

## **How One District Implemented A Substitute Teacher Training Program**

*By Robert Minthorn*

Picture yourself in a classroom. Say it's in a middle school. Imagine 30 kids scattered in 35 desks. Two kids have excused absences; one is serving in school suspension; two could be anywhere. Of those who are present, most are fidgeting in their chairs. Half are talking loudly. Three or four are huddled over another's desk. Two are tossing something back and forth. One appears to be sleeping.

The teacher has called in sick. No lesson plan is in sight. You have never been in this room before, don't know any of the students or their abilities and aren't sure what time class dismisses. A loud buzz sounds over the intercom, signaling the start of a new day. You're in charge. You are one of almost 700 substitute teachers working today in Hillsborough County, Florida.

Your peers are college students, retirees, or unemployed people between jobs. Most have no previous teaching experience. You have at least a high school diploma and are 18 years of age or older as required by state law. You were given a 24-page handbook on the do's and don'ts of subbing. That's it. No education degree. No training. No before-class words of wisdom. No special advice from the principal. Welcome to the world of a typical substitute teacher.

This unfortunate scenario had been playing for several years in my school district as we struggled with limited funding. We knew we needed to develop a substitute teacher training program to better prepare our substitutes for the classroom, but just didn't have the resources to make it happen. The importance of substitute teachers to the overall educational program of a school district is often overlooked and underestimated. Since most students have substitutes for 5-8% of every school year, a strong substitute program is extremely important to students' learning (Stapczuk, 1994).

In December 1996, a newly hired substitute was accused of battering three fourth-graders. The press immediately picked up the story and pointed out that the substitute was ill-prepared for the challenges of such a job. We have always had a difficult time finding good, reliable substitutes. Few substitutes have ever had any type of teacher training. Monitoring substitute performance was almost a full time job with schools submitting approximately 500 unsatisfactory performance reports on substitutes each school year. Some of these complaints (approximately 5%), were serious enough to warrant a full investigation. In early 1997, another incident made

headlines when a substitute was accused of hitting seven students with a ruler.

Suddenly, developing a substitute teacher training program became a priority even with our limited resources. We wanted to increase the effectiveness of our substitutes and reduce the number of performance related issues. We also wanted to reduce any possible liabilities we might have. We decided to begin the design process by surveying the key people in our schools. We thought that the best, most objective way to do this was to use a questionnaire that allowed the respondents to remain anonymous. We asked the three key groups, substitute teachers, classroom teachers, and administrators, what they thought about our substitute teacher program. These are the people who make or break a program. The questionnaire we used was adapted from a format presented by Linda Billman (1994)

## **Substitute Teacher Questionnaire**

March 1997

Thanks for taking the time to complete this survey. Please answer the following questions by circling the number which best describes your opinion. Your responses are anonymous and confidential. If you have any recommendations that could improve our current substitute teacher program, please include them when returning this survey.

### **All Respondents Please Answer Items 1-9**

1. Substitute teachers are an essential part of the education process.
2. Substitute teachers should be evaluated on a regular or annual basis.
3. A district wide orientation/training program is needed for substitute teachers.
4. Substitutes are effective teachers.
5. Interested substitutes should be asked to be on curriculum committees, school improvement teams, etc.
6. Substitute teachers are professional educators.
7. Students are held accountable for their behavior when a substitute teacher is in the classroom.
8. The phrase "substitute teacher" needs to be replaced by another term. Your suggestion:
9. Substitute teachers should attend regular faculty and in-service meetings for staff members and other faculty.

### **If You Are A School Administrator Or Classroom Teacher, Please Answer Item 10**

10. When possible, I provide feedback to a substitute teacher on his performance while in my building or classroom.

**If You Are A Classroom Teacher Or Substitute Teacher, Please Answer Items 11-17**

11. Lesson plans are detailed enough to teach lessons effectively.
12. Discipline procedures are prominently displayed in classrooms.
13. Sufficient information regarding regular classroom schedules, duties, and procedures is found in classrooms.
14. Materials are easily found in most classrooms.
15. Substitutes' classroom responsibilities are clearly defined.
16. Substitutes should use lesson plans provided by the classroom teacher rather than those developed by the sub.
17. Substitutes leave adequate information regarding the day's events, lessons taught, etc.

**If You Are A School Administrator Or Substitute Teacher, Please Answer Items 18-20**

18. When a school administrator is called to a sub's classroom, it is a reflection of the substitute's management skills.
19. District policies are clearly stated in materials given to substitute teachers.
20. Substitute teachers are supported by school administrators when they have difficulties.

**If You Are A Substitute Teacher, Please Answer Items 21-25**

21. Substitute teaching is a rewarding experience.
22. I am satisfied with the level of communication I have with teachers and school administrators.
23. I am often more concerned with maintaining classroom discipline than teaching lessons.
24. Feedback from school administrators and teachers is important to me.
25. I receive adequate feedback on my performance in the classroom from teachers and school administrators.

**Answer Sheet**

Your position within the district is (please circle):

Substitute

Classroom Teacher

School Administrator

**Please use the following scale when answering the above questions....1-strongly agree, 2-agree, 3-no opinion, 4-disagree, 5-strongly disagree.....Thanks!**

- |               |               |               |               |
|---------------|---------------|---------------|---------------|
| 1. 1-2-3-4-5  | 2. 1-2-3-4-5  | 3. 1-2-3-4-5  | 4. 1-2-3-4-5  |
| 5. 1-2-3-4-5  | 6. 1-2-3-4-5  | 7. 1-2-3-4-5  | 8. 1-2-3-4-5  |
| 9. 1-2-3-4-5  | 10. 1-2-3-4-5 | 11. 1-2-3-4-5 | 12. 1-2-3-4-5 |
| 13. 1-2-3-4-5 | 14. 1-2-3-4-5 | 15. 1-2-3-4-5 | 16. 1-2-3-4-5 |
| 17. 1-2-3-4-5 | 18. 1-2-3-4-5 | 19. 1-2-3-4-5 | 20. 1-2-3-4-5 |
| 21. 1-2-3-4-5 | 22. 1-2-3-4-5 | 23. 1-2-3-4-5 | 24. 1-2-3-4-5 |
| 25. 1-2-3-4-5 |               |               |               |

## Recommendations

Questionnaires were sent to a random sample (5 percent) of our substitutes, classroom teachers, and principals. We received completed questionnaires from 35% of the classroom teachers, 70% of the substitutes, and 90% of the principals. Their responses yielded considerable information about the perceived strengths and weaknesses of our substitute teacher program. The results showed the following:

- Teachers and substitutes said detailed lesson plans were available to substitutes.
- The district expected students to behave themselves at all times, even when a substitute was on duty.
- 50% of the substitutes surveyed said they thought teaching in the district was a rewarding experience.
- A majority of substitutes said they were not satisfied with the level of communication they had with administrators. Only 25% of principals visited their substitute's classrooms each day.
- Teachers and principals agreed that substitutes should be evaluated on a regular basis.
- Substitutes didn't know much about school or district policies.
- Substitutes were unclear on procedures to follow in case of serious student misconduct.
- 80% of substitutes were more concerned with maintaining discipline than with teaching lessons.
- Most of the substitutes believed calling an administrator into the classroom reflected poorly on the sub's management skills.
- A majority of the principals said they also thought such action was an indication of the sub's management abilities.
- Classroom teachers did not consider substitutes to be effective professional educators.
- Substitutes stated that they rarely received feedback on their performance.
- Although a majority of substitutes said they would like to attend faculty meetings and in-service training, fewer than 20% of the teachers indicated they wanted the substitutes present at such meetings.

As a next step in the process, we decided to form a substitute teacher training committee. It was important to have representation from all groups that had an interest in the outcome of the process. The committee consisted of the following:

### Principals (3)

Elementary

Middle School

Senior High

### Ass't. Principals(3)

Elementary

Middle School

Senior High

### District (3)

H.R. Director

Sub Supervisor

Staff Development

Supervisor

<u>Teachers (3)</u>	<u>Other</u>
Elementary	Substitutes
Middle School	Union Representative
Senior High	

The purpose of the committee was to make recommendations regarding program design, materials, and program delivery. The committee met for the first time in late March 1997. The agenda of the first meeting included: 1.) Introduction of the committee members, 2.) Overview of the purpose of the committee, 3.) Overview of the district's substitute teacher program, 4.) Review of the substitute teachers' handbook and orientation materials, 5.) Review of the literature, and 6.) "Brainstorming" activity.

At the time the committee began to meet, our school district had approximately 9,500 teachers, 1,625 substitute teachers, 175 schools, and 172,000 pupils (K-Adult). We were using an average of 678 subs per day. Approximately 66% of our subs had bachelor degrees but less than 5% had been trained as teachers. The other third of our subs had at least 60 semester hours of college credit.

Our task of reviewing the literature was difficult because we could not find much on substitute teacher training. What we did find did not really tell us anything we didn't already know, but it at least reinforced our beliefs. The following articles were reviewed:

1. Manera, Elizabeth S., "A Training Model for the Substitute Teacher," Contemporary Education, Summer, 1992.

This article reviewed a 1989 study of the Association of Teacher Educators. The job of the substitute teacher has become more important as teachers are missing more teaching days. Only 7% of districts surveyed reported that substitutes are provided in service training. The study recommends training be implemented on two levels: (a.) district/substitute and (b.) school/teacher.

(A.) The district should implement a plan with guidelines and framework for initial and yearly substitute training, monitoring, and evaluation of performance.

(B.) The principal should have an orientation for school personnel covering the schools responsibility to subs including: a. map of school, b. bell schedule, c. sign in/out procedures, d. parking information, e. emergency procedures, f. school policies, g. attendance procedures, h. who to report to for questions/problems, and i. substitute responsibilities.

The key person in the success of the substitute is the regular teacher. The teacher's responsibility to subs includes: lesson plans, materials, seating charts/gradebook, preparing the students, classroom rules, location of needed equipment, extra duties, grading procedures, and how to handle student requests.

2. Peterson, Susan, "When the Teacher Is Away," microfiche ED336371, 1991.

This article looks at a school district in Houston, Texas, that developed twenty 2-hour substitute teacher education modules (STEMS). Substitutes may earn an additional \$5.00 per day by completing 12 of the 20 modules. All substitutes are provided with some in-service training and are given handbooks. The school district also developed a school wellness program and provided monetary incentives to reduce teacher absences.

This article also looks at a school district in Greenbrier, Arkansas. They developed a 2-day substitute training program. Topics covered include: classroom management, instructional techniques, legal implications, and a teacher shadowing experience.

3. Kaufman, Scott Paul, "Are Your Substitutes Prepared for a Successful Day?" microfiche ED352312, 1991.

This article examines a professional substitute teacher institute in the Oklahoma City Schools. This institute is part of the local community college. Substitutes are required to complete courses covering: effective schools research, expectations, research based effective instructional skills, classroom management, human relations, district policy and information, learning styles awareness, and survival materials.

4. Stapczuk, Edward O., "What Makes Effective Secondary Substitute Teachers?" Literature Review, 1994.

This report reviewed research on substitute teacher effectiveness. Most students have substitutes for 5-8% of every school year. Research found that the main problems substitutes face are: ambiguous roles and unclear expectations, lack of feedback on performance, lack of collaboration between subs and the system, the subs lack of authority, and poor classroom management and disciplinary skills.

The report made 4 recommendations: (1) district's provide substitute inservice training, (2) improve recruitment procedures (interview & criteria for employment), (3) provide a handbook, and (4) provide improved lesson plans.

5. Billman, Linda Webb, "Keep Subs Afloat," Executive Educator, October, 1994.

This article looks at what a district can do to improve its substitute teacher program. "Research suggests students will have spent an average of from 91 to 104 days in a classroom with a substitute teacher before they graduate from high school. That's roughly five solid school-months in their education - no small chunk of time." The author suggests a district take stock of the current program through a questionnaire sent to principals, teachers and

substitutes. The results of such a questionnaire should show both strengths and weaknesses of the district's program.

6. Hinklemeyer, Arlene, "Beat The Bushes for Substitute Teachers," Executive Educator, August, 1988.

This article examined the shortage of substitute teachers in New York. The author concluded that many people "shy" away from substitute teaching because they do not feel that they have the skills to be successful. The author recommended the following: Increased training in curriculum, teaching strategies, classroom management, and district policies and procedures.

7. Tracey, Sandra, "Improve Sub Training With Staff Development," NAASP Bulletin, May, 1988.

This article concluded that Staff Development program should have a district and a building level link and should focus on classroom management and classroom instruction.

8. St. Michel, Terrie, "Effective Substitute Teachers: Myth, Mayhem, or Magic?" Practicing Administrator's Leadership Series, Corwin Press, 1995.

Review of 2 year study of substitute effectiveness in Arizona schools. "Substitutes are expected to perform a variety of tasks as efficiently and effectively as the regular teachers whom they are replacing." They often do not have the training to be successful in this role.

The committee then brain stormed the question "What topics should be covered in a substitute teacher training program?" The following list was compiled from that exercise:

- |                                 |                                    |
|---------------------------------|------------------------------------|
| -classroom management           | -automated call-out information    |
| -daily responsibilities         | -exceptional education orientation |
| -communication skills           | -district policies                 |
| -cultural diversity             | -confidentiality                   |
| -presentation of subject matter | -emergency procedures              |
| -effective schools research     | -positive expectations             |
| -school law                     | -blood borne pathogens             |
| -accident procedures            | -code of ethics                    |
| -sexual harassment              | -a/v operation                     |
| -crisis intervention            | -sub-central rules                 |
| -grade level orientation        |                                    |
| -learning styles                |                                    |

The committee met again in mid April 1997. The agenda for this meeting included: (1) a review of the results from the questionnaire, (2) a review of the brainstorming topics, (3) discussion to make recommendations for the training design, and (4) recommendations for the pilot training project. After discussion, the committee made the following recommendations:

-A cadre of 2-3 consultants should be contracted through the district's Staff Development Office to finalize the training design, select/create materials, and field test the program in August. All of the topics listed in the brainstorming activity would be incorporated in the training design.

-That training should consist of 2, 6-hour days in class and 1, 7.5-hour day job shadowing at a district school.

-All substitutes hired after June 1, 1997 should be required to attend the training class unless a graduate from an approved teaching training program.

-Current substitutes with satisfactory performance records should be required to complete a 4 hour training class.

-Substitute training should be offered at least twice a month.

-Consideration should be given to the creation of a new category of substitute for those with a high school diploma (and less than 60 semester hours of college credit).

-A committee should be formed to examine ways to decrease the demand for substitutes and/or increase the number of substitutes.

The committee's recommendations were accepted. Two experienced staff development trainers (a retired principal and a high school Business Education teacher/Department Head) were hired as consultants. The substitute training program was written during the summer of 1997 in collaboration with the personnel department. We began implementation of the training program in August 1997. All new substitutes were required to complete the 3 day training program as a condition of employment. All existing substitute teachers (all 1,200 of them) were required to complete the 4 hour class between October 1997 and March 1998 as a condition to remain employed. Those not completing the training by the deadline would be placed on inactive status pending completion of the 3 day training class. The following is a brief overview of the original pilot training program:

- Day 1
  - a. Overview of the school district
  - b. Sub-Central policies and procedures
  - c. Professional ethics and sexual harassment
  - d. School law
  - e. Emergency procedures
  - f. Blood borne pathogens training
  - g. Communication skills
  - h. Introduction to job shadowing
- Day 2
  - Job Shadowing
- Day 3
  - a. Teaching duties/general duties
  - b. Learning styles



- c. Positive expectations
- d. Special needs students
- e. Testing
- f. Grade level orientation
- g. Classroom management
- h. Typical problems

The 4-hour class was conducted lecture-style and covered the same topics but in less detail. So, how did it go? Let's look at the 1996-1997 school year, the year before we began substitute teacher training. During that school year, we received 486 unsatisfactory substitute teacher performance reports submitted by school administrators. Twenty-two of these were serious enough for us to conduct a full investigation into the matter. Although we did not have 100% of our substitutes trained until March 1998, the number of unsatisfactory performance reports for the 1997-1998 school year dropped 48% to 253. Only 10 of these were serious enough to require further investigation. The results continued during the 1998-1999 school year when unsatisfactory performance reports dropped another 25% to 191. Fourteen of these needed further investigation. It is evident that training has a great impact on substitute teacher performance.

As recommended by the committee, a new category of substitute was added in December 1997 in an effort to increase the number of substitute teachers available. For the first time in the State of Florida, a large urban school district allowed applicants with only a high school diploma to apply for substitute teacher positions. Since this was truly "unexplored territory," we decided to create a new 10 day training program for these applicants. The following is a summary of our 10 day training program for high school level substitutes:

#### **Session 1 (AM)**

During this session, participants are welcomed by the instructor and led through an orientation of what to expect during the 10-day training program. The orientation includes: Completing a registration form, setting up a name tent, class hours, breaks, topics covered in each session, district goals, class goal and objectives, a video about Learey Technical Center, and an overview of the classroom policies and procedures. Students interview and introduce each other in a presentation to the class. The role of the substitute is also covered during this time period.

#### **Session 1 (PM)**

This segment includes such topics as Avoiding Negligence, Professional Ethics, Confidentiality, and Sexual Harassment. Hillsborough County Public Schools sexual harassment policies

are covered. Such topics as never giving medicine to a student, never leaving students alone in the classroom, never touching a student, never keeping a student after class or after school, and not introducing controversial topics are covered.

### **Session 2 (AM)**

The expectations of a substitute during his/her day of teacher substitution are covered in depth, but in general terms. It is stressed to all participants that following the teacher's lesson plans is the 1st priority. If they can enhance the materials, that is fine, but the teacher's plans need to be followed. When and how to take attendance is covered, participants are exposed to a sample attendance form, tardy passes, and student admits. There is also a presentation on the Stages of Childhood Development, which gives an overview of each stage the child goes through and what is occurring during these stages. There is a breakdown of the ages and school grades so that the participants will have ideas of what to expect when working with different groups.

### **Session 2 (PM)**

This session on preparing for assignments and carrying out lesson plans begins with issuing participants textbooks and giving them only 20 minutes to prepare to teach a lesson. This is a group activity and after the twenty minutes, the group delivers the lesson to the rest of the class. This is a very fast lesson on stressing the importance of preparation. Also covered during this time, is how to enhance a lesson, rather than just having students read the chapter, answer the questions at the end, and define the vocabulary words. At this point, participants are introduced to the Substitute Teacher Handbooks from Utah State University. A Scavenger Hunt activity is used to acquaint participants with these handbooks.

### **Session 3 (AM)**

This session explores ways to effectively interact with others by understanding behavioral styles. A combination of several theories is presented including: psychogeometrics and the Gregoric Style Delineator. Interpersonal skills are combined with these theories. The video, "Do Right" by Lou Holtz is shown. In this video, Lou Holtz expresses his lifelong philosophies: Human Relations Rules, 1) Do what's right, 2) Do your best, 3) Treat others as you would like to be treated and Universal Questions, 1) Can I trust you?, 2) Are you committed to excellence?, 3) Do you care about me as a person?

### **Session 3 (PM)**

In this communication skills and listening session, topics include barriers to hearing, message overlap, rate of delivery, voice

quality, belief barriers, loaded words, preferred intake mode, and how to handle distractions.

**Session 4 (AM)**

A guest speaker covers such topics as Learning Styles, Right Brain/Left Brain Activity, Teaching to Special Students, and Active Learning.

**Session 4 (PM)**

The topic of working with students who have special needs is covered, and special teaching methods are introduced. Also covered in this session is Copyright Laws pertaining to teachers. Participants are prepared for their job shadow experience on the following day. There is an orientation to proper attire and grooming. Participants are given an assignment for their job shadow experience, which they will deliver on Session 5.

**Session 5 (AM)**

Job shadow in a school.

**Session 5 (PM)**

Job shadow in a school.

**Session 6 (AM)**

Each participant presents a short presentation about his/her job shadowing experience. Such topics as what they observed and want to know more about, things they didn't understand, and effective vs. ineffective teacher behaviors. Techniques on avoiding discipline problems and discipline strategies are also presented during this session.

**Session 6 (PM)**

Topics covered during this session include handling students with special needs, aggressive behavior management, and crisis intervention. Classroom policies and procedures are presented through the use of Harry K. Wong's "The Effective Teacher" videotape 3 (Discipline and Procedures).

**Session 7 (AM)**

Classroom management is continued during this session with the use of Harry K. Wong's "The Effective Teacher" videotape 4 (Procedures and Routines).

**Session 7 (PM)**

Questioning skills is the topic for this session. Participants are exposed to open-ended and closed-ended questioning techniques. Questioning for higher student performance is also discussed. Participants practice questioning skills.

**Session 8 (AM)**

During this discussion on cultural diversity and stereotypical thinking, participants are exposed to differences in the classroom

and are provided with “tools” for improving performance and interaction skills to use in a multicultural setting.

**Session 8 (PM)**

Participants are given time to develop activities that would enhance a lesson that a teacher may leave for the class or when there is, for one reason or another, no lesson plan. These activities are then presented to the other class participants.

**Session 9 (AM)**

School emergency procedures (fire drill, tornado drill, student accidents/illness), hazardous communications, and blood borne pathogens are covered during this session.

**Session 9 (PM)**

Participants are exposed to AV methods and equipment. Flip charts, 35 mm slides, handouts, video equipment and tapes, overhead transparencies are discussed. Participants are given time to develop and prepare an activity that they will use in a classroom when there is not a lesson plan for their use.

**Session 10 (AM)**

Participants present an activity to the class that they have developed. Each participant will leave the program with as many different activities as there are students. During this session, participants view the video “FISH!” There are four main concepts highlighted in FISH! These are the ingredients which make the World Famous Pike Place Fish Market an engaging environment for workers and customers alike.

**Session 10 (PM)**

This session includes an orientation and instruction on Sub Central/SEMS presented by supervisor, Mr. Robert Minthorn. The session ends with a program evaluation completed by each participant and certificates issued by the instructor.

So how have high school level substitutes performed? The number of unsatisfactory performance reports for high school level substitutes completing the 10 day training class has been about half the rate of what we have received for subs with 60 semester hours of college to a Bachelors degree that have completed the 3 day training class. It appears that the impact of training on performance is greater than the impact of college level course work.

Does substitute teacher training make a difference? You Betcha! Training is probably the single most important part of our substitute teacher program. Having a substitute teacher training program helps to recruit new sub applicants and provides them with the tools they need to be successful subs. If you don't have a sub training program in place, you are missing the boat!

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