPECIAL EDUCATION SPENDING**

*Finally, I want to talk about two topics:*

1. *Your recommendation for the best person or people to respond to this survey, and*
2. *Your recommendation for the types of incentives and messaging that would make completing a survey with these types of questions appealing.*

*Lets talk about who this survey should be sent to first, since it may require various people to provide all the information about your local education agency. After seeing the draft questions, to whom do you think we should send the initial survey and recruitment materials? This person would be responsible for making sure that all the various people completed their sections. In your opinion, to whom in your office would be the best point of contact for making sure these different components get completed?*

[RECORD RESPONSES; PROBE AS NEEDED ON THE DIFFERENT POSSIBLE POINTS OF CONTACT]

*Next, let's talk about how to make completing a survey with these types of questions appealing.*

1. *In your opinion, are there any types of information and messages that should be included in the recruitment materials that would motivate you to respond to a survey on special education spending? [IF NEEDED YOU CAN SHARE EXAMPLES, SUCH AS ENDORSEMENTS OR HIGHLIGHTING AREAS OF NEED FOR STUDENTS RECEIVING SPECIAL EDUCATION SERVICES]*
2. *How about incentives? Are there any incentives that should be included with this future survey? Incentives could be monetary incentives, or they could be nonmonetary, such as reports on the study findings tailored for your district..*

*Are there any potential barriers that would prevent you from participating in a survey like this on special education spending?*

#### **STEP 5: CONCLUSION**

*Thank you very much for participating. Your feedback was invaluable and will help us improve the survey questions that we are developing. We will send you an e-mail with the \$50 Amazon e-gift card as a thank you for your help.*

*Before we end, is there anything we haven't talked about that you think is important for me to know?*

*Again, thank you for your time and have a great day.*