

**National Study of Special Education Spending  
Foundational Phase  
Pilot Study Recruitment**

**Attachment—Initial Recruitment Letters and Study  
Information FAQ**

**Table of Contents**

State Education Agency Letter Text..... 2  
District Letter Text..... 3  
School Letter Text..... 5  
Study Information and FAQ Text..... 7

**OMB# 1850-0952 v.10**

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

**June 2024**

# State Education Agency Letter Text

## Special Education Spending Study: The Time is Now

Dear [AGENCY CONTACT],

We are writing to notify you of a critical upcoming study, sponsored by the U.S. Department of Education (ED). The National Study of Special Education Spending (NSSES) will produce updated national estimates of what states and school districts spend to provide special education and related services.

### What is the National Study of Special Education Spending (NSSES)?

The best national estimates of special education spending in grades K-12 are almost 25 years old. Since that time, there have been significant shifts in the number and composition of students with disabilities and in the policies and conditions under which they are identified and served. The NSSES will generate up-to-date estimates of spending on special education and related services, meeting urgent information needs of federal, state, and local policymakers and practitioners.

The NSSES will collect information from a national sample of districts and schools about what is spent to educate students with disabilities, as well as what states and districts spend to operate their special education programs and comply with federal and state laws. A small pilot study will take place in the 2024-2025 school year, and the NSSES will take place during the 2025-2026 school year.

### Why do we need your help?

During the 2024-2025 school year, ED and its partners the American Institutes for Research (AIR); Allvue, a PowerSchool company; and NORC at the University of Chicago (NORC) will conduct a pilot study to test the NSSES design and procedures. We will be requesting participation from a sample of about 50 public school districts and 225 schools across the country. The following districts in your state have been selected for the pilot study:

[INSERT DISTRICT NAMES]

We request your partnership to support this important study, and specifically, ask that you **notify the sampled district(s) above about their selection for the pilot study:**

- Let them know NORC will be contacting them to participate in the pilot study.
- Convey that this is an important national study being conducted by ED to understand special education spending and encourage them to participate in the pilot.

Please see the enclosed brochure that details the pilot study timeline and the information requests that will be made of districts and schools. This pilot study will help us make the NSSES efficient, accurate, and minimally burdensome.

If you have any questions you can reach out to me directly, or the study Principal Investigator, Tammy Kolbe, at [NSSES@AIR.org](mailto:NSSES@AIR.org).

Sincerely,

Claire Allen-Platt  
Contracting Officer's Representative  
National Study of Special Education Spending  
Institute of Education Sciences  
U.S. Department of Education

## District Letter Text

Dear [DISTRICT CONTACT],

We are writing to inform you that [*District*] has been selected to participate in the pilot for the **National Study of Special Education Spending (NSES)**, sponsored by the U.S. Department of Education and conducted by the American Institutes for Research (AIR); Allovue, a PowerSchool company; and NORC at the University of Chicago (NORC).

The NSES is an important new study to update our understanding of the costs of special education and related services. The study will collect information from a national sample of districts and schools about what is spent to educate students with disabilities, as well as what states and districts spend to operate their special education programs and comply with federal and state laws. Your district has been selected to participate in a pilot study during the 2024-2025 school year, in advance of a large-scale national study that will take place in the 2025-2026 school year.

**We request your district’s agreement to participate in this pilot study. Participation is also asked of a select sample of your schools:**

[INSERT SCHOOL NAMES]

The expected time commitment for study activities in school year 2024-2025 is 8-10 hours for districts and 1-2 hours per survey for selected schools. Specifically, district and school participation will include the following:

| District   | School  |
|--|---|
| <ul style="list-style-type: none"><li>• Notify schools about the study and encourage participation.</li><li>• Provide district student enrollment data and IEPs if requested.</li><li>• Complete 2 online district-level surveys.</li><li>• Provide administrative and financial data.</li></ul> | <ul style="list-style-type: none"><li>• Identify a school-level coordinator to assist the study team and serve as main point of contact.</li><li>• Provide school student enrollment data and IEPs if requested.</li><li>• Identify the teacher(s) and service provider(s) who can complete an online Student Resource Survey about the educational program of some students. (average of 3-4 surveys per school).</li><li>• Encourage staff to complete the online Student Resource Surveys.</li></ul> |

The U.S. Department of Education values the time that educators devote to important studies such as these, and districts, schools, school coordinators, and respondents will be reimbursed for the time it takes to coordinate and complete surveys and provide administrative data. Districts and schools will receive between \$300 and \$500 via an electronic gift card, depending on the number of student surveys completed. School coordinators will receive up to \$200 depending on the number of surveys completed in their school. Respondents will receive \$60 for each completed survey.

**Your district’s participation is vital to understanding what is spent to educate students with disabilities. Your support will be invaluable in shaping future policies and programs.**

**A NORC team member will be reaching out to you soon to discuss the pilot and what we will be requesting from your district and school(s).** If you have any questions about the study, please contact the research team at [xxx@norc.org](mailto:xxx@norc.org) or call our study toll-free number at 888-872-0626. Please see the enclosed study FAQs for more information.

We look forward to working with you on this exciting study and are ready to address any questions or concerns you have about this effort.

Sincerely,

[AIR Project Director Name]  
Project Director  
American Institutes of Research

Cynthia Simko  
Data Collection Project Director  
NORC at the University of Chicago

[NAME TBD]  
[TITLE TBD]  
Allovue, a PowerSchool Company

## School Letter Text

Dear [SCHOOL CONTACT],

We are writing to inform you that [*school*] has been selected to participate in the pilot study for the **National Study of Special Education Spending (NSSES)**, sponsored by the U.S. Department of Education. This study is being conducted by the American Institutes for Research (AIR); Allovue, a PowerSchool company; and NORC at the University of Chicago (NORC). Your district has approved this study.

The NSSES is an important new study to update our understanding of the costs of special education and related services. The study will collect information from a national sample of districts and schools about what is spent to educate students with disabilities, as well as what states and districts spend to operate their special education programs and comply with federal and state laws. Your school has been selected to participate in a pilot study during the 2024-2025 school year, in advance of a larger national study that will take place in the 2025-2026 school year.

**We request your school's approval to conduct this pilot study and for your school to coordinate with a member of the NORC outreach team.** Specifically, we request that your school:

- Identify a School Coordinator who is familiar with your school and your special education services to assist the NORC team with the following:
- Provide a roster of students including their grade level, IEP status, English Learner status, date of birth, gender, race/ethnicity, and FRPL or ED designation.
- Identify the teacher(s) and service provider(s) who can complete an online Student Resource Survey about the educational program of some students selected from school and district rosters. We will ask staff to fill out a survey about approximately 3-4 students, on average.
- Encourage staff to complete the online Student Resource Surveys.
- Provide Individualized Education Plans (IEPs) for sample students, if requested

As a token of appreciation for their crucial role in ensuring the success of this pilot, School Coordinators will receive \$150 for their assistance plus a bonus of \$50 if all surveys for the school are completed (approximately 3 to 4 surveys total, on average). School staff who complete surveys that provide information about students will receive \$60 for each completed survey. Schools will receive \$300 if at least two-thirds of the school surveys are completed.

**Your school's participation is vital to understanding what is spent to educate students with disabilities.**

Any reports prepared for the study will summarize findings and will not associate survey responses or other data with a specific individual, school, or district.

**A NORC team member will be reaching out to you soon to discuss the pilot and what we are requesting from your school.** If you have any questions about the study, please contact the research team at [xxx@norc.org](mailto:xxx@norc.org) or call our study toll-free number at 888-872-0626. Please see the enclosed study FAQs for more information.

We look forward to working with you on this important study and are ready to address any questions or concerns you have about this effort.

Sincerely,

[AIR Project Director Name]  
Project Director  
American Institutes of Research

Cynthia Simko  
Data Collection Project Director  
NORC at the University of Chicago

[NAME TBD]  
[TITLE TBD]  
Allovue, a PowerSchool Company

## Study Information and FAQ Text

### National Study of Special Education Spending (NSSES): Pilot Study

**Purpose.** The U.S. Department of Education (ED) is developing a new National Study of Special Education Spending (NSSES). The NSSES will provide national estimates of what states, districts, and schools spend to provide special education and related services to students with disabilities.

Federal policy has long committed to cover a portion of the added costs of special education and related services that must be provided to students with disabilities under the Individuals with Disabilities Education Act (IDEA). But the best national estimates of what states, districts, and schools spend on special education are nearly 25 years old. In the past two decades, there have been significant shifts in the number and composition of students with disabilities and in the policies and conditions under which they are identified and served. Federal, state, and local policymakers and education leaders urgently need up-to-date national estimates for what is spent to provide special education services to inform their funding policies and budgeting for special education. The study will estimate spending on students with disabilities, what key factors influence that spending, and whether federal funding is close to IDEA's target of covering 40% of the added costs of special education.

**NSSES Pilot Study.** The NSSES pilot study will take place in the 2024-2025 school year, in anticipation of a larger, full-scale national study occurring in the 2025-2026 school year.

Information will be collected from a nationally representative sample of approximately 50 districts and 225 schools about what is spent to educate students with disabilities, as well as what states and districts spend to operate their special education programs and comply with federal and state laws. If selected for the study, your participation is very important - and as recipients of IDEA funding, districts are expected to participate in studies such as this one (Education Department General Administrative Regulations Section, 34 C.F.R. § 76.591).

### Frequently Asked Questions

**Who is conducting the study?** The Institute of Education Sciences (IES) within ED has partnered with the American Institutes for Research (AIR),<sup>1</sup> NORC at the University of Chicago (NORC),<sup>2</sup> and Allovue, a PowerSchool Company,<sup>3</sup> to design and implement the study.

**How will data be kept secure?** 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

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<sup>1</sup> American Institutes for Research [www.air.org](http://www.air.org)

<sup>2</sup> NORC at the University of Chicago [www.norc.org](http://www.norc.org)

<sup>3</sup> Allovue [www.allovue.com](http://www.allovue.com)

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).

**What data will participants be asked to provide?**

**Special Education and General Education Student Rosters:** Schools and districts will be asked to submit student rosters. These will be used to identify a sample of students with an Individualized Education Plan (IEP) as well as a sample of general education students. An average of 3 to 4 total students per school will be selected. School staff will be asked questions about these students.

**School Student Resource Survey:** School staff will complete a survey about the instruction and services each sampled student receives as well as student need. The survey will be divided into sections corresponding to different general and special education services, related services, and other academic interventions and supports. Each section will be completed by the staff member(s) who are most knowledgeable about the sampled student, such as classroom teachers, special education coordinators, or related services providers.

**District Student Services Survey:** District officials will complete an online survey about their special education service delivery models and resources used to administer special education programs and comply with federal and state special education laws.

**District Financial Data and Fiscal Officer Survey:** District officials will be asked to submit data from their financial and personnel information systems and complete a survey about aggregated special and general education spending.

**IEP Data Collection.** Districts/schools may be asked to provide IEPs for selected students. IEPs will be used for methodological purposes only, for example, understanding whether IEPs could be used to reduce survey reporting burden.

**What is the study schedule?** Outreach to sampled districts will begin in July of 2024. School outreach and student enrollment information collection will begin in fall 2024. Surveys will be administered in early 2025.

**What are the roles and responsibilities of those involved in the pilot study?** States, districts, and school-level staff all play a critical role in the success of the pilot study:

| Level    | Role and responsibility  | Expected time commitment |
|----------|--|--------------------------|
| State    | <ul style="list-style-type: none"> <li>Communicate with districts in their states to prepare them for outreach from AIR and NORC starting in summer 2024.</li> </ul> | 2-3 hours                |
| District | <ul style="list-style-type: none"> <li>Coordinate with the NORC outreach team who will be seeking approval to conduct the pilot.</li> </ul>                          | 8-10 hours               |



|        |  |  |
|--------|--|--|
|        | <ul style="list-style-type: none"> <li>• Assist with notifying schools about the district’s decision to participate in the pilot study.</li> <li>• Provide NORC with special education student rosters (template will be provided)</li> <li>• Provide financial data</li> <li>• Complete 2 LEA surveys</li> </ul>  |  |
| School | <ul style="list-style-type: none"> <li>• Coordinate with the NORC outreach team who will be seeking school participation approval.</li> <li>• Identify a School Coordinator who will work with NORC to ensure all components of the study at the school level are completed. This includes prompting teachers to complete surveys, assisting with identifying the appropriate staff to complete a survey (teachers, aides, guidance counselors, case managers, etc.), and providing student rosters.</li> <li>• Provide NORC with general education student rosters</li> <li>• Complete Student Resource Surveys (On average, schools will be asked to complete 3-4 student surveys).</li> </ul> | <p>4-6 hours for school coordinator</p> <p>1.5 to 2 hours per student survey</p> |

**Is there payment for participation?** Yes. Districts, schools, coordinators and respondents will be reimbursed for the time it takes to coordinate and complete surveys and provide administrative data. Districts and schools will receive between \$300 and \$500 via an electronic gift card, depending on the number of student surveys completed. School coordinators will receive up to \$200 depending on the number of student surveys completed. Staff who complete the Student Resource Surveys or Student Services Surveys will receive \$60 for each completed survey.

**OMB Approval.** The study’s recruitment activities, including collection of student rosters, has been approved by the Office of Management and Budget (OMB). The OMB control number is 1850-0952 v.10 and the approval expiration date is XXXX.

**Who should I contact if I have questions about this study?** More information about the study can be found at <https://air.org/project/XXXXX>. Study staff at NORC can be reached by phone at 888-872-0626, Monday through Friday, between 8:00 a.m. and 5:00 p.m. (Central Time). Study staff are also available to answer your questions via e-mail at [XXX@norc.org](mailto:XXX@norc.org). You may also contact the study Principal Investigator, Tammy Kolbe, at [XXXXX@air.org](mailto:XXXXX@air.org).