

National Study of Special Education Spending Foundational Phase Pilot Study Recruitment

OMB# 1850-0952 v.10

Volume I Supporting Statement

Submitted by:

**National Center for Education Evaluation and Regional Assistance (NCEE)
Institute of Education Sciences (IES)
U.S. Department of Education
Washington, DC**

June 2024

Attachment

Initial Recruitment Letters and FAQ

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1) SUBMITTAL-RELATED INFORMATION

The following material is being submitted under the National Center for Education Evaluation (NCEE) generic clearance agreement (OMB# 1850-0952), which provides NCEE the capability to collect preliminary or exploratory information to aid in study design by: (1) fielding brief, quick turnaround surveys, extracting test case administrative data, administering interviews, or conducting “mini-experiments” in advance of a study for the purpose of determining feasibility, a random assignment or comparison group strategy, or a data collection approach most suitable for a potential or planned evaluation; and (2) developing, testing, and improving its survey and assessment instruments, methodologies, and study dissemination strategies.

This request is to recruit local education agencies (LEAs) and schools for a pilot study that will test a data collection plan in advance of the [National Study of Special Education Spending](#) (NSSES). Specifically, the future pilot study will test the feasibility of the NSSES’ planned survey instruments and sampling and measurement methods and will ensure the data collection approach minimizes burden and yields the necessary data to generate the study’s core estimates of spending on special education. The pilot study builds on a prior, approved generic clearance request ([OMB# 1850-0952 v.8](#)) to conduct cognitive interviews to develop the study’s survey instruments. NCEE will partner with the American Institutes for Research (AIR); Allovue, a PowerSchool company; and NORC at the University of Chicago to carry out the pilot study recruitment and data collection. In this request, NCEE is seeking OMB approval to begin contacting and collecting rosters for student sampling in 31 state education agencies (SEAs), 50 LEAs, and 225 schools beginning July 1, 2024. The full design of the pilot study is still in development, and a subsequent package detailing the pilot study’s plan to test data collection approaches will be submitted for OMB approval under the generic clearance agreement in the fall/winter of 2024.

2) BACKGROUND

The field has a critical need for current information about what is spent to provide special education and related services to students with disabilities (SWDs) and about the sources of funding used to pay for this spending. More than 7 million SWDs—about 15% of students enrolled in public K–12 education—receive special education services under the Individuals with Disabilities Education Act (IDEA; NCES, n.d.). Providing special education involves a considerable educational investment. In 2021, the federal government allocated more than \$13 billion in IDEA grant awards to states to provide special education services to school-age students (U.S. Department of Education, 2023). However, policymakers do not have access to accurate, up-to-date information about how this money is spent to educate SWDs (National Council on Disability, 2018). Federal policymakers need national spending estimates so that they can make informed decisions about how much to appropriate for IDEA, including full funding.

Recurring national school finance surveys conducted by the U.S. Department of Education (ED) do not collect data in sufficient detail to develop national estimates of special education spending (Griffith, 2016; Kolbe, 2019). Instead, the most recent spending estimates are derived from the Special Education Expenditure Project (SEEP), conducted by AIR for ED during the 1999–2000 school year. Now more than 20 years old, the SEEP estimates are insufficient to guide contemporary policy decisions. Since SEEP, significant changes, including the following, have occurred in the special education landscape that affect what is spent to educate SWDs:

- Changes to the prevalence and characteristics of the SWDs who receive special education services and their overall level of need (National Center for Education Statistics, 2023)
- Shifts in where and how SWDs are served, particularly with respect to the amount of time SWDs spend in general education classrooms (McFarland et al., 2019)
- Updated federal and state policies and procedures that prioritize early intervention and shared responsibility between general and special education for educating SWDs (Bailey, 2019, 2021)

- Increased expectations that IEPs meet the substantive standard set by the *Endrew F. v. Douglas County School District* (Re-1, 137 S. Ct. 988; Library of Congress, n.d.) and are aligned to general education content standards (Harr-Robins et al., 2013)
- Opportunities for SWDs to attend charter schools (Rhim et al., 2019)

A new NCEE study, the National Study of Special Education Spending (NSSSES), will produce up-to-date estimates of what is spent to educate SWDs that reflect these changes in the special education landscape. NCEE intends to field a pilot study in early 2025 for the purpose of determining the data collection approach that is most feasible for the NSSSES. To ensure that a sufficient number of LEAs and schools participate in the pilot, recruitment activities will take place in summer 2024, well in advance of data collection activities. High participation rates will ensure the results of the pilot are based on valid, reliable, and representative information about what states, districts, and schools spend to provide special education services.

3) DESIGN AND CONTEXT

The recruitment activities for which this clearance is requested will be used to secure the participation of sampled LEAs and schools in a pilot study. The activities include asking LEAs and schools to review and update their contact information, identify appropriate study respondents, and prepare and submit materials needed for student sampling. As noted, a future submission to OMB under the generic clearance agreement will request clearance for the pilot study's data collection.

The pilot study sample will be a nationally representative sample of 50 LEAs and about 225 schools, selected using a three-stage clustering sampling design. In the first stage, which has already been completed using publicly available data, we derived a sampling frame from the 2021–22 National Center for Education Statistics Common Core of Data (CCD) Public Elementary/Secondary School District Universe Survey and the 2020-21 Civil Rights Data Collection. The frame was limited to LEAs with at least one operating school and included LEAs identified by the CCD as both regular public-school districts and charter school districts. We stratified LEAs according to state and, insofar as possible, we explicitly stratified within states by the following LEA characteristics: (a) charter LEA status, b) LEA enrollment, (c) percentage of students in an LEA who experience poverty, and d) LEA locale (urbanicity). We drew a sample of 1,250 LEAs for the future full study and subsampled 50 LEAs for the pilot from the full study's anticipated sample. Two very large LEAs (>50,000 enrolled students) were selected with certainty, and the remaining 48 LEAs were selected randomly in a systematic way from the list of LEAs sorted by the characteristics used for stratification. This resulted in a sample of 50 LEAs from 31 states.

The second and third stages of sampling will be completed during the recruitment activities described in this package. In the second stage, approximately 225 schools will be sampled from participating LEAs. We will sample schools that enroll at least one SWD. In the third stage, we will sample SWDs and general education students within the selected schools.

We assume an 80 percent response rate at the LEA level, which will result in 40 participating LEAs and approximately 225 schools. We assume if a district agrees to participate that all schools sampled in the district will also participate. SEAs will be contacted as part of recruitment as a courtesy and for support, but recruitment of LEAs is not contingent on SEA response.

Some data collection is required during recruitment to provide information needed for the 3-stage sampling and for planning future data collection activities. Sampled districts will be asked to provide the following information to the study team during recruitment:

- LEA and school contact information
- Rosters of students who have an Individualized Education Program (IEP) to allow for sampling of students with disabilities (see Exhibit 1)

- Rosters of students enrolled in sampled schools to allow for sampling of students without disabilities (see Exhibit 1)
- Appropriate pilot study contacts at the LEA and schools

Key features of the sample design are shown in Exhibit 2.

Exhibit 1. Data requested with rosters of students

Data Elements	Description
Student name	First and last name of sampled students are needed to assign survey reporters for the Student Resource Survey
IEP indicator	Does the student receive special education or related services through an Individualized Education Program?
Disability classification	LEA classification of disability type
Gender	Specification under development. We anticipate we will collect gender as reported by the LEA or school.
EL indicator	Does the student qualify as an English Learner based on state policies?
Student LRE placement (including outside of district)	LRE is Least Restrictive Environment and refers to the setting where a student with a disability receives their education.
Student grade level	Kindergarten through grade 12. The study excludes pre-kindergarten.
Student race	Specification under development. We anticipate we will collect race as reported by the LEA or school.
Student ethnicity	Specification under development. We anticipate we will collect ethnicity as reported by the LEA or school.
Date of Birth	MM/DD/YYYY
School identifier	Specification under development. We anticipate we will collect the <i>EDFacts</i> school identifier.
FRPL or ED designation	Does the student qualify for free or reduced priced meals or does the student qualify as economically disadvantaged?

Exhibit 2. Key features of the pilot study sample design

Design feature	Description
3-stage design	1–LEA 2–School 3–Student
Sampling frames	U.S. Department of Education data files to sample LEAs and schools: <ul style="list-style-type: none"> • 2021–22 Common Core of Data (CCD) Public Elementary/Secondary School District Universe Survey • 2020-21 Civil Rights Data Collection (CRDC)

	Student rosters provided by LEAs and schools to sample students with and without disabilities
2 large LEAs sampled with certainty	Los Angeles Unified School District Broward County Public Schools
Stratification at primary sampling unit (LEA)	State, charter status, enrollment, percent of students who experience poverty, locale, percent of students receiving special education, percent English language learners, grade levels served
Key sample disaggregation	Students with disabilities in 13 disability categories; general education students
Expected number of students sampled per school	3 to 4 on average 24 maximum (expected to occur only in very large schools)

The recruitment activities for the pilot, and the future pilot study itself, will mimic the design and approach we intend to use for the full-scale NSSSES. The goal of the full-scale NSSSES is to collect LEA, school, and student-level information on services, resources, and school finance that will be used to calculate nationally representative estimates of average special education spending. To achieve this goal, the NSSSES will ask LEA staff to report detailed, line-item, administrative data on spending for special education and for some aspects of general education. It will also ask LEA staff to complete a finance survey and a survey of student services provided in the district. To achieve critical student-level information for the cost-estimation, the NSSSES will ask multiple school staff (classroom teachers, special education coordinators, and related service providers) about the instruction and services each sampled student receives, and their needs, through a student resource survey. The study also plans to collect Individualized Education Plans (IEPs) for sampled students with disabilities from schools and/or districts. These data collection methods, and associated burden and participant incentives/compensation, are previewed in the materials that will be shared with sampled schools and agencies during recruitment activities (Attachment 1).

4) RECRUITMENT AND DATA COLLECTION

AIR and NORC will be responsible for the pilot study recruitment.

SEA Notification

The first step will be to notify SEAs that 1) the study is happening, 2) it is important, and 3) that we need support in recruiting LEAs. In July 2024, NORC will send a notification letter and E-mail to each state’s chief education official that both solicits the SEA’s support and identifies the LEAs that have been selected to participate in the study (see Attachment 1).

Additionally, we will identify ED-sponsored meetings or other gatherings where SEA officials and state special education directors will be in attendance and then use these opportunities to announce the study and field questions.

LEA Recruitment

NORC and AIR will collaborate to recruit sampled LEAs to participate in the pilot study. In July 2024, AIR will provide NORC with the list of LEAs and schools sampled for the pilot study. NORC will then, through a series of directory and web searches, develop the necessary contact information for each sampled LEA and school, including its location (address) and the name, title, and E-mail address for the initial contact at the location. Verifying information prior to recruitment also provides a chance to confirm whether there have been LEA or school closures, mergers, or splits in the timeframe between when the sample frame was created and when LEAs and schools are recruited for the pilot study.

We will secure LEA participation before approaching sampled schools. Some LEAs will take longer to recruit than others. As a result, recruitment activities for LEAs may go through December 2024 and the timing for specific activities may be dependent on a specific LEA.

NORC will begin LEA recruitment in July 2024 by sending a letter and study information materials via FedEx or priority mail and email to LEA superintendents and special education directors (see Attachment 1). Immediately after the initial contact, NORC will follow up by email and phone to confirm receipt, answer questions, identify LEA-specific research approval protocols, and secure participation. NORC will send weekly emails until a response is received. If the response is a refusal, NORC recruitment managers will classify it as a soft or hard refusal. Soft refusals will receive additional follow-up from refusal conversion experts. Hard refusals will be considered non-respondents.

To support LEA recruitment efforts, we will:

- 1) Provide instructions for how to generate student rosters needed for sampling, and experts at AIR will be available to support LEAs with technical assistance with fulfilling requests, including providing sample code for pulling data from administrative data systems. Rosters will be submitted via NORC's data collection system (Voxco);
- 2) Prepare and submit LEA-specific research request applications for LEAs who require it, and;
- 3) Deliver a webinar for LEA officials to learn more about the study.

School recruitment

Generally, the approach to recruiting schools will mirror that used to recruit LEAs. Like LEAs, some schools will take longer to recruit than others. As a result, while recruiting schools for the pilot study will begin in August 2024, recruitment activities for schools may go up to or into the data collection period, and the timing for recruitment activities will depend on a specific school.

Once an LEA agrees to participate, NORC will:

- 1) Send initial notification to schools within 7-10 business days of receiving notice the LEA agreed to participate in the study (see Attachment 1). The communication will reference the LEA participation approval.
- 2) Follow up with the school by email and phone within three days of when the school received its mailing to confirm receipt, answer questions, and secure participation.
- 3) Send a weekly batch E-mail until personal contact is made with the point of contact within a school.
- 4) Request assistance from the LEA point of contact in connecting with the school contact if first contact (by phone or Email) is not made within two weeks of the mailing having been sent.

We will request that the school principal or other school leader assign a "school coordinator" to coordinate data collection, including prompting teachers and related service providers to respond to surveys.

NORC and AIR will use the same refusal conversation procedure as described above for refusing LEAs.

5) ESTIMATED RESPONDENT BURDEN

Exhibit 2 details the respondent burden for the recruitment activities. The recruitment activities include review and updating of contact information, identification of appropriate respondents, communication about the pilot study, and preparation and submission of materials needed for student sampling. The estimated burden in Exhibit 3 is only for the recruitment activities for which we are seeking clearance in this volume. Note that the FAQ document in Attachment 1, which will be shared with study respondents during recruitment activities, previews for respondents

the total estimated burden for *all* pilot study activities and therefore reports greater total burden hours than appear below in Exhibit 3.

Exhibit 3. Estimated Respondent Burden for Recruitment Activities

Recruitment Unit	Number of Recruitment Units	Number of Responding Units	Hours Per Unit	Total Burden in Hours
SEA	31	31	1	31
LEA	50	40	3	120
School	225	225	1	225
Total	306	296	NA	376

Note. NA = Not applicable.

6) ESTIMATE OF COSTS FOR RECRUITING AND PAYING RESPONDENTS

There is no direct cost to respondents. There will be no payments made during the recruitment activities for which this clearance is requested and no prepaid incentives. LEAs, schools, and survey respondents will be offered postpaid incentives for participating in the eventual pilot study. All payments will be in the form of a selection of electronic gift cards.

Recruitment materials reference the participation incentives (see Attachment 1). Incentive amounts are based on the incentives proposed for the National Center for Education Statistics, Early Childhood Longitudinal Study, Kindergarten Class of 2023-24 (ECLS-K:2024) in [OMB# 1850-0750 v.30](#). The NSSES is very similar to the ECLS-K:2024 in its nested design—cooperation is needed from schools, school coordinators, and teachers. Additionally, the NSSES design has an LEA-component and school participation is contingent on LEA participation.

The NSSES is a non-repeating cost-study intended to provide data to inform federal policy change. It requires necessarily detailed and therefore burdensome data requests from LEAs, schools, and staff to obtain accurate spending estimates. The LEA institutional data request involves critical data needed for sampling and spending estimation and the school student resource survey requires not only detailed data, but also coordination among multiple school staff respondents. Given the many demands and outside pressures that LEAs and schools and their staff face, it is essential that they see the burden being asked of them is recognized and that their participation is valued. These staff include the LEA financial teams who need to provide detailed financial data; the school coordinator who will play several roles as a survey reporter, a study liaison, and a study motivator/champion; and the teachers and service providers who will need to report student-level data. The incentive amounts proposed provide this recognition and value.

A review of the literature supports the need for incentives, especially monetary incentives. Singer and Ye (2013) concluded that, “incentives increase response rates to surveys in all modes, including the web, and in cross-sectional and panel studies” and that “monetary incentives increase response rates more than gifts.” Singer and Ye also note that prepaid incentives are most effective, but can be difficult to provide for web surveys. Because the NSSES is web-based and uses nested recruitment (LEA, school, teachers/providers) and multiple possible respondents, we are proposing promised incentives that respondents will select in real-time via a question at the end of the online survey.

NCEE is undertaking several research activities to ensure the NSSES data collection maximizes accuracy while minimizing burden, including; cognitive interviews, a technical advisory group, an innovative financial transactions analysis, and the upcoming pilot study. None-the-less, perceived burden on LEA and school staff will be one of the most critical factors administrators consider when deciding if they will participate in the study.

Although participation incentives will be paid after future pilot study activities, the amounts are referenced in the materials that will be used during the recruitment activities for which this clearance is requested. Exhibit 4 shows the proposed incentive amounts and conditions for the future pilot study. Some conditions will be experimentally tested during the pilot. Corresponding amounts proposed for the ECLS-K:2024 are provided for comparison.

Exhibit 4. Incentive strategy for NSES LEAs and schools and corresponding ECLS-K:2024 incentive

LEA incentive strategy

Recipient	Amount	Conditions	Experimental Conditions	ECLS-K:2024 Amount
LEA or charter (institutional)	\$500	Full amount paid when all LEA-level data requests are completed	None	Not applicable
Survey reporter	\$60 for 90 minutes	Full amount paid upon completion of survey	None	\$27 for 35 minutes

School incentive strategy

Recipient	Amount	Conditions	Experimental Conditions	ECLS-K:2024 Amount
School (institutional)	\$300	Pizza party (up to \$300 in value) provided for school if 70% of student surveys are completed	For 40% of schools	\$300
School coordinator (this person will play several roles: a survey reporter, a liaison, and a champion for the study)	\$200	\$150 paid if 70% of student surveys are completed Additional \$50 paid if 100% of student surveys are completed	For the 60% of schools that do not receive the institutional incentive	\$135 (prepaid over 3 rounds)
Survey reporter	\$60 for 90 minutes	Full amount paid upon completion of survey	None	\$27 for 35 minutes

7) COST TO FEDERAL GOVERNMENT

The total cost to the federal government for pilot study recruitment will be \$425,825. This cost includes staff training, recruitment materials and activities for SEAs, LEAs, and schools, roster collection and review for sampling, and all nonresponse and follow-up contacts prior to data collection.

8) ASSURANCE OF CONFIDENTIALITY

The study team will assure institutions and individuals participating in the study that all data provided may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151). The laws pertaining to the collection and use of PII will be clearly communicated in correspondence with states, districts, schools, and staff. Letters and informational materials will be

sent to district and school staff describing the study and the extent to which respondents and their responses will be kept confidential. This information will also be included in any research applications required by school districts. A list of students will be requested from school districts and/or schools under the FERPA exception to the general consent requirement that permits disclosures to authorized representatives of the Secretary for the purpose of evaluating Federally supported education programs (34 CFR §§ 99.31(a)(3)(iii) and 99.35). This information will be securely destroyed when no longer needed for the purposes specified in 34 CFR §99.35.

Rosters of students with and without Individualized Education Plans (IEPs) will be requested from sampled LEAs as part of the recruitment activities described in this package. The information provided in the student rosters will contain participant-level personally identifiable information (PII), including name, date of birth, IEP status, and disability classification (see Exhibit 1). This information is essential for drawing both the school and student samples. For the pilot and full studies, the IEP roster provided by the sampled LEA will be used to ensure that only schools enrolling at least one SWD are included in the school sample. And, for the pilot study, the information will ensure that the student sample serves several key goals of the pilot. First, information on students' disability classification will ensure that the pilot study draws a sufficient number of students in each disability category, which in turn will allow the study to understand current variation in total spending for different types of SWDs and produce policy-relevant, disability-specific estimates of spending with adequate precision. Second, information on IEP status and student demographic characteristics will ensure the future pilot study can test two approaches to sampling students without disabilities for comparison to SWDs – one approach draws a nationally representative sample of students without disabilities, and the second approach draws a counterfactual sample of students without disabilities who are observationally similar to the sample of SWDs according to relevant characteristics of interest. No other alternative approaches are available to reliably obtain this information or test and refine the study's sampling design.

AIR and its research partners will protect the full privacy and confidentiality of all data collected for the pilot study's recruitment activities and will use it for research purposes only. When reporting the results, the study team will present data only in aggregate form, so that individuals and provider sites are not identified. The study team will also take the following steps to protect confidentiality in the pilot study:

- All data collection staff at AIR and any data collection subcontractors will complete required background clearances (i.e., e-QIP) and will sign agreements that emphasize the importance of confidentiality and specify employees' obligations to maintain it. This security clearance requires completing personnel security forms, providing fingerprints, and undergoing a background check.
- All members of the study team with access to the data will be trained and certified on the importance of confidentiality and data security. Staff will receive training regarding the meaning of confidentiality, particularly as it relates to handling requests for information and providing assurance to respondents about the protection of their responses.
- All data containing PII will be stored in a system that meets ED's security requirements and include security measures to limit data access, and transfer files securely.
- Access to PII will be limited to a small number of individuals who have a need to know this information. All staff with access to these data will go through required background clearances (i.e., e-QIP) and will receive training about confidentiality.
- Access to printed documents will be strictly limited. Documents will be stored in locked files and cabinets. Discarded materials will be shredded.
- AIR established a data governance and security plan for all information collected as part of the pilot study. The data governance/security plan specifies procedures for managing these data, including: external

requirements related to security (e.g., applicable regulations); roles and responsibilities of study team members, including processes for onboarding new staff, monitoring and granting access to data, and managing subcontractor compliance; processes for information security, including accessing, storing, and transferring data; and processes for data quality control and data disposition. AIR’s Information Security Office has approved the appropriateness of all elements of the data governance/security plan.

- To ensure that study participants are properly protected, AIR’s Institutional Review Board will review the study’s design protocols, data governance/security plan, and all data collection instruments and procedures.

Materials sent to SEAs, LEAs, and schools will describe the study and the ways in which respondents and their responses will be kept confidential (see Attachment 1), including the following assurance of confidentiality statement: “Information collected for this study comes under the confidentiality and data protection requirements of the Institute of Education Sciences (The Education Sciences Reform Act of 2002, Title I, Part E, Section 183). ED and its data collection partners follow strict procedures for data storage and the protection of participants’ confidentiality. All data will be collected through secure, online systems, including secure file transfer protocols when necessary. Individual responses to survey questions will not be shared with anyone outside the study team. All the information may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20U.S.C. §9573 and 6 U.S.C. §151).”

9) JUSTIFICATION FOR SENSITIVE QUESTIONS

The recruitment does not include questions that might be considered sensitive.

10) PROJECT SCHEDULE

The project schedule (Exhibit 4) calls for pilot study recruitment to begin July 1, 2024. Recruitment is expected to be completed within 8 months of OMB approval.

Exhibit 4. Recruitment Schedule

Activity	Start Date	End Date
SEA notification	7/1/2024	9/1/2024
LEA recruitment	7/15/2024	12/31/2024
School recruitment	9/1/2024	3/1/2024

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