

# Substitutes as Graduate Interns: Everyone Becomes a Winner

By Ralph M. Burke

When there is a collaborative endeavor between a local university and a neighboring community it is frequently referred to as a “Town and Gown” project. Substitute teaching has often taken a back seat to major assignments within a school district. Now with an increasing number of faculty, an emphasis for smaller class size, a greater effort in supporting staff development, and the move to meet specific needs within a school or for a specific child, the role of substituting takes on a more meaningful role. Additionally this role can play a critical factor in a “Town and Gown” effort.

The educating and training of graduate pre-service teachers and subsequently employing them as substitutes within a school district can be that unifying thread that becomes a win, win, win situation. Win for the college/university, win for the local school district, and win for the prospective teacher functioning as a substitute.

The substitute graduate internship program in Fairfield, Connecticut public schools was established in the mid 1970’s and has served school districts, nearby universities, and prospective candidates very well. This article will describe how the program came about, functions, and has evolved over the years to meet everyone’s needs.

## Background

A meeting was held during the 1970’s between several interested professors at the nearby University of Bridgeport and Fairfield School District administrators, each representing concerns of their respective organizations. Both parties had the capabilities to accommodate the other’s specific interest.

The *school district* was interested in developing a new program known as Gifted Education. There was a select number of children who had special needs that were not being met to the level of effectiveness the district wished to deliver. Further, there was the ongoing need to select and recruit qualified staff, and never has it been known for a school district to have an overabundance of substitutes.

The *university* had prospective graduate candidates who needed to gain experience and exposure. At the same time, these graduate students often needed a site for conducting action research.

The *substitute* needed a segue into the school district to conduct research, in some cases to student teach, and clearly as an

introduction to the school administration as a prospective teacher candidate. Further, all graduate students wanted to gain some “financial assistance” often referred to as a scholarship or grant.

The dialogue gave birth to the Graduate Internship Program that has essentially met all the identified objectives. The universities cooperated with the local school district in helping to develop a Gifted Education Program. The school system gained the necessary academic support, research, and at the same time increased the availability of substitutes who would ultimately become prospective candidates. The graduate students developed a long-standing relationship with the school district, obtained often-positive exposure within the district, had a built-in research lab, and all while gaining monetary support to defray tuition support. Everyone became a winner.

Shortly after the program was developed, and through the efforts of the Assistant Superintendent of Personnel, who had contacts with several of the neighboring universities, a concerted effort was made to expand the program to include the two private universities in the area - Fairfield University and Sacred Heart University. Now, all these universities now have a formal Graduate Internship/Substitute Program in cooperation with the neighboring school districts. The Norwalk Public Schools at one point had nearly 40 Graduate Interns through the University of Bridgeport program. Many other universities within the state along with their neighboring school districts have united in providing a similar graduate substitute program.

### **How It Works**

Graduate candidates research efforts to help the school district establish a program for gifted students. The university gains another recruiting tool for seeking graduate candidates, a means to market their prospective employees, and a means in which the academician can share professional talents and expertise that will spread over to a school district setting. A graduate student becomes committed to a specific school within a school district to provide 90 days of substitute coverage. In return, the school district places a stipend in the respective candidate’s name at the university in the amount of \$3,000. Since interns are essentially full-time quasi-employees of the district by day and graduate interns by night, being gainfully employed outside the internship is virtually precluded.

For the district the per diem cost for substitute coverage for these graduate interns is slightly higher than the normally established “per diem” substitute rate, but the benefits of this personalized program significantly outweigh the modestly higher cost. The permanent substitute, because he/she is assigned to a specific school, becomes one of the school “family” members. Like any faculty member,

beyond knowing the layout of the physical plant, they are knowledgeable of the daily school routine. Such an “employee” becomes an acquaintance of individual faculty members, students, and parents, and gains an understanding of the philosophy of both the district and the individual school. He/she also learns the curriculum, text, and special needs or exceptions that are too often assumed within the complex day to day operation of a school.

It is so convenient for a building administrator to be able to speak face-to-face to the substitute and request the individual to stop down the corridor to see Ms./Mrs./Mr. Teacher who is to be absent. This is an opportunity for the substitute to meet personally with a certified professional who can review the lesson plans for the day and provide minute-by-minute directions on what and how to teach the lessons in his/her pending absence. Issues for individual students can be covered and specialist assignments and/or other unique needs can be reviewed. When the substitute arrives on the date of assignment, there is greater confidence on his/her part to function effectively as a replacement teacher. The regular staff, including the administration, knows that it will be “business as usual.” The children benefit from continuity of instruction. Since the graduate intern is often seen by both the students and parents as a regular faculty member, when a parent asks his/her child, “What happened in school today?” the often response of “Nothing, we had a substitute” has been mitigated significantly.

The graduate student is not required to complete his/her graduate degree studies during the same academic year as his/her one-year internship. The money remains in an account at the university for the individual to draw against as he or she continues graduate studies. Any balance remaining upon completion of the degree is issued directly to the intern. While this often doesn’t occur, there are situations when an individual joins the substitute internship program midway into their degree studies (after having paid for several courses on their own) or if matriculated at a state school, the stipend more than covers a graduate degree. One of the universities actually issues a small stipend to the individual, which, if nothing else, defrays transportation and textbook costs.

Now that many universities in Connecticut have a formal graduate intern program, there are graduate seminars as part of the academic studies. This provides an excellent networking opportunity among the graduate students who are substituting in a variety of school districts within the region. They can share experiences and learn from each other. The weekly meetings bring together “best practices” from various districts.

### **What It Has Become Today**

Over the years, the significance and importance of the program

has taken on a major role within the school districts. Specifically within Fairfield Public Schools the following has occurred:

- Minimally one and up to as many as three graduate interns have been assigned to each elementary school on an annual basis.
- Each middle school has one to two graduate interns.
- The high school has had one permanent substitute assigned to each of the three houses.
- At the secondary level there is an intent to balance the academic background across the curriculum so there is an availability of different subjects to suit different substitutes' talent.
- At least one intern serves as a first-called building substitute.

Some situations that support this graduate internship program beyond that of substituting include:

- Library Media Center Assistant; particularly effective if the intern is majoring in a Library Media certification program.
- Teaming with a grade-level of teachers where class size is large, but not significantly large to the level of justifying an additional teacher. The intern generally works with small groups of students, but then steps in as a substitute when one of the team/grade level teachers is absent.
- Once confidence is gained by the administration and the individual graduate intern substitute, they often will be invited to take on a long-term sub assignment. This sometimes is a more stable setting for the substitute, provides the administration a "better look at" the prospective teacher candidate and generally saves the district significant money because long-term substitutes are often paid a higher rate than a day-to-day substitute.
- Technology/Computer Lab Assistant; particularly valuable for individuals pursuing a certification and/or Master's Degree in Computer Science.
- A Special Education setting is particularly appropriate for individuals pursuing a certification and/or Masters in Special Education and can be more effective than a non-trained paraprofessional.
- Other varying assignments that augment the instructional program and/or special situations provides an excellent learning setting for many graduate intern/substitutes. Some examples include:
  - Science Department assistant
  - Reading group(s) instructor
  - Assistant with inclusion students
  - Tutor/remedial work
  - Instructor for gifted and talented students

During the period of the 1980's, school districts were in a

“downsizing” mode due to declining enrollment and a difficult economy. In fact, teacher training programs were not often a sought after field of study. The Graduate Internship’s appeal dipped during that period. Its interest, though, was once again inspired in the mid to late 1990’s by the surge in enrollment and the need to seek quality substitutes. The universities have always had a continual need to recruit prospective graduate students. During a tight hiring market, there are a number of certified individuals pursuing a Master’s degree. When it becomes difficult to gain a teaching assignment, many graduate substitute interns are unemployed certified teachers. They hone their teaching skills by serving as substitutes while pursuing a Master’s degree. Think what a quality pool of substitutes this makes available for school districts!

At the conclusion of a school year, the substitute intern is on the doorstep for consideration as a prospective hire. The individuals have been mentored, trained and observed for one full year. They have substituted for a minimum of 130 days in a school year, with many approaching the 180-day full year. Many will have done a long-term assignment. While not a guarantee, most are offered a contract to teach the following year either in the district they have served or in a neighboring community. This active experience serves them well in seeking a contracted assignment.

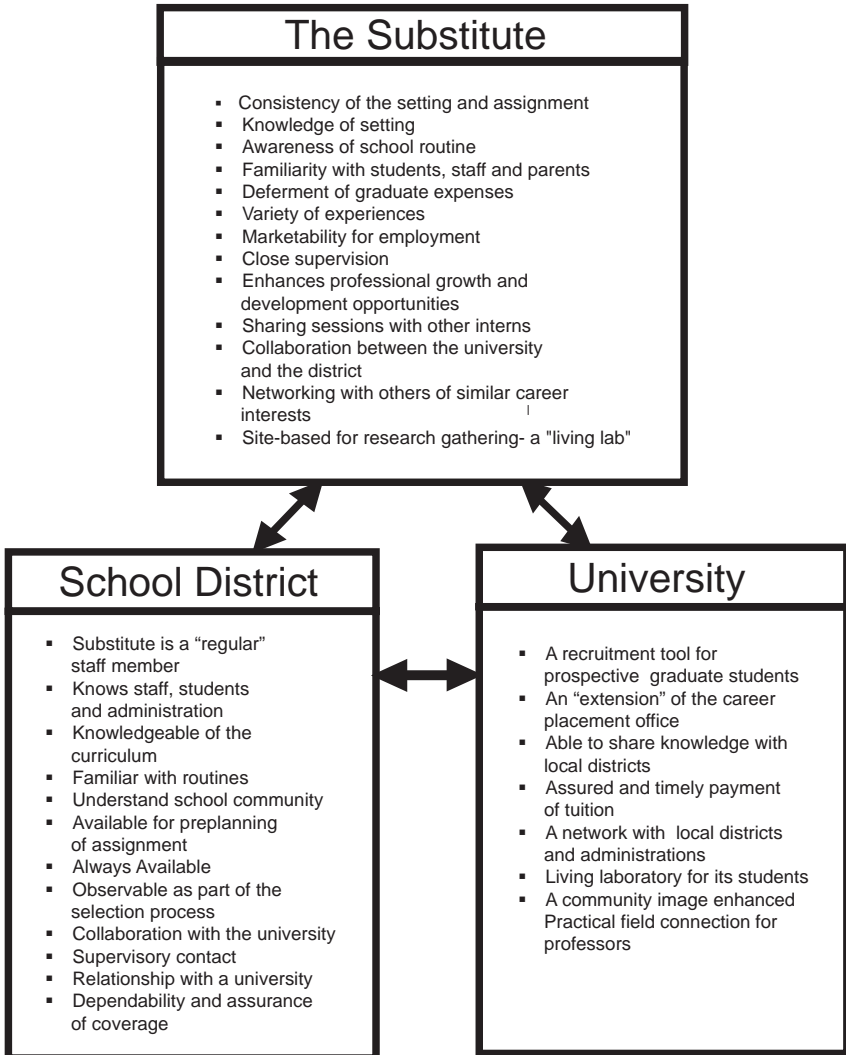
The stipend amounts of substitute graduate internship programs, that have flourished in this area, are outlined in the following table:

<b>UNIVERSITY</b>	<b>No. of Interns</b>	<b>No. of School Districts</b>	<b>1999-2000 Stipend Year/ Day</b>
Fairfield University	20	6	\$8,000/44.44
University of Bridgeport	222	63	\$8,640/48.00
Sacred Heart University	151	94	\$8,500/47.22
University of New Haven	200	36	\$1,800/10.00
Quinnipiac	36	12	\$7,900/43.89

As we move into the year 2000, the availability of graduate substitute interns has waned because of the increased availability of teaching assignments. The up and down market needs will continue, but the program is solid and will remain as an important component within the operation of participating school districts. Everyone likes a winner!

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## Everyone Becomes a Winner



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# From the Peaks in Park City, Utah

*By Kevin R. Jones*

This article features results of the 1<sup>st</sup> Annual SubConference: A National Conference on Substitute Teaching. “Best Practices in Managing Substitute Teaching” was the focus of a two-day conference hosted by the Substitute Teaching Institute from Utah State University (STI/USU). Held in the picturesque town of Park City, UT, home to several venues of the 2002 Winter Olympics, 22 experts in education and human resources met to discuss “what works and what doesn’t” concerning practices and policies relating to substitute teaching.

According to a recent nationwide survey conducted by STI/USU, substitute teaching is a growing concern in over 90 percent of school districts nationwide (Dorward & Jones, 1999). Demands in professional development, along with a robust economy, are exacerbating the increasingly critical shortage of qualified substitute teachers (Weiss, 1999). Considering that approximately one year of a student’s kindergarten-through-high school education is spent with a substitute teacher, providing safe and effective substitutes to fill-in for absent teachers is vital to mandated educational goals (Smith, 1998).

Recruiting, screening, training, evaluating, and retaining substitute teachers, along with teacher absenteeism, headed the list of topics discussed. Dialogue was fierce, but friendly as participants debated the legal, ethical, and practical implications of former, present, and potential practices within their districts, which ranged in size from a few hundred to over 150,000 students, and represented geographic regions from Alaska to Florida.

## **Recruiting**

Skillful recruitment is paramount in establishing or enhancing a competent substitute teaching pool. Maintaining a sufficient number of qualified substitute teachers is vital to ensuring that schools are always fully staffed and that educational continuity is maintained. Presently, with a robust economy and low unemployment rate, recruiting substitute teachers is becoming increasingly difficult (Weiss, 1999).

By exploring diverse sources, expanding innovative advertising, engaging alternative methods, and exercising novel incentives, districts can discover effective means to resolve the critical shortage of qualified substitute teachers.

-Sources-

In addition to former and future teachers, districts should

consider exploring diverse sources (Searcey, 1997). Not only will this give districts a considerably larger pool to draw from, but students may also benefit from being exposed to a variety of backgrounds and cultures. Further, through association with the schools, outside groups and individuals gain a greater understanding and appreciation for educators and education.

Ideas for potential sources

- Service organizations, e.g., Kiwanis, Sertoma, Rotary, Jaycees, Lions, etc.
- American Association of Retired Persons (AARP) and other retirement groups
- Retirement communities and Senior Centers
- PTA's, PTO's and other school support groups
- Chambers of Commerce and other business organizations
- Colleges and Universities - professors and students, including those outside of education
- Professions with shift work, e.g., doctors, nurses, police officers, fire fighters, etc.
- Political and religious groups (solely for purposes of goodwill, NOT campaigning or proselytizing)
- Special interest groups, e.g., historical societies, bird watchers, kennel clubs, square dancers, etc.
- Youth organizations, e.g. Girl / Boy Scouts of America, YMCA, 4-H, etc.

-Advertising-

Few, if any, districts enjoy the luxury of having a completely ample pool of fully qualified substitute teachers (Smith, 1998). Exploring innovative means of advertising will often increase not only the number of applicants, but also help in selectively recruiting substitutes with certain qualifications to fill specific needs within a school or district (Sorenson, 1999).

Suggestions for advertising approaches

- Local and regional newspapers
- PTA newsletters
- School and District newsletters
- Notes / flyers sent home with students
- Local area radio, TV, and cable
- District / school Internet
- Bill boards and community banners
- Bus and taxi placards
- Signs / banners hung on school buses and parked in specific target areas
- School marquees
- Flyers posted throughout the district, e.g., hospitals, colleges, supermarkets, department stores, etc.



-Methods-

Districts must compete not only with a robust economy, but with other districts as well. Working together, school and district administrations and personnel / human resource directors can be proactive in engaging alternative methods and strategies to recruit potential substitute teachers (Sorenson, 1999). This confluence of ideas will often result in greater commitment and success than is generally experienced when substitute teacher recruitment is left to a single individual or department.

Alternatives for recruitment methods

- Offer professional development (training) for substitutes
- Use professional staffing services, e.g., Kelly™, OPIS™, SOS™, Manpower™, ADECO™, etc.
- Submit articles to local publications
- Promote celebrity / VIP tours of schools
- Host open houses at schools / districts offices
- Form a consortium of school districts (one substitute pool for several districts)
- Involve local media (news items, public profiles, interviews, etc.)

-Incentives-

Incentives can be a dynamic recruitment tool. Ascertaining what motivates an individual to become a substitute teacher will provide a basis for the development and use of effective incentives. Wages and other monetary compensation are obvious enticements for employment. They also strain fiscally strapped district budgets. Creative methods of compensation for substitutes can increase substitute teacher pools without increasing district expenses (Peterson, 1991). Further, many viable incentives may be obtained outside the district coffers in the form of business / community partnerships or non-monetary incentives based on the building of personal worth (Sorenson, 1999).

Potential incentives - district provided (little or no cost)

- College credit for substituting
- Teacher / district credit for time served substitute teaching
- Email / Internet access
- Awards / recognition for outstanding service
- Preservice / inservice training
- Inclusion in staff / faculty meetings
- Various pay structures, e.g., weekly pay, deferred pay, lump-sum pay, etc.
- Alternative compensation, e.g., substituting in exchange for comp days or earlier retirement

Potential incentives - community-based (little or no cost to district)

- Coupons / vouchers at local stores, restaurants, theaters, etc.
- Flowers, candy, baked goods, gift baskets, etc. for distinguished substitutes
- Temporary use of a car, big screen TV, maid service, etc. for sub-of-the-month
- Accommodations at hotel, motel, bed & breakfast
- Community recognition, e.g., awards, certificates, media announcements.
- Letter from mayor, city council, chamber of commerce, etc.

### **Training**

Training is the fundamental core of a district's ability to create a vigorous substitute teacher pool (Smith, 1999). It is a viable tool for both recruitment and retention. Put simply, trained individuals are more willing to substitute and less likely to leave. Further, any worthy investment in substitute teacher training benefits both the students and the substitutes. Continual instruction focusing on the best teaching techniques creates strong educators who enter a classroom enthusiastically and are prepared to teach. Learning is the window to knowledge, and knowledge is the door to opportunity.

Although learning can be accidental, training seldom is. With a little investigation and preparation, a meritorious training program can be arranged for substitute teachers; and it does not need to be expensive or complicated. But good training does need to be ongoing and supported by good resources (Purvis, & Garvey, 1993). An effective substitute program should include both pre-service and inservice instruction, along with establishing both personal resources for the substitute and outside resources for the substitute teaching program. Substitute teachers have training needs similar to permanent teachers. According to Potter (1995), "Training for subs should be as serious as it is for regular teachers" (p. 1).

#### **-Pre-service-**

Prior to a substitute first entering the classroom, it is imperative that s/he receives initial training (Potter, 1995 & Purvis, 1991). Pre-service training is characterized as the orientation of the substitute to the district's policies, along with basic skills necessary to function in the classroom. The depth of pre-service training is often determined by funding and district policy. But, districts get what they pay and plan for. More extensive pre-service training produces substitutes that are more successful because they possess more of the needed skills to teach children both effectively and affectively.

#### **Major considerations for a pre-service training**

- Attendance by principal or other administrative representative
- Discussion of district policies and procedures
- Distribution of handbooks – with map and calendar
- Finalization of any employment paperwork

- Explanation of roles and responsibilities - substitute, school, & district
  - Provisions for additional training opportunities
- In-service-

Once a substitute has been hired within a district, continuous training is needed to consistently increase her/his skill level. Ongoing training not only improves the quality of the education that occurs in the classroom, but fosters better relationships between substitutes and students (Longhurst, 1999). Resources for this training can be professional organizations or programs, exemplary permanent teachers, and outstanding experienced substitute teachers. Observation, shadowing, and mentoring can also augment training, with any information gathered being shared/discussed with the substitute (Sorenson, 1999).

Topics for inservice training

- Classroom management
- Discipline strategies
- Effective instructional strategies
- Special needs students
- Diversity and inclusion
- Legal requirements – including confidentiality
- Super sub pack (essential supplies and instructional resources in a portable container)

-Substitute resources-

In addition to adequate training and orientation, it is imperative that substitute teachers are also equipped with material resources, helpful ideas, and assignment specific information (Longhurst, 1999). Often assembled into a portable “sub pack,” these resources include objects and activities that assist the substitute teacher to run an effective and enjoyable classroom when minimal input from the regular classroom teacher is provided. Basic materials and procedural activities, both adaptive to a variety of subjects and grade levels, provide the substitute a means to establish excellent levels of instruction and on-task behavior. By maintaining a diversity of plans and materials, substitutes, like their permanent teacher counterparts, are better able to select activities that best meet the specific needs of individual classrooms and children (Jones, 1999a).

Recommended substitute resources

- School emergency kit
- Ready-made lesson plans
- Books, tapes, and videos of instructional methods and classroom management
- Teaching / learning supplies – pencils, crayons, calculator, note pad, etc.
- School / district lists of available resources

- Addresses and phone numbers – including school/district contacts
  - List of school procedures – fire drills, assemblies, hall passes, etc.
  - Copy of school rules and district policies
  - Personal supplies – snacks, medication, grooming / hygiene
- Outside Resources-

The use of outside, or auxiliary, resources can infuse global ideas, materials, contacts, and plans into district training (Sorenson, 1999 & Peterson, 1991). These other sources are often used for collecting innovative and diverse ideas that can be delivered locally. Combining and sharing resources with other districts and agencies can have a synergistic effect in amassing an effectively large and successful central resource pool (Sorenson, 1999). Training in the use of these resources can occur exclusively within a single school, or expanded to include the district and community.

Potential outside resources

- PTA's and PTO's
- County educational services
- Vocational / technical schools
- College credit courses
- University departments
- Parent training organizations
- Religious organizations\*
- Various advocacy and interest groups\*

\* *exercise due caution*

## Screening

Screening provides an opportunity to identify and assess professional and innovative individuals capable of positively influencing the lives of students. Further, it is a necessary tool to ensure that potential employees meet state and district qualifications. School districts typically employ four basic components of screening – prescreening, paper & pencil screening, interview, and background check (Sorenson, 1999). It is axiomatic that districts will employ these components apropos to their own unique needs and circumstances.

-Prescreening-

Prescreening saves time and money for both the applicant and the district representative. Prescreening is not intended to determine the teaching qualities of an individual, but simply to determine if the applicant is employable and thus eligible to continue further in the hiring process (Jones, 1999b).

Some potential prescreening questions:

- Are you a citizen of the United States of America?
- Have you ever been convicted of a felony?

- Can you provide proof of education/training?
- Do you have any relatives that work for the district?
- Do you have a touch-tone phone (compatible with automated calling systems)?
- Can you provide an employment record (continuous for three-plus years)?

-Paper & Pencil Screening-

Following prescreening, to determine eligibility, the paper & pencil screening is the beginning of the quality assessment of an applicant's substitute teaching abilities (Sorenson, 1999). Like the prescreening, the paper & pencil screening should not be cumbersome; it should be designed for quick and easy implementation and evaluation. The competencies being checked for will aid the district in imputing a probable level of success in the classroom. Where applicable, information provided by the applicant should be verified during a background check.

Characteristics of an effective and efficient paper & pencil screening process:

- Short – less than 20 questions (use yes/no or multiple choice-type questions – those easily scored by a computer)
- Self-administered or computer administered (minimal monitoring required)
- Easily evaluated with a pass/fail or “cut” score
- May include writing sample, math sample, computer skills sample, etc.

-Interviews-

Interviews allow the district the opportunity to identify those intangibles that are not readily apparent via prescreening or paper & pencil screening, but are often critical for a substitute teacher (Ramirez, 1996). The format of the interview may be one-on-one, a group setting, or even a telephone/teleconference. Lasting approximately ten minutes, the actual interview should be quick and simple for both the applicant and the district representative(s). Information obtained during the interview should be compared with the prescreen and paper & pencil screening, and verified during a background check (Sorenson, 1999 & Jones, 1999b).

Key considerations of an interview may include:

- Professional appearance
- Communication skills
- Problem solving skills
- Interpersonal Skills
- Positive interactions

-Background Check-

A thorough background check is often the most expensive and time consuming component of the entire screening process

(Sorenson, 1999); for these reasons, it is typically reserved for only those applicants that have successfully passed the prescreen, paper & pencil screen, and interview. The background check helps ensure the applicant's suitability for employment and validates information provided during the previous screening activities. Three major components of a background check include: 1) personal and professional references; 2) medical clearance; and 3) criminal records. State law, district policy, past practice, and professional judgement will determine the extent of the check.

A background check may include, but is not limited to:

Personal/professional

- Character references
- Previous employers
- Previous jobs with student contact
- Principal's or educators' reference

Medical clearance

- Doctor / medical clearance
- Self-report form
- Tuberculosis testing
- Drug / alcohol testing

Criminal records

- Local
- State
- FBI

Note: It may be possible for districts to interface with police agencies in a cooperative effort; this will provide a more timely (and less expensive) return on information.

### **Teacher Absenteeism**

The single most obvious need for substitute teachers is wrought by teacher absenteeism (Kawa, 1996). Not only is this costly to the district in terms of ongoing teacher salaries and substitute teacher wages, additional funds are exacted via overhead incurred by human resources / administration in maintaining sufficiently adequate substitute teaching pools (Pitkoff, 1993; Scott & Wimbush, 1991).

But the true cost of teacher absenteeism may exceed immediate monetary considerations. There is a close correlation between teacher attendance and student achievement (Schultz, 1998; Scott & Wimbush, 1991). Put simply, high teacher absenteeism negatively impacts individual and classroom performance. Further, overall school morale, including staff and faculty, also suffers when teachers frequently find cause to be away from their primary duties as classroom educators (Pitkoff, 1993).

Unlike substitutes, who are "at will" employees, permanent teachers' employment is more stringently governed by contracts and policies (Longhurst, 1999). Additionally, there is more extensive and

frequent interface between permanent teachers and local administration since these regular teachers are in the classroom on an ongoing daily basis. Addressing the issue of teacher absenteeism can be complex and volatile. School boards, district personnel, and local building administrations must all work together in negotiating contracts, establishing policies, and creating working environments that will encourage teachers to remain in the classroom (Longhurst, 1999).

Principals are the key

- Be a “link” in the call-in procedures for absences
- Regularly review printouts / data on absences
- Promote school-wide enrichment
- Help avoid teacher isolation / loneliness
- Take an active role in greeting returning teachers

Contract issues

- Avoid a “use or lose” approach to leave / sick days
- Package / market leave days like an insurance/disability policy
- Provide good attendance incentives
- Limit the number of personal/leave days used at any one time
- Provide options for “left over” leave / sick days
- Negotiate provisions for dealing with abuse of leave / sick days
- Require, when warranted, documentation for absences (medical / legal)
- Eliminate ANY / ALL incentives to be absent

School districts and individual schools must cooperate in coordinating efficacious practices in the governance of substitute teaching and teacher absenteeism (Jones, 1999a). A synergistic effect takes place when districts work together with building administrators in aligning goals, seeking resources, and establishing policies (Smith, 1998).

School / district policies

- Coordinate staff development calendar away from school hours
- Ensure that sponsorship of student activities does not increase teacher absenteeism
- Include attendance as part of the evaluation process
- Eliminate automated call-in devices - report to a live person
- Track / report all absences to administration

Work environment

- Create an atmosphere that reduces stress / burnout
- Have an open door policy to air grievances and seek solutions
- Build a “team” atmosphere – everyone is needed and important
- Improve support and training for teachers
- Develop fitness and nutrition programs
- Provide after-school care for teachers’ children

Other incentives

- Use money saved from reduced absenteeism for plaques, awards, and other recognition
- Conduct a lottery, with prizes/awards from the community, based on fewest absences
- Install a “suggestion box” for novel ways to reward attendance

### **Evaluation**

Evaluation provides an opportunity for the central office, principals, teachers, students, and the substitutes themselves to provide formative input that could impact the placement and retention of individual substitutes (Potter, 1995). Evaluation criteria can be classified under Four broad areas of concern – professionalism, classroom skills, interpersonal skills, and motivation/initiative (Sorenson, 1999). Often overlooked, evaluation is an essential element in the entire spectrum of substitute teacher management from recruitment to retention/dismissal.

#### **-Professionalism-**

“You never have a second chance to make a first impression,” rings true in substitute teaching. How a substitute dresses, behaves, and accepts responsibility influences whether s/he is perceived as an effective educator. Moreover, substitutes, as with all school personnel, are ambassadors for the school; they are part of the basis used to form public opinion.

#### **Properties of professionalism**

- Dress – appropriate for the assignment (P.E., kindergarten, debate team, etc.)
- Grooming – respectful of school / community propriety (no visible tattoos / body piercing)
- Hygiene – critical for health and sanitation concerns
- Available for assignments – dependable, on time, readily at hand
- Responsible – notifies district of problems / concerns in a timely manner
- Performs typical / routine extra duties – (lunch supervisor, hall monitor, bus duty, etc.)

#### **-Classroom skills-**

A defining element of substitute teaching, the ability to select and employ appropriate materials and methods for instruction, along with effective protocols for discipline, is essential for proper and productive classroom management. Establishing an environment that not only allows, but truly promotes learning is the hallmark of a master educator (Longhurst, 1999).

#### **Essential classroom skills**

- Follows / enforces school and classroom rules
- Deals appropriately with problems (excessive office referrals may be cause for concern)
- Adheres to established school procedures (make sure substitutes



- are fully informed)
  - Uses “love and logic” verses control and coercion to maintain classroom order
  - Respectful of school and personal property
- Interpersonal skills-

Even the best of intentions and materials are of no avail if substitutes cannot relate to their students. This interface is paramount to a successful and fulfilling substitute teaching experience for both the substitute and the class. By establishing and maintaining a positive, professional, and personable classroom atmosphere, disciplinary-related instances will diminish as student interest and involvement soars (Longhurst, 1999).

In addition to the classroom, Substitutes, like teachers, must interact with a diversity of people and settings (Jones, 1999a). Getting along with the counselors and custodians, or even the cross-country coach, may prove as consequential to exceptional instruction as implementing well thought out and detailed lesson plans. Creating a pleasant atmosphere within and without the confines of the classroom serves not only the substitute and her/his particular classes, but can help positively influence the entire school as well.

Considerations for evaluating interpersonal skills

- Positive, upbeat interactions (“You’ve learned so much” vs. “You’ve got a lot to learn”)
- Non-judgmental language (“This answer is incorrect” vs. “You missed this easy one”)
- Use of “I” statements (“I prefer tennis to soccer” vs. “Tennis is better than soccer”)
- Initiates and / or responds positively to smiles, handshakes, greetings, etc.
- Listens intently and completely before offering a response
- Does not participate in gossip, backbiting, or other slanderous ruminations
- Is not limited or confined in interactions with diverse people and settings

-Motivation / initiative-

Often what distinguishes professional substitutes from average or mediocre ones is the amount of resourcefulness that they exercise (Smith, Murdock, Jones, Goldenhersh, & Latham, 1999). It is axiomatic that districts want to recruit and retain substitutes that create positive learning environments, which promote exploration, learning, and understanding in their students. Moreover, when districts place creative and resourceful substitutes in schools, their positive “can-do” attitude can have a positive influence on other staff and faculty.

#### Indicators of motivation and resourcefulness

- Tries to learn something about students (names, likes/dislikes, school / current events)
- Regularly brings a “sub pack” to supplement lesson plans/ increase student interest
- Makes her/himself well acquainted with resource materials/ personnel (in-school)
- Uses resources and contacts outside of school (government, professional, civic, etc.)
- Knows and/or develops various applicable / effective means of lesson delivery
- Shows positive team building skills with others (esp. grade level /subject area)
- Attends inservice / other training to increase teaching skills/ proficiencies

#### **Retaining**

The critical shortages of substitute teachers demands that districts implement policies and practices that retain the qualified substitutes already in their employ (Sorenson, 1999). Through effective retention, districts can dramatically decrease the time and money consumed by recruiting, screening, and training new hires (Jones, 1999a). Further, by using substitutes that are established and experienced within a district, instructional continuity and social / professional relationships can be maintained (Longhurst, 1999).

Development of policies and practices for retaining qualified substitute teachers should be based on four major constructs: 1) recognizing substitutes as professional members of the school community; 2) promoting high job satisfaction; 3) providing competitive daily pay / salary; and 4) creating sufficiently enticing incentives (Longhurst, 1999; Sorenson, 1999, & Jones, 1999).

##### Recognizing substitutes as professionals

- Include substitutes in school culture – dances, games, yearbooks, etc.
- Awards programs
- Formal interviews with feedback
- Administrative open-door policy
- Use of individual names – not merely “substitute”
- Invite/encourage attendance at inservice and other training / meetings

##### Promoting high job satisfaction

- Match, when possible, substitutes’ skills and interests with corresponding assignments
- Establish policies that promote respectful treatment of substitutes by everyone
- Show confidence and trust in substitutes’ abilities – don’t over-

monitor

- Allow for academic freedom (within reason) in presentation of lesson materials
- Support substitutes in enforcing school rules and reasonable requests
- Assign a mentor or “buddy” to answer questions and provide assistance
- Invite substitutes to join the faculty at lunch and other social gatherings
- Ensure that the lesson plans and materials provided by the permanent teacher are complete and readily accessible

Providing competitive pay

- Must be commensurate with surrounding districts
- Should compare favorably with local business/industry wages
- Allows for compensation for increased / extended duties
- Can differentiate for amount of education/training and for length of assignment
- May be offered more frequently / conveniently

Creating incentives

- Offer, when possible, insurance and similar benefits
- Arrange for free or reduced rate training / courses through colleges / universities
- Give teacher credit for substitute service
- Provide opportunities for growth/advancement / seniority within the school / district
- Use a variety of pay incentives which may be based on several different factors
- Allow substitutes input on job assignments / placements
- Grant hiring preferences to successful substitute teachers

With over one year of every student’s K-12 education being spent with a substitute teacher, and over 90 percent of districts reporting problems relating to substitute teaching, there has never been a greater need to focus on solutions to the substitute teaching crisis. Districts and schools must address the need to increase the quantity and quality of their substitute teaching pools. Seldom are single or isolated policies and practices sufficient to remedy this dilemma. A concerted effort using an eclectic array of proven strategies in recruitment, screening, training, evaluation, and retaining, along with reduction in teacher absenteeism, is vital to insuring the continuity of effective instruction essential to student achievement and well being.

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