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Understanding policy reverberations across the educational ecosystem to effectuate change

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ABSTRACT

We outline a multidimensional ecological systems policy framework to better understand how the Individuals with Disabilities Education Act (IDEA) and patterns of racial disproportionality in special education relate. The framework engages with ideology, power, privilege, and context across the multiple layers of the policy-implementation process and educational ecosystem. It highlights how policy reverberates through the educational ecosystem via interpretation and implementation flows spanning from the exo-, macro-, and meso levels (e.g., federal policy, state education agency (SEA) guidance, local education agency (LEA) officials' actions, educators) to the micro- level (e.g., families and students) and back up. The framework provides critical insights that can inform efforts to reduce racial and ability inequities.

The Individuals with Disabilities Education Act (IDEA) is a civil-rights-inspired, individualized, and expansive piece of legislation that has significantly impacted students aged 3–21 with or at risk of educational-disability classification. Shortly after the passage of the Civil Rights Act of 1964, Congress passed the Education for All Handicapped Children Act (EAHCA, 1975, later renamed IDEA (1997, 2004)). Advocates — primarily caregivers and parents — worked to leverage the legal and legislative strategies used in the litigation for the landmark *Brown v. Board of Education* (1954) decision to argue that the segregation and exclusion of students with disabilities from educational services was a violation of the 14th Amendment's Equal Protection (U.S. Const. amend. XIV, § 1) and Due Process (U.S. Const. amend. XIV, § 1) clauses (see Ong-Dean, 2009). This legal strategy was rights based and shaped the outcomes of the landmark court cases of *Pennsylvania Association for Retarded Children v. Commonwealth of Pennsylvania* (1972) and *Mills v. Board of Education of the District of Columbia* (1972), which became the legislative basis of the EAHCA (1975) and, later, the IDEA (1997, 2004).

Given the civil rights legacy of IDEA, it can be assumed that IDEA implementation fidelity will lead to more equitable outcomes across policies, practices, and procedures —

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a perspective that is reliant on legal and practice-based recommendations to facilitate compliance (e.g., Brady et al., 2019). The underlying assumption behind the approach is that rights-based language and IDEA provisions can address student needs, including complex equity issues. However, despite the clear social justice and civil rights orientation of the legal cases that led to the passage of the EAHCA and the IDEA, these frameworks have taken less precedence in subsequent reauthorizations of IDEA (Zirkel, 2005), are not sufficiently critically explored in varied academic spaces (e.g., Strassfeld et al., 2023) and have not assured equitable outcomes for all students, as demonstrated by over 60 years of evidence of racial disproportionality in special education outcomes.

Racial disproportionality in special education

Racial disproportionality represents a long-documented (Dunn, 1968) and extensively researched (Ahram et al., 2021; Barrio et al., 2022; Morgan et al., 2017; Waitoller et al., 2010) equity issue related to disparities in suspension, classification, and placement patterns for students with disabilities by race. The field has grappled with the contradictory nature of the harms and benefits of special education through examinations of underrepresentation (e.g., Morgan et al., 2015) and overrepresentation (e.g., Waitoller et al., 2010), each presenting unique concerns that require targeted policy responses. However, the sources, causes, and magnitude of these disparities are complex and related to a variety of structural (Sullivan & Artiles, 2011), social (Cooc, 2018; Cruz & Firestone, 2022; Cruz & Rodl, 2018), and contextual (Aylward et al., 2021) factors, making policy and practice solutions difficult to identify and enact.

A large body of research has indicated that, compared to white peers, Black, Indigenous, and Youth of Color (BIYOC) with disabilities experience qualitatively different interactions with special education and discipline systems, including greater likelihoods of being placed in restrictive educational settings (Cooc, 2022), receiving low-quality services within those settings (Bannister, 2016; Lambert, 2018), and being removed from learning environments for disciplinary reasons (Welsh & Little, 2018). These disparate outcomes vary by racial group, disability category (Cruz et al., 2021), and locale (Fish, 2017, 2019; Voulgarides & Aylward, 2023).

The equity issue is addressed in IDEA (2004) via State Performance Plan (SPP) Indicators that measure racial inequities across classifications and placements (SPP Indicators 9 and 10) and suspensions (Indicator 4) for students with disabilities. The SPP Indicators, in the most general sense, require evidence of numerical reductions in local education agency (LEA) reported racial disparities along with qualitative IDEA compliance assessments (see Albrecht et al., 2012; Strassfeld, 2019). The operating theory of change behind the policy approach is that reductions in numerical disparities coupled with IDEA compliance will lead to more equitable outcomes.

The policy response has proven insufficient. It is an overly technical response to a complex equity problem (Albrecht et al., 2012; Cavendish et al., 2014; Ripma, 2023) that allow state education agencies (SEAs) and LEAs wide discretion in IDEA-compliance reporting (Elbaum, 2014). The SPP Indicator approach also operates on an unquestioned assumption that total compliance with IDEA will lead to educational equity (Voulgarides, 2018), yet policy compliance rarely provides a clear pathway to

equitable outcomes (e.g., Stein, 2004; Weiss, 1977). Despite these critiques, the SPP-Indicator approach remains the dominant policy tool for addressing racial disproportionality.

In this article, we address the clear need to problematize the SPP Indicator approach when addressing racial disproportionality using a systems lens (e.g., Taylor & Sailor, 2023). We outline a multidimensional ecological systems framework that highlights the limits of IDEA and propose a framework that engages with ideology, power, privilege, and context across the multiple layers of the policy-implementation process and educational ecosystem to better understand how complex equity issues like racial disproportionality can be better addressed across research, policy, and practice.

Proposing a framework for change

In proposing a framework for reimagining how to better address racial disproportionality, we engage with critical analyses (Horkheimer, 1972) that speak to oppressive ideologies infused in policy such as racism, patriarchy, classism, ableism, and colonial logics (e.g., S. A. Annamma et al., 2013; Cruz et al., 2023; Erevelles, 2011; Gillborn, 2014; Linton, 1998). We recognize that rehabilitation and medicalized understandings of disability undergird IDEA policy remedies like the SPP Indicators — leaving a policy framework that holds unresolved tensions between rehabilitative and rights-based language (Pettinicchio, 2019). Thus, our framework is predicated on the notion that IDEA technical remedies meld both a medical model of disability with civil rights discourse. Entitlements, rights, and benefits afforded to people with disabilities through federal policies are coupled with the historical intertwining of race and other social markers of difference that have been used to justify oppression, marginalization, and exclusion (Artiles et al., 2016; Kafai, 2021; Piepzn-Samarasinha, 2018).

We employed a contextual and ecological conceptual framework (Bronfenbrenner, 1977, 1992; Pagán, 2022; Talbott et al., 2011) that considers how policy interpretation and implementation flow from the macro level (e.g., federal policy, state education agency (SEA) guidance, local education agency (LEA) officials' actions) to practitioners, families, and students (see Figure 1) to uncover the mechanisms across policies, programs, and practices that contribute to and can reduce racial disproportionality. Through our *Multidimensional Ecological Systems Framework*, we can better understand the specific mechanisms that limit educational opportunity for BIYOC that are responsive to policy mandates, educational constituents' realities, and the needs, dreams, and experiences of caregivers and their children with disabilities.

Within the framework, IDEA is conceived of and defined at the federal as a macro level “big P” Policy, which travels to local jurisdictions and meso levels where it is negotiated through various institutional processes, referred to as “little p” policies (e.g., Ball, 1997; Tefera & Voulgarides, 2016). The federal statute shapes the structure of schooling at the local level (exogenous policy shock) and as federal policy filters toward local contexts, it gains meaning at the meso level and the areas it regulates — a form of legal endogeneity (Edelman, 2016; Edelman et al., 2011). Local actors' (e.g., SEA and LEA constituents) values, priorities, beliefs, and orientations are infused into acts of compliance (see Edelman, 2016) and educators make sense of IDEA mandates and the SPP Indicators in their everyday workflow and within their local contexts through localized logics of compliance

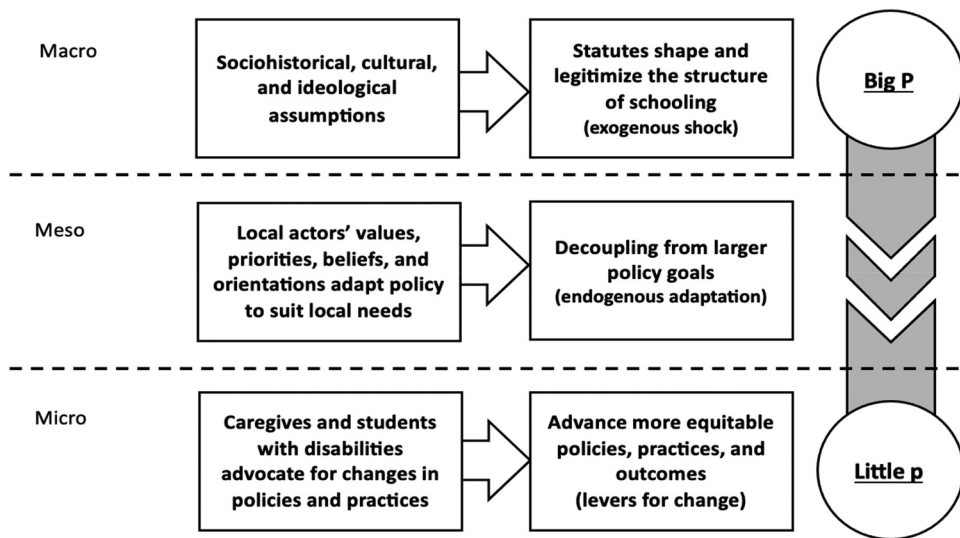


Figure 1. Multidimensional Ecological Systems Framework.

(Voulgarides, 2018; Voulgarides et al., 2021). The interpretation and implementation flow of rights-based IDEA policy and the SPP Indicators is translated to programs and policies that are then imposed on caregivers and students with disabilities and ultimately impacts how they experience IDEA administration, service delivery, and educational rights within their local context. We posit that the equity impacts of policy flow across and within the educational ecosystem are multi-faceted and significantly influence equity outcomes.

Policy reverberations across the educational ecosystem

The *Multidimensional Ecological Systems Framework* illustrates how policy reverberates across the education ecosystem to both (re)produce and disrupt inequities. The framework first considers how, from the macro to the meso level, IDEA’s ideological and legal codifications of disability remain unchallenged as they are imposed on SEAs and LEAs. Notions of ability, disability, and who deserves educational resources via the IDEA are constantly (re)negotiated across the educational ecosystem, but they are tethered to deficit and medicalized views of disability under a rights-focused framework (e.g., Connor et al., 2008). Racist and ableist hegemonies set the parameters for what is deemed to be “normal” or “abnormal” across contexts (Baglieri et al., 2011; Broderick & Leonardo, 2016) and thus leave ideologically oppressive structures at the macro-level (i.e., policy and law) unchallenged (Kattrell & Hernández-Saca, *in press*; Voulgarides et al., 2023). Thus, through educational federalism (Robinson, 2015; Strassfeld, 2019), which is the driving influence of SEA-level interpretations of policy and refers to how SEAs define, integrate, adopt, and comply with IDEA, allows for unquestioned notions of ability and disability to be absorbed into local contexts. It is here, where the resulting interactions across the levels of the educational ecosystem (i.e., from SEA to LEA), create variance across and within state and local jurisdictions (Harry & Klingner, 2014). Interpretation and implementation flow from the macro level (e.g., federal policy, SEA guidance) to practitioners, families, and

students as they function in the meso- and micro- system, which is inclusive of individual and classroom levels.

At the meso level (i.e., within schools and districts), the IDEA becomes responsive to specific constituents' needs and belief systems as it pertains to IDEA administration, while upholding unquestioned assumptions about "ability" and "disability" as they intersect with other student identities (e.g., racial, linguistic). These notions of disability and ability are continuously (re)negotiated through acts of compliance and interactions with the IDEA's policy structures across the educational ecosystem.

At the micro level, caregivers and students with disabilities experience IDEA administration from SEA and LEA constituents within local contexts laden with resource and power differentials (e.g., Ahram et al., 2011). In these contexts, some families and students *demand* services while others *receive* services (e.g., Harry & Klingner, 2014; Hess, 2008; Ong-Dean, 2009; Rao, 2000; Voulgarides, 2021). The differences between who *demand*s and who *receives* is often racialized and classed for a variety of social, structural, and interactional factors that occur within schools (Harry & Klingner, 2014; Harry & Ocasio-Stoutenburg, 2020; Wilson, 2015). Research consistently indicates service-delivery discrepancies across race and other social markers of difference (e.g., Nowicki, 2019) along with categorical manipulation (Saaticioglu & Skrtic, 2019) whereby some disability categories become desirable to more powerfully situated families so that they can secure coveted educational resources via IDEA (Luelmo et al., 2022; Ong-Dean, 2009; Pollock, 2010). This racialized service delivery and categorical manipulation is antithetical to the original aims of parent and caregiver advocacy around disability, yet it pervades the micro level. It also limits historically and multiply marginalized caregiver's capacity to serve as a significant lever of change to advance equity efforts, even though caregivers' and families' funds and wealth of knowledge can be transformative (Moll et al., 1992). Most consequentially, students are impacted by these oppressive forces, yet they rarely, if ever, have opportunities to impact policy beyond as they remain represented as an aggregated number that indicates a disparity, rather than complex humans experiencing the *doing* of ideologically oppressive policy on their bodies and minds (e.g., Cannon & Hernández-Saca, 2021; Hernández-Saca, 2016).

In its totality, our *Multidimensional Ecological Systems Framework* provides a systems level lens that considers how policy reverberates throughout the educational ecosystem. It highlights how ideology, power, privilege, and context influence the multiple layers of the policy-implementation process. It also critically problematizes top-down policy approaches as levers for change — like the SPP Indicator approach, by purposefully highlighting how the experiences of caregivers, and in particular Black, Indigenous, and Latinx caregivers of students with disabilities, and students themselves can be better leveraged to effectuate change.

Identifying levers for change

Macro level

The root causes of racial disproportionality are diffuse and manifest across various components of the educational ecosystem (e.g., Ahram et al., 2021; Kozleski et al., 2020). Therefore, there is a clear need to complicate the IDEA policy narrative related to racial

inequities, as racial disproportionality is not just a special education issue but also serves as a litmus test indicating entrenched educational debts owed to BIYOC (Ladson-Billings, 2006; Thorius & Tan, 2015; Voulgarides, 2023; Waitoller et al., 2010). Our framework calls for a repurposing of the IDEA racial equity remedies and it also calls attention to the ideologies embedded within the policy creation, administration, and implementation process that continue to frame non-dominant communities as deficient and in need of remediation (e.g., S. A. Annamma et al., 2013; Kolluri & Tichavakunda, 2023; Kozleski et al., 2023; Rosa & Flores, 2017).

Thus, we highlight the need for equity research to *speak more directly to policy* at the macro level and for equity questions *to be taken up by policymakers* across the educational ecosystem. We recognize that the core components of the IDEA are procedurally robust and connected to high-quality research (Zirkel & Rose, 2009), yet we also note that existing policy remedies have proven insufficient in remedying racial disproportionality. At minimum, racial equity remedies in the IDEA must include an intersectional analysis (Collins, 2019; Collins & Bilge, 2016; Crenshaw, 1990, 2017) that moves beyond singular assessment metrics (e.g., Etscheidt et al., 2023; Ripma, 2023). And although this is a technical step, it represents a more conceptually and ideologically robust method for addressing the issue.

Meso and micro levels

At the meso and micro level, it is necessary for LEA and school-based constituents to understand that the policy-implementation process is neither linear nor monolithic (Weiss, 1977). The everyday actions of educators are consequential across ideological and practice-based decisions. Therefore, practitioners must grapple with the ethics of compliance and how technical and symbolic acts of compliance negatively impact students (Voulgarides, 2018). And there is a direct need for the voices of those at the micro level (i.e., students with disabilities and their caregivers) to be meaningfully taken up in policy discussions across the ecosystem to effectuate change. Harry and Ocasio-Stoutenburg (2020) suggested advocacy and engagement rooted in DisCrit (S. A. Annamma et al., 2013) principles, which center caregiver, student, and family needs. This approach requires a deep restructuring of how caregivers and parents are valued in schools and how their experiences inform policy, practice, teaching, and learning.

Additionally, local levers of change must be activated across the meso and micro levels so that harmful endogenous processes are disrupted. Equity, race, and disability-oriented professional development and technical-assistance activities (e.g., Thorius, 2023) and critical curriculum, teaching, and learning practices (e.g., Waitoller & King Thorius, 2016, 2022) must be enacted at the local level, given that the IDEA does not engage with equity research focused on addressing intersectional oppressions (Collins & Bilge, 2016; Crenshaw, 1990, 2017). It is possible that these efforts will unravel beyond the local level as policy reverberates throughout the educational ecosystem, and as deficit ideologies remain unchallenged in federal statutes. However, research indicates these efforts can advance equity outcomes at the local level and positively impact student outcomes (e.g., Hernández et al., 2022; Thorius, 2023).

In summary, it is necessary to engage with a critical, contextual, and ecological lens (Bronfenbrenner, 1977, 1992; Pagán, 2022; Talbott et al., 2011) to both identify and

highlight potential avenues for change that can address complex equity issues across all levels of the educational ecosystem. We also show how ensuring rights and entitlements via procedural protections will rarely be sufficient for obtaining just and equitable outcomes if intersectional oppressions and deficit-based ideological orientations are not confronted throughout the policy development, interpretation, and administration processes across the varied levels of the educational ecosystem. In proposing this framework, we hope constituents across the educational ecosystem can begin to identify new avenues for change that: (a) problematize singular notions of identity; (b) acknowledge the social constructions of race and ability and corresponding impacts of racism and ableism; (c) recognize how policies uphold benefits to white students at the expense of BIYOC; and (d) provide direction toward activism, resistance, and social justice (see S. Annamma & Morrison, 2018; Boveda & McCray, 2021; Cruz et al., 2023; Gay, 2018, Gillborn et al., 2018; Ladson-Billings & Tate, 1995; Sablan, 2019) using a systems level and multi-dimensional perspective.

Disclosure statement

No potential conflict of interest was reported by the author(s).

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Additional resources

1. Fergus, E. (2016). *Solving disproportionality and achieving equity: A leader's guide to using data to change hearts and minds*. Corwin Press.

This book examines how educator beliefs and educational policies and practices converge to create systems of inequity. It also provides tools for dismantling disproportionate outcomes at the district and school level.

2. Khalifa, M. (2020). *Culturally responsive school leadership*. Harvard Education Press.

This book considers how educational leaders can grapple with language, race, and class inequalities across and within schools and districts. It provides education leaders with a multi-faceted and comprehensive approach for achieving more equitable outcomes.

3. Thorius, K. A. K. (2023). *Equity Expansive Technical Assistance for Schools: Education Partnerships to Reverse Racial Disproportionality*. Teachers College Press.

This book provides a comprehensive and critical analysis of racial disproportionality, along with strategies to address the inequity. It also provides insights for address racial disproportionality across various levels of the educational ecosystem.

4. Connor, D., & Ferri, B. A. (2021). *How teaching shapes our thinking about dis/abilities: Stories from the field*. Peter Lang Publishing, Inc.

This book contains personal narratives from leading scholars in special education and disability studies. From a variety of perspectives (teachers, students, leaders) they narrate how their experiences within and/or near to the special education impacted their personal and professional trajectories. Each chapter ends with thought providing questions that challenge how the current system operates and shapes educational opportunities.