

## Preparing Substitute Teachers for Special Education Settings: Ensuring the Quality and Continuity of Teaching and Learning

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In view of the opportunities that substitutes have to influence instruction, it is critical for school district personnel, school administrators, and teachers to provide substitutes with the information and skills necessary to effectively conduct classroom activities in the teacher's absence. It is estimated that over a year of a student's K-12 education may be spent with a substitute teacher (Jones, 2000; Longhurst, 2000). As a result of better sick leave benefits, release time for professional enrichment, and improved personal and family leave opportunities (McIntire & Hughes, 1982; Tannenbaum, 2000), teacher absences have increased over the years. Manera and Quinn (1991) report that in some schools students may spend up to 40% of their time with substitutes. While some progress has been made in the preparation of substitutes in general education classrooms at the elementary and secondary levels, substitutes in special education settings have not received the attention they need and deserve. To compound the problem, individuals who are not certified in the education of exceptional students are frequently called to substitute in special education classrooms. Most handbooks and guides for substitute teachers make little or no mention of special education in spite of the fact that Tannenbaum (2000) found that one of the most serious problematic behaviors of substitutes was "not understanding special education students." As demands are placed on teachers to improve students' academic performance, instructional time must be maximized (Manera, 1992), and the quality and continuity of teaching and learning must be ensured in the absence of the teacher. For students in special education settings who may have academic, behavior, or social skill difficulties, poor attention and memory or inadequate organizational skills, *there is no time to waste*.

Special education refers to specially designed instruction that meets the unique needs of exceptional students (Hallahan & Kauffman, 2000). Students with disabilities frequently need to have instruction adapted, materials modified, and accommodations made in order for learning to occur. Because special education *teachers* receive special training and information to direct the learning environment for students with special needs, so should special education *substitutes*. This article provides suggestions for equipping special education substitutes with the information they need to function effectively in the special education setting and offers specific recommendations to be implemented by school districts, schools, and teachers.

## **The Roles of School Districts**

“Before districts can improve their cadre of substitutes, there must be some type of staff development offered to assist them” (Manera, 1992, p. 288). When they participate in staff development activities, substitutes should be paid at least at their normal rate. Some districts actually increase the pay for substitutes who have participated in training (Peterson, 1991; Tannenbaum, 2000). Other districts award inservice points to teachers who participate in the preparation of substitutes (Purvis & Garvey, 1993). School district special education departments may want to collaborate with special education departments within nearby universities to provide professional preparation sessions for special education substitutes. This type of collaboration may help districts add to their pools of substitutes by attracting college students in teacher education programs.

Substitutes should receive initial training (Potter, 1995; Purvis, 1991), but must also be given ongoing, continuous preparation and training (Jones, 2000). Similar to staff development for teachers, in order to be effective, initial staff development must be followed up with additional sessions and support for implementation. Staff development trainers/presenters may include district special education personnel, special education teachers and substitutes, and special education university faculty. Preparation and training may be enhanced by having substitutes observe exemplary special education teachers and substitutes either in person or on videotape and by assigning them a mentor. Staff development sessions should include, but not be limited to, the following:

- Orientation to the district, including policies and procedures, and a map indicating the location of special education classrooms throughout the school district.
- School district and university organizational charts, including telephone numbers for special education resources and key personnel within the district and university.
- Description of service delivery options and the responsibility of the substitute within each type of setting (e.g., self-contained classroom, resource setting, inclusion classroom), along with strategies for teaching within each setting.
- Information about students with special needs, including legal issues, particularly as they affect provision of services to students with disabilities.
- Professional development sessions in research-based instructional strategies, classroom management, the adaptation of instruction and modification of instructional materials and critical teaching behaviors (e.g., use of positive reinforcement, specific praise, proximity control, motivational strategies, comprehension checks, monitoring of progress, elaborated feedback, and appropriate instructional language).

## The Roles of Administrators and Individual Schools

School administrators and other school leaders (e.g., department heads, program coordinators, curriculum coordinators, assistant principals, guidance counselors) play a key role in facilitating the success of special education substitutes and all substitutes. Just as special education teachers communicate the expectations for their classrooms, school administrators and other school leaders communicate expectations and set the tone for their school. Their expectations for teachers include providing thorough, well-organized information and materials for substitutes, and their expectations for substitutes include implementing the plans and procedures provided by the teacher to ensure the quality and continuity of teaching and learning in the special education setting. In order to ensure uniformity of procedures and materials, some schools actually provide staff development sessions for teachers to assist them in the development and organization of materials to leave for a substitute (Purvis & Garvey, 1993).

School administrators should include special education substitutes in school faculty and special education faculty meetings, orientations at the beginning of the school year, and in ongoing professional development activities throughout the year. This inclusion of substitutes in ongoing professional development and informational activities lets substitutes know that they are valued members of the school community. It may also enable the school to establish a pool of special education substitutes who might agree to substitute regularly in the school and mentor new special education substitutes. Substitutes could also be included in holiday parties, school plays, fairs, and other special events, and an end-of-the-year celebration for substitutes and school volunteers. At the minimum, school administrators and other school leaders should:

- Welcome, orient to the building, escort the special education substitute to the classroom, and introduce the substitute to key school personnel.
- Ensure that a notebook entitled, *Substitute Teacher Information*, as well as lesson plans and other needed materials, including students' schedules, have been left by the special education teacher.
- Provide a map of the school with each area of the school used by the special education students and teacher highlighted for clarity.
- Supply the substitute with a copy of the school's handbook of policies and procedures, including substitute teacher policies; emergency procedures; attendance procedures; and lunch, bell, bus, playground, and dismissal schedules.
- Provide a list of faculty by grade level, subject area, or specialty, along with their room numbers.
- Share with the substitute the year's schedule of meetings and professional development sessions planned for the school's special education teachers and invite the substitute to participate.
- Visit the substitute periodically during the day to offer support and answer questions.

- Meet briefly at the end of the day to express appreciation, collect feedback, and debrief.

### **The Roles of Special Education Teachers**

The teacher is instrumental in determining the success of the substitute teacher (Purvis & Garvey, 1993), and it is in the best interest of the teacher to thoroughly prepare and organize the learning environment for a substitute. Therefore, the primary role of the special education teacher is to provide information for substitutes to enable them to administer and execute *all* aspects of the special education program effectively. This can be accomplished by organizing and structuring essential information in a clear and concise way that the special education substitute will find easy to follow. The information should be placed in a notebook, displayed in a prominent place on the teacher's desk, and labeled *Substitute Teacher Information*. As they prepare the notebook for their substitutes, special education teachers should design procedures for the type of class they teach (e.g., self-contained/full-time classes, resource room settings, or consultative and co-teaching services in general education classrooms). The information in the notebook should be organized by a table of contents with a brief annotation describing what is included within each section. In this way, the substitute can see at a glance which topics are included and where they can be found. Index tabs should divide the notebook into separate sections, each marked with one of the six major areas (e.g., classroom procedures). This format allows the substitute to focus initially on the information thought to be most essential and then locate additional information as needed. For example, the substitute's immediate interest may be in locating the plans for the day and the classroom rules. Later on, if a question arises on a topic, such as how to grade students' work, the substitute can check the table of contents and locate the section on grading.

The following suggestions are provided as basic guidelines in the areas of policy information, student information, schedules, classroom procedures, daily plans, and survival strategies. The substitutes who utilized this information in a resource room over a 4-year period commented positively about the schedules, individual student plans, the ease of locating materials, and the explanations of the management systems and classroom rules.

#### **Policy Information**

- **Map of school.** Provide a diagram of the building for the substitute.
- **Teacher to contact in case of problems.** Supply the name of another teacher, preferably someone in close proximity, in case of problems, questions, or an emergency. If the class is located outside the school building in a portable building, leave instructions about how to call the office or otherwise obtain assistance.

- **Emergency procedures.** Provide a map or diagram illustrating emergency procedures for fire drills, storm warnings, bomb threats, and other emergencies. Leave a class list and instruct the substitute to take it along when leaving the room to ensure that all students have been safely evacuated.

### **Student Information**

- **Dependable students.** Leave the name of one or two dependable students to help the substitute with questions, concerns, and unanticipated situations.
- **Medical problems or other special circumstances.** Describe any medical problems or unusual behavior of students. Provide directions for dispensing medication as well as procedures to follow in the event of a medical emergency.

### **Schedules**

- **Teacher's duty schedule.** Include a schedule of the special education teacher's required duties (e.g., lunch, playground, and bus duty).
- **Paraprofessionals'/volunteers' schedule.** Provide a list of the paraprofessionals or volunteers who assist the special education teacher along with an explanation of their duties and the times they will be present in the classroom.
- **Special teacher schedule.** Supply the substitute with a list indicating the days and times that the media specialist, speech/language pathologist, physical therapist, art, music, and physical education teachers or other specialists who will be involved with one or more students in the class.
- **Irregular dismissal.** Some students with disabilities do not spend the entire school day in class. Some arrive late, and others are dismissed early. Provide the substitute with the time of each student's arrival and dismissal and where the student should wait during transition. Also indicate the method of transportation.
- **General education schedule.** Some students with disabilities spend part of their day in the general education classroom (i.e., inclusive setting). Provide information about where each student receives instruction for each part of the day. At certain times of the day, the special education teacher may also spend time in general education settings providing consultative services or co-teaching with general education teachers. Describe these times, locations, and responsibilities.
- **Multilevel Learning Center schedule.** Provide a schedule indicating the times that students are allowed to work in learning centers along with their assignments at each center.

### **Classroom Procedures**

- **Seating chart.** Substitutes have better control and fewer disci-

pline problems when they can call students by name. If a chart containing names of students and where they sit is not used, desks or work containers should be labeled with students' names. When a seating chart is used, it is helpful to include a picture of each student next to the name, along with his or her age and grade.

- **Attendance record.** Leave a list of the members of the class with instructions about how and when the attendance should be reported to the office. In a resource room, attendance may be taken throughout the day. For each student in a resource room, list the student's grade level and the name of the homeroom teacher.
- **Grading, charting, and record-keeping systems.** Provide an explanation of the grading system, how grades are recorded, and the way in which work is submitted and returned. For example, in many special education classes, immediate feedback is given, which means that work is checked while students are completing it or immediately afterward.
- **Location of materials.** Furnish directions so the substitute can find necessary items, such as teacher's manuals, answer keys, classroom supplies, audiovisual equipment, playground equipment, and art supplies. Also label the areas of the room in which these items are stored.
- **Classroom rules.** Post rules in the classroom so that the students can see them. Place a copy in the *Substitute Teacher Information* notebook along with accompanying contingencies for following or failing to follow the rules. Employing a system of rules will communicate teacher expectations to students and prevent problems from developing.
- **Special teaching procedures or techniques.** Describe and explain any specialized teaching method not typically used in a general education classroom setting. In the event that the teacher prefers that a substitute untrained in special education methods and techniques refrain from attempting certain activities, a suitable alternative should be provided.
- **Teaching equipment/machines.** Equipment and machines not typically encountered in general education classrooms may be used in special education classrooms. In the event that a student might have difficulty with some of the equipment, the teacher can assist the substitute by taping a 3 by 5 index card with directions next to each machine or piece of equipment.
- **Computers.** Provide schedules and directions for student use of computers in the classroom.
- **Behavior reports.** In some special education classes, teachers send behavior reports home to parents describing a student's academic or social behavior during that school day. The teacher must decide whether or not to have the substitute follow this procedure. In many cases, this system may help the substitute more

effectively manage the behavior of the student(s) in question. If the teacher expects the substitute to use a home/school communication system, the procedures must be easy to understand and carry out.

- **Learning aids.** Provide a list of learning aids that are acceptable for students to use in completing tasks and activities (e.g., math manipulatives, pencil grips, calculators). Give directions regarding the conditions under which these aids are to be used (e.g., use of a calculator to check math problems) and which students are to use them.
- **Classroom management systems.** Special education teachers employ a variety of systems to maintain an optimal level of academic and social behavior in the classroom. Knowledge of these systems may be the key to a substitute's success in the classroom. Describe point systems, behavior contracts, and other types of classroom management systems along with precise instructions regarding their implementation.

### **Daily Plans**

- **Individual daily plans.** Many special education teachers devise individual daily plans for their students. These plans represent the vehicle by which the goals and objectives in the annual Individualized Education Program (IEP) will be accomplished (Olson & Platt, 2000). Individual plans provide structure for students and assist the substitute in completing the required activities in the special education teacher's absence. Place these plans in a location where the substitute and students can easily find and use them.
- **Cooperative learning.** Not all of the work in a special education classroom is done individually. Describe group activities and list the participants along with their roles and responsibilities and expected outcomes.
- **Lesson plans.** Provide plans that specify exactly what students are to do from the opening exercises to dismissal at the end of the day. Include the objectives, procedures, materials, methods of evaluation, and the time necessary for completion of each activity.

### **Survival Strategies**

- **Bag of tricks.** Sometimes the class schedule is interrupted because of an assembly, fire drill, or a delayed school opening during inclement weather. The substitute may be left with 10 minutes rather than the customary 30. It is helpful to have a "bag of tricks" for the substitute to use at these times. They could include transition activities, games, mental math exercises, brainteasers, story starters, newspaper headlines, brainstorming exercises, and problem-solving activities that are fun and motivating, yet educational (Olson & Platt, 2000).

- **Substitute's Survival Kit.** Some substitutes have learned from experience to carry with them a "Substitute's Survival Kit" containing at least one activity that is appropriate for students at each grade level (elementary and secondary). These activities are helpful when the teacher's lesson plans are not complete and also at the elementary and middle school level in filling in that awkward 15 minutes before lunch or just prior to dismissal at the end of the day. Special educators who provide such activities for their substitutes are presenting them with another way of meeting the varied and unique needs of their students.

### **The Role of the Special Education Substitute**

It is the role of the special education substitute to follow the policies, procedures, and plans left by the special education teacher and to provide feedback regarding both the students and the clarity of the information provided. Therefore, included in the notebook, *Substitute Teacher Information*, should be a form to elicit feedback from the substitute at the end of the day (see Figure 1). On the form, the substitute is asked to supply specific information related to student performance and to provide feedback about whether or not sufficient information was left for the substitute. The provision of additional comments and suggestions by the substitute regarding the information included in the notebook enables the special education teacher to further improve its contents.

### **Conclusion**

This article provides recommendations for preparing substitutes in special education through a comprehensive three-way approach by involving school district special education personnel, school administrators, and other school leaders and special education teachers. When preparation and support occur at each of these levels, it demonstrates a commitment to ensure the quality and continuity of teaching and learning in the special education setting in the absence of the teacher. Students with disabilities cannot afford to miss even one day of instruction. Therefore, it is essential that special education substitutes be provided with assistance and support so that they can maintain a structured routine and carry out the instructional program with confidence.

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Feedback From Substitute Teacher	
<p>DIRECTIONS : Please respond to the following items before you leave at the end of the day. Suggest any additional information that was not provided in the Substitute Teacher Information notebook that would assist you in carrying out your responsibilities as a special education substitute. (Please use back of form if additional space is needed.)</p>	
<p>1. Did someone meet you upon your arrival, escort you to the classroom, and answer your questions? If so, please list the name here.</p>	
<p>2. List the names of students who were absent.</p>	
<p>3. Comment on group and individual student behavior (both positive and negative).</p>	
<p>4. Indicate the individual and group work that was completed.</p>	
<p>5. Were schedules clear and easy to follow? If not, please specify problems.</p>	
<p>6. Were you able to find everything you needed in the classroom? If not, please explain.</p>	
<p>7. Were you and the students able to operate equipment satisfactorily? If not, please explain.</p>	
<p>8. Describe any unusual problems or special accomplishments.</p>	
<p>9. Would you be willing to substitute in this class again? Why or why not?</p>	
<p>10. Substitutes comments/suggestions.</p>	
<p>Substitutes Signature: <input type="text"/></p>	

Figure 1. Form to elicit feedback from substitute.

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