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ABSTRACT

Presented is the training manual used to prepare special education supervisors in a competency based and individualized 1-year program at the University of Texas. Noted in the overview are such program concepts as the role of the supervisor in instructional improvement and as an instructional change agent and the need for determining critical competencies. Discussed in the section on program goals, assumptions, and specifications; are the generic model, ways to individualize the programs, field experiences, and independent study activities. Competencies are considered in terms of definitions, evaluation of critical competency statements, the critical competency statements, distinguishing characteristics, critical competency domains, and validation of critical competencies. Examined in the chapter on the program model are basic program components, program expectations, time allocations, the formal course component, the field experience component and program relevance and use. Three instructional resources (the independent system learning laboratory, computer assisted instruction, and the management information system) are described. The assessment of trainee performance, assessment instruments, assessment sequence, and competence assessment and job expectations are discussed in the section on the competency assessment system. Appended are a list of the critical competencies (with a rationale and example of each) - a report on the national study of critical competencies, and a list of documents and materials developed by the project. (DB)

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TRAINING MANUAL

for

A COMPETENCY-GUIDED, INDIVIDUALIZED PROGRAM FOR SPECIAL EDUCATION SUPERVISORS

1972 - 1975

DOCUMENT #13

by

JOHN D. KING

in collaboration with

BEN M. HARRIS

SPECIAL EDUCATION SUPERVISORY TRAINING PROJECT

1976

Funded by BEH/USOE (IAC) 74 75 0955 to the Texas Education Agency and College of Education, The University of Texas at Austin

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OVERVIEW

As the field of Special Education has come into its own in the past decade, so too have departments of Special Education in universities and colleges throughout the country. Courses have been developed to teach many of the concepts of dealing with both children and adults who are in need of special training; formal classes and other strategies have been implemented for teaching knowledge and skills to the handicapped. As the field has grown, however, a need has developed for managing the burgeoning programs, for planning and implementing new programs, and for preparing special educators as supervisors as well as teachers. In addition, the formulation of new plans for special education in states like Texas (Texas Education Agency, 1970) has resulted in the need for new roles for special education supervision personnel.

This manual was developed in recognition of these needs. It is designed to serve a threefold purpose:

- As a reference for persons operating competency-guided leadership training programs
- As a stimulus for individuals planning and developing such new programs
- As a source book for persons in need of step-by-step procedural aids for managing a leadership training program

The Special Education Supervisor Training (SEST) project was funded by the Bureau of Education for the Handicapped, United States Office of Education, through agreement with the Texas Education Agency and the College of Education at The University of Texas. Three developmental phases were

identified for the project: (1) 1972-73 constituted the conceptual phase; (2) 1973-74 was the exploratory, prototype development phase; and (3) 1974-75, the final year, was for refinement, pilot testing, evaluation and dissemination of project materials for national use.

For this project special education supervisory personnel were viewed as the instructional leaders and agents for effecting the planned change mandated either by state legislatures or the growing tide of developments related to returning handicapped children to the regular classroom mainstream. The general purpose was to develop a training program which would equip new special education leadership personnel with the human, conceptual, and technical skills necessary to effect planned change in special education practice.

While these materials have been developed primarily for a one-year graduate program, their potential for use in in-service programs has not been overlooked. The format has been designed so that the manual and the supplementary material can be used in self-study as the basis for a continuing training system. The first three chapters of the manual concentrate on the conceptualization, issues, and problems associated with high quality in graduate training. The fourth chapter forms a transition from the conceptualization of competencies to the pragmatic stages of competency specification and utilization in the training program context. The last two chapters focus on the practical, operational components of a training program. Illustrative material includes descriptions of design, resources and evaluation, assessment models and procedures, and devices for implementation.

PROGRAM CONCEPTS AND RATIONALE

A set of concepts about the roles of instructional leaders and their training was developed to give continuity and specificity to the program and associated material. Instructional improvement as purpose, change agentry as responsibility, and competency-guided training are central to all that the project has endeavored to do.

Leadership for Instructional Improvement

Leadership competencies for all types of personnel are change oriented by definition:

> Leadership implies a unique set of adult behaviors associated with guiding people in the change process...as distinguished from "followership." (Harris, 1963, 1975).

Leadership in a planned change context implies designated, trained, and organized use of management. That which emerges in an unplanned context occurs by chance and circumstance. When leadership provides adequate guidance to the change process, emergent leadership tends to occur less frequently. It should be noted, however, that there is no conflict between the notion of planned, organized change and emergent leadership when the latter is not merely a response to lack of leadership in a crisis situation.

In educational settings leadership occurs at a multiplicity of levels and authorities. It is functional and necessary in such school-related areas as finance, management, transportation, media, and materials. However, the primary focus of leadership in education is on instruction, particularly as related to the improvement of the instructional process.

The Instructional Change Agent

Supervisors, whatever their field of practice, fill different roles and serve a variety of functions. There is, for example,

- an instructional supervisor, whose primary assignment is to work with teachers and others on instructional matters

- a change agent, who brings about changes in behavior, role, or structure for whole organizations or sub-systems for the purpose of improving instruction

- a maintenance supervisor, whose function is to perpetuate the status quo

- an administrative supervisor, who performs a wide variety of administrative tasks which still do relate to the improvement of instruction received by children. (Harris and Bessent, 1969)

The training program presented in this manual is directed primarily toward the supervisor who serves as an instructional change agent, helping teachers and others who work in special education improve their instructional approach, their teaching skills, and their managerial competencies. It is designed to prepare change-oriented instructional leaders for supervisory positions in special education in public schools and other educational settings, as well as to enable graduates of the program to meet state standards for certification as Professional Supervisors. In some cases students may also obtain a master's degree while working on certification requirements; others may have earned a master's prior to program entry.

Competency-Guided Instruction

The training program incorporates the essential features of a competency-guided educational approach into graduate-level professional preparation. Competencies are perceived as complex, on-the-job performance patterns. They are defined in this competency-guided approach to supervisor training as statements describing the demonstration of skills and knowledge for specified outcomes related to task implementation. Such statements may be written to define competencies for the completion of an entire task or any segment thereof. The complexity and variety of knowledge and skills included in various competencies varies, depending on the task involved.

The literature on competency-based education tentatively has established principles or criteria for distinguishing it from other types of instructional

design (Weber, 1973; Maxwell, 1974; Popham, 1968; Montague and Butts, 1968; Mager, 1968; Kibler et al., 1970; Houston, 1972; Gronlund, 1970; Garvey, 1968; Eisner, 1967; and Bloom, 1968). The SEST Project staff, in developing a program for supervisor certification and establishing guidelines for inservice development of leadership competence, saw a need to reexamine and possibly modify or reinterpret the competency-based principles currently employed in many programs. The principles adopted by SEST evolved during the developmental phases of the project. They were recognized by Project staff as a more viable framework, leading to a qualitatively more effective educational strategy for developing greater leadership capabilities in education.

Competency-guided instruction for professional preparation, as presented in this program, represents a departure from some basic premises of competency-based and performance-based programs. The major features and philosophy of competency-guided instruction, as defined by the SEST project, include the following:

1. Competencies are a synthesis of many behaviors expressed as a unity and forming a performance pattern.
2. Competencies are complex, consistent patterns of performance expressed in a job context.
3. The number and character of anticipated performance patterns are stated publicly in advance of training and are specified as critical, major, and specific competencies.
4. Assessment of competence is at the three levels corresponding to the three levels of complexity of performance patterns.
5. Competency attainment is in relative terms, providing room for assessment of continual growth in competencies. Pass/fail levels are not set unless they can be supported in relation to minimum essential standards of practice.

6. The training period is pivotal for the attainment of professional status, but continual growth is the key to competency development.

7. Competency attainment varies according to individual entrance capabilities, growth rates, interests, and aspirations.

8. Training for competency development far beyond entry level in some areas is balanced against training to develop competence in deficient or weaker areas.

9. Time allotted for attaining given competencies varies, but time within the total program is relatively constant. However, continuing development of competencies is assumed in the post-preparation period.

10. A variety of training activities extending over hours, days, or months may be experienced concurrently. Activities are not necessarily presented in a certain order nor restricted to self-paced, self-instructional, or programmed activities.

11. Learning activities are selected so that each trainee is provided the opportunity to experience a wide variety of learning methods.

12. Learner participation is utilized in the decision-making process regarding the what, when, how, and why of instructional activities.

Critical Competencies

The concept of a critical competency was developed by the SEST staff to deal with two problems of designing a competency-guided, individualized, instructional leadership preparation program. One problem had to do with keeping specific competencies and related training activities directed toward genuine, task-oriented, on-the-job performances. The other was concerned with significantly delimiting the enormous variety of professional leadership competencies that might be specified.

The critical competency of professional performance specifies a fairly complex array of on-the-job behaviors which, when capably conducted, produce a product or service of value to school officials under most educational conditions. Each critical competency, by its very nature, requires special training for most professional personnel.

In the SEST model, critical competencies are delimited by the Project's concept of instructional leadership and its assumptions regarding the essential character of instructional supervision in a school setting. These competencies were validated by a series of procedures: (1) two state-wide surveys, (2) two review conferences, and (3) a national survey. This means that all competencies are specifically concerned with practices relating to instruction, as well as involving a demonstration of leadership capacity. They are focused on influencing the teaching/learning process and not upon its implementation or maintenance. They are change-oriented in the sense that they are specified as performances to improve the character of the existing instructional program rather than to sustain it.

Competency Specifications

Seven job-task areas were defined as those within which professional supervisory personnel were presumed to perform if they function as change agents. These task areas are not unlike the "ten tasks of supervision" previously identified by Harris (1963). Furthermore, they have been verified by literature searches (Martinez & Harris, 1975) and field surveys (Gruber, 1974).

Critical competency statements were written within each job-task area, with 27 of these complex performance patterns specified originally. They were later revised and reduced to 24. Rather than include all conceivable

performances in this array, the Project selected those that seemed most important in the sense of being almost universally desired from supervisors who expected changes toward the improvement of instruction. Only directly and instructionally relevant competencies were included.

Major competency statements, written as a subset of each critical competency, were specified as rather complex performances but somewhat more limited in scope. Of the 81 major competencies selected, three or four were associated with each of the critical competencies. These, too, were selected from a broader array. The seven job-task areas, and the number of competencies in each, are shown in Table 1.

Table 1

Job-Task Areas for Supervisory Personnel

Job Task Areas	Number of Competencies Critical	Major
1. Developing Curriculum	3	12
2. Developing Learning Resources	3	9
3. Staffing for Instruction	3	9
4. Organizing for Instruction	3	9
5. Utilizing Supporting Services	4	13
6. Providing In-Service Education	5	20
7. Relating to Public	3	9
Total	24	81

A full explanation of competencies, their selection, validation, and use, is given in Chapter III.

The Field as a Learning Context

Field-centered learning is emphasized in the competency-guided model. While there are other methods appropriate to higher education, the tradition of combining academic with field learning seems well founded. (SEST Project, 1975; Weber, 1973; Kaufman, 1972; Gold, 1951; Kessel, 1953; Lynd, 1945; Sikkema, 1966.) Considered of particular value is exposure to the reality of ongoing events that are typical of what the student will face as a professional (Weber, 1973). Program planners consider field experiences essential to professional training because they perceive the field as an ideal place to:

- test students for fitness to the profession, helping them determine if they are able to handle the work and are really interested in it
- assess competence in performing tasks typical of the professional role
- gain and synthesize the necessary knowledge, values, attitudes, and skills

To determine what should be learned in the field, there must be some rationale for setting priorities and selecting assignments. In addition, there should be a fairly consistent philosophy of instruction for all learning in the program. In the SEST Project an attempt was made to use the competency-guided approach in all phases of the program, whether learning activities occur in class, in the field, or in the lab. Thus, it is considered necessary to structure field learning in conjunction with competency-guided tenets.

PROGRAM GUIDELINES

The individualized program for Special Education supervisors is guided by the program model, presented in Chapter IV. Briefly, selected competency cells of the competency matrix form the common core of the program. Indi-

vidualized program plans are developed for each trainee on the basis of diagnosed competency-development needs. A limited array of uniform experiences is built into the program to promote affective outcomes not specified or to complement other competency-oriented experiences. The use of existing and readily available preparatory resources (courses, workshops, personnel), rather than the development of a completely new program, is a unique feature of the program.

The program includes eight types of experiences:

1. Assessment
2. Independent study
3. Group interaction
4. Laboratory simulation (including CIA)
5. Formal courses
6. Micro-courses
7. Field/practicum experiences
8. Special on- and off-campus events (conferences, workshops, visiting lecturers, field trips, etc.)

These experiences are provided on an individually-based program plan for each traineee, determined in large measure by his competency profile. Trainees are actively involved in self-assessment and in identifying training experience needs as well as in actual study. A survey of existing courses and personnel both on the campus and in the field can provide information in regard to available means of meeting these needs.

The program is on the graduate level and takes approximately one year to complete; the projected time is 200 to 220 days, or approximately 2,000 hours. A master's degree and state supervisor certification are incorporated into the plan as far as possible. Table 2 presents a time line and projected sequence of studies for the program.

Competencies

The program rationale is linked to the instructional leadership competencies developed prior to designing the model. These include basic competencies, which are the human, conceptual, and technical ways of functioning that constitute leadership capability in a broad array of situations; and programmatic competencies, which are developed specifically for promoting change in specific task-relevant situations. Programmatic competencies are defined by the character of the performances required to apply specific processes to instruction-related tasks.

Table 2

Program Time Line and Study Sequence

TIME SCHEDULE	ACTIVITIES	EXPERIENCE TYPE
Feb. - July	Recruitment, Screening, Selection, Admission	1. Assessment
Sept.	Competency Assessment of Trainees	1. Assessment
Fall	Initial Training Cycle	
	--Use of modules in Learning Lab	2. Independent Study
	--Exploratory Field Experiences	7. Field Experience
	--Common Seminar	3. Group Interaction
	--Periodic Workshops	4. Lab/simulation courses
		3. Group Interaction
	--Elected Courses	5. Formal
	--Visits to schools, conferences, professional association meetings	8. Special Off-Campus
Spring	Internship Cycle	
	--National or State Professional Association Meetings	8. Special Off-Campus
	--Common Seminar	3. Group Interaction
	--Internship in Field	7. Field Experience
	--Elected Courses	5. Formal Courses
		6. Micro-Courses
	--Job Selection	2. Independent Study
		8. Special Off-Campus
	--Competency Guided Study in Learning Lab using modules	2. Independent Study
Summer	Terminal Cycle	
	--Preparation of new Independent Study modules	2. Independent Study
	--Debriefing and Assessment Workshop	3. Group Interaction
		1. Assessment
	--Elected Courses	5. Formal

Training Activities

Activities are guided by specified, measurable competencies which emphasize individually prescribed field experiences as well as those provided on campus. To facilitate this, cooperative agreements are negotiated with school districts and other educational agencies selected on the basis of personnel and program characteristics. For the prototype training program, for example, agencies that provided field activities included the Austin Independent School District, Region XIII Education Service Center, schools in Williamson and Comal counties, and the Texas Department of Mental Health and Mental Retardation.

Trainees

Trainees are selected on the basis of their potential as special education supervisors, as determined by educational consultants as well as project staff. For the model, 15 experienced teacher prospects as supervisors were selected with the assistance of Texas Education Agency consultants, Education Service Center Staff members, and cooperating school district personnel.

Facilities

Research and demonstration facilities are essential to a field-oriented program. In developing the model, the University of Texas at Austin, which is surrounded by a vast complex of service facilities, offered an unparalleled opportunity for observation, research, and study. The depth of internship facilities made Austin an exemplary laboratory for a project in special education.

In addition to community facilities, there are a number of divisions within the University's College of Education that proved of value to the

program. These include:

The University of Texas at Austin Data Processing Center
Computer Assisted Instruction Laboratory
Laboratory Schools Bureau
Learning Disabilities Center
Media Center
Office of School Surveys and Studies
Reading Center
Research and Development Center in Teacher Education
Special Education Area Learning Resources Center
Experimental Early Childhood Education Pre-School

Personnel and facilities of the Texas Education Agency were available on a continuing basis. Other resources included local education agencies, regional educational service centers, and the Regional Educational Development Laboratory.

II

PROGRAM GOALS, ASSUMPTIONS, AND SPECIFICATIONS

The major goal of the competency-guided program is to provide a training model for instructional leadership, incorporating formal instruction and practical experience in high quality graduate level preparation. The focus is field practice, with the program characterized by training experiences and projected outcomes that are professionally-based and field-oriented. Although the program is designed particularly for special education supervisors, it is applicable to leadership positions in all areas of education and possibly in the social sciences.

The program is designed to develop the methods, understanding, and styles for school personnel to serve as change agents. Because the program is individualized, it provides for differences in entry-level capabilities, learning modes, and aspirations. Thus, it offers a diverse array of experiences that furnish simulated and real role-assumption opportunities.

A principal assumption of the model is that there are basic competencies that pervade qualified leadership behavior. When made explicit, these competencies can serve as guidelines for developing and implementing training programs. A second assumption is that professional leadership development is a continuous process, with formal training structured within specified time units. The long range process is enhanced and matured by intensive, individualized preparatory experiences which encourage continual personal and professional growth. A third assumption is that the trainee can and should take the major responsibility for self-analysis, which serves as the basis for diagnostic and prescriptive decisions which lead in turn to individualized training experiences. This contrasts with assumptions that lead to

controlled, prescriptive programming and neglect to consider the trainees' individual interests and needs. A fourth assumption is that competencies specified for training purposes are most useful when they clearly relate performances to job tasks.

It should be noted that general assumptions commonly found in training programs are not ignored in the model. Professional experience, intelligence, academic aptitude, and personal-social maturity all are prerequisites to program entry.

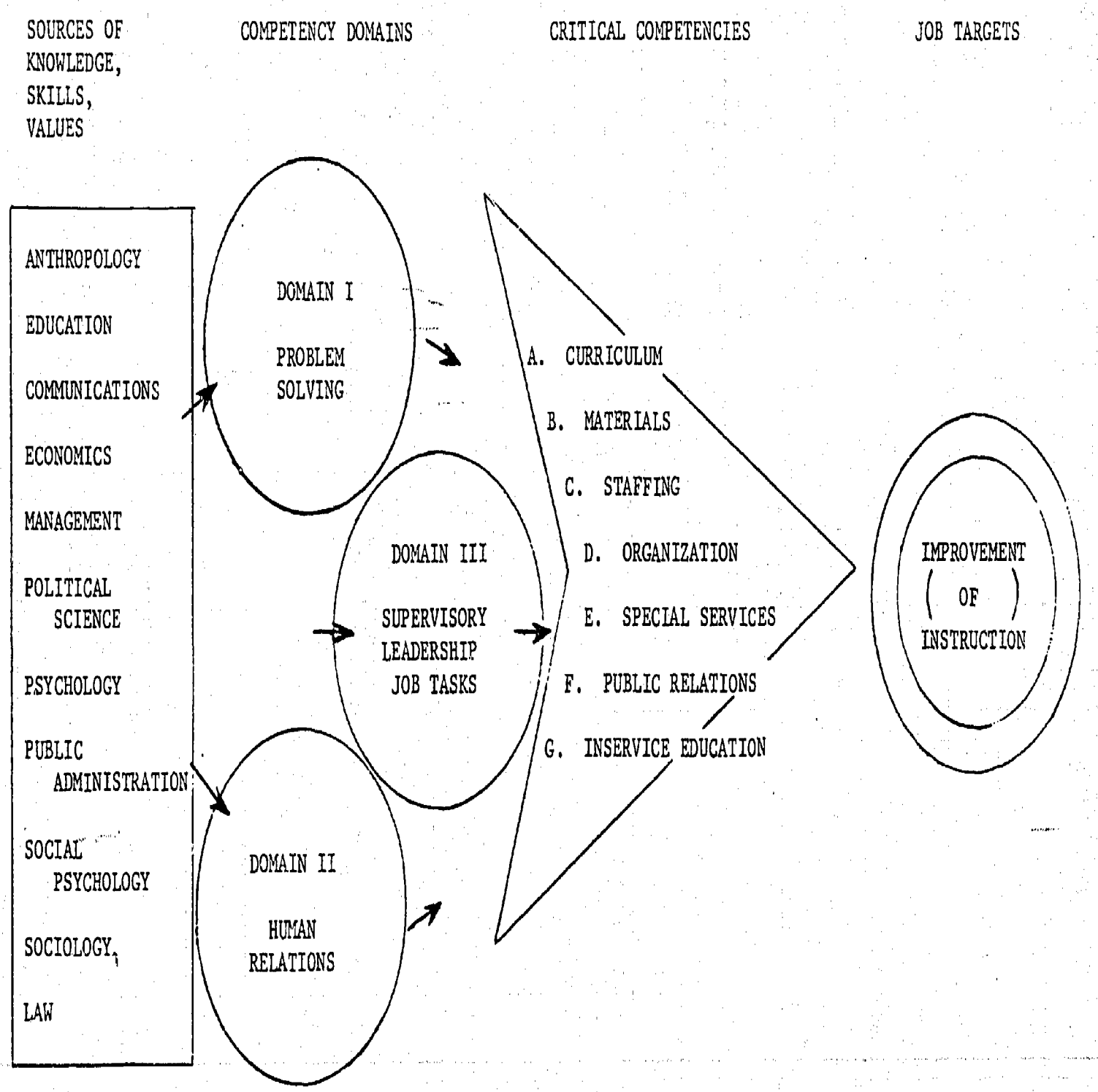
THE GENERIC MODEL

The SEST Project staff conducted an extensive search in the literature of numerous disciplines to determine the kinds of behavior engaged in by professionals in all areas. From that survey it was determined that competencies in two domains--problem solving and human relations--could be identified readily as generic behaviors necessary to successful performance in all leadership positions. A third domain--job tasks--was identified as the interchangeable portion of the model that determines the specific character of the educational leader training program. In this model Domain III contains the numerous competencies expected of the instructional supervisor. The competencies in all three domains are specific at different levels of complexity and are viewed as a pool from which any selected array of competencies can be drawn. Figure 1 shows the relationship between the behavior sources, competency domains, and critical competencies in the program model.

As various behaviors from the three domains are combined in unique ways, they form the more complex behaviors which are known as critical competencies. They are defined in terms of the specific job tasks expected of a given role. The fact that an endless number of critical competencies could be generated by the model is seen as one of its greatest attributes. This feature, together with the "replaceable" feature of the job task domain, provides considerable

Figure 1

Competency-Guided Training Model



flexibility in using the model. After an array of critical competencies is generated, some empirical procedure is utilized to delimit the number of critical competencies used to guide any one training program. Then, as shown in Figure 1, the demonstration of the behaviors in the specified competencies in an actual job situation is assumed to promote instructional improvement.

Another important step, illustrated in Figure 2, is the specification of major competencies as subsets of critical competencies (see Appendix A for SEST major competencies). Critical competencies are statements of behavior patterns to be demonstrated in actual work situations. The more complex behaviors in a critical competency can be broken down into logical and carefully specified components or subdivisions. These components, which serve as indicators of the critical competency, are known as major competencies. Drawn from the three pools of competencies described as the competency domains, major competencies constitute numerous behaviors which are observable in a classroom, in simulations, or in a controlled field experience. Many of these behaviors are keyed to specific instructional material or experiences which will assist students in attaining the described major competencies. It is assumed that a student who attains all major competencies under a given critical competency will be able to perform the critical competency as well.

Each of the major competencies is further subdivided into specific competencies. Again, the assumption is made that the behaviors identified as specific competencies will serve as indicators of the major competency from which they are derived. This level of competency specifies behaviors which could be demonstrated with paper and pencil tests, written reports, or performance tests at the knowledge, skills, or comprehension levels.

Essentially, there are two hierarchies: competency domains and critical competencies. In the first hierarchy, each domain has various subject

Figure 2

A Critical Competency and Its Subsets
(An Example)

CRITICAL COMPETENCY

F-1 Supervising with the Clinical Model

Given a teacher experiencing difficulties within a classroom, the supervisor can lead the teacher through a clinical cycle using classroom observation data, non-directive feedback techniques, and various inservice and planning experiences in appropriate sequence to produce significantly improved teacher behavior.

MAJOR COMPETENCY

F-1a Using Observation Systems

Can use more than one observation system to record objective interaction data during live or taped sessions with high inter-observer reliability.

SPECIFIC COMPETENCY

F-1a(1) Using FIAS

Can use the Flander's Interaction Analysis System to record five uninterrupted minutes of video-recorded classroom interaction with an inter-observer reliability of .75.

SPECIFIC COMPETENCY

F-1a(2) Using OScAR V

Can use the OScAR V or later edition by Medley to record a ten-minute tape-recorded lesson in a classroom with inter-observer reliability of .75 or better.

SPECIFIC COMPETENCY

F-1a(3) Using Pupil Response Inventory

Can use the Harris-McIntyre Pupil Response Inventory in a live classroom situation during a 20-minute discussion or recitation with 20 or more students to produce frequency tallies by categories with a coefficient of .75 or better when compared with a skilled observer.

MAJOR COMPETENCY

F-1b Providing Feedback

F-1b(1) Can use a high percentage of nondirective interaction to provide feedback to a teacher.

headings. For example, in Domain I, Problem Solving, there are competencies in assessing, planning, implementing, and evaluating. The competencies that describe the behaviors expected in each of the categories are called basic competencies. In the second hierarchy, the subdivisions of the critical competencies are called major competencies, which are further divided into specific competencies. Major competencies are delineated by determining which of the basic competencies constitute logical and essential components and are therefore primary indicators of a critical competency. Although all major competencies are drawn from the basic competency pool, not all basic competencies are selected as major competencies. Project materials do not reflect the specific competencies. These are illustrated in Figure 2, but in operation trainees, instructors, field supervisors are expected to make explicit the specific competencies in focus.

INDIVIDUALIZING THE PROGRAMS

Individualization is provided in a variety of ways. Competency assessment is individual, largely self-directed. Competency needs provide individualized lists of priorities by critical and major competencies. Learning laboratory modules are provided for independent study in each competency area. Field experiences are planned with individual competency needs clearly in focus.

A more complete explanation of individualizing programs is given in Chapter IV.

FIELD EXPERIENCES

Internships, field trips, field laboratories, student teaching, and on-the-job training are all terms that have been used to describe programs or program elements for leadership training. The widespread inclusion of

these terms in certification standards and college course descriptions in professional schools suggests that the concept of field experience in connection with professional education, and particularly with leadership training, is of great importance. On the other hand, it is difficult to find descriptions of how the field is used for educational training beyond that of long-existing vocational training programs. Even more rare is a conceptual or descriptive analysis of field experiences in the teaching-learning process.

The training model is based on the assumption that field experiences are essential for developing competence in education supervisors, but that they must be combined with other elements of training to be efficient and effective in more than superficial ways.

The Field Experience Concept

Field experience is distinguished by the fact that it pertains to the naturalistic phenomenon of an on-going program or situation rather than with a contrived, prestructured set of events. A second distinction is that it involves experiencing events that are real, normal, and often spontaneous rather than carefully preselected. They are, however, cooperatively planned in the field, with competency assessment data in hand, by field personnel, trainee and college instructors. This assures that reality serves learning needs and the trainee does not become a puppet on the strings of operating demand.

Various levels of involvement can be provided in a field situation. At one extreme is a remote on-looker, with a limited, uninvolved, unsystematic way of relating to the real situation. At the other extreme is a highly involved participant whose interactions might produce substantial

changes in the field setting. Between these extremes are several benchmarks of involvement: viewing on-going events, which calls for some intellectual interaction; systematic observing, which includes recording, analyzing, and interpreting events; normal participation, in which the observer role is minimized and the participant role expanded to make the trainee relatively indistinguishable from other participants; and influencing participation, in which the trainee assumes some kind of special role and is involved in influencing the normal stream of events.

Field Experience in Professional Leadership Training

The commitment of field experience as an important component of the formal training of instructional and other leaders has been firm within the Department of Educational Administration at The University of Texas at Austin for at least 15 years. Certain assumptions underlie this commitment.

Field experiences, regardless of the title or the specific character of the field assignment, assume at least three kinds of relationships between experience and leadership competency development: (1) systematic observation and analysis of reality, (2) modeling and practicing of observable performance, and (3) first-hand participation involving assumption of real resonsibilities and facing consequences. Briefly stated, these assumptions might sound something like this:

1. When a trainee systematically observes selected real events and undertakes analytical procedures selected to relate real events to theoretical constructs, the observer-analyst gains new understanding about relationships among observed events, theoretical constructs, and patterns of real events that enable him or her to better predict probable consequences.

2. When a person or persons function in a real school setting in ways that are different from performances that would be readily duplicated by the trainee, the trainee, by observing and attempting with some guidance and direction to mimic, reproduce, or approximate similar behaviors, learns to do so.

3. When a trainee is confronted with reality and is expected to become involved and perform according to concepts held and/or in terms of situational demands, trial and practice results in the development of new or modified skills.

This concept is shown graphically in Table 3.

Effectiveness of Field Experiences

Most professional preparation programs require some experience in the professional world--the medical profession in a hospital or clinic, engineering in field projects of various kinds, the legal profession in law offices and courts. Professional preparation of classroom teachers relies on student teaching in schools and, in recent years, more extended internships. These practices attest to the belief that field experience is of value in professional preparation. What is lacking is an adequate rationale for determining the kind and amount of field experiences to use and in what sequence and under what conditions to use them. Too often programs simply assume that field experiences are good and are needed. A more sophisticated rationale that specifies the utility of these kinds of experiences is needed.

The SEST Project does not assume an essentially vocational trade training viewpoint in which guided practice and on-the-job experience predominate the entire program, with other learning experiences incidental. Such programs emphasize skill development and focus on the expectations of a clearly de-

fined job or trade, an approach not suitable for instructional leadership development. Nor does the Project assume that "experience is the best teacher." On the contrary, a rationale can be developed to support the contention that experience is best only under a special set of conditions and with reference only to certain learning tasks.

Rather, the Project assumes that four kinds of learning potentially can be obtained from field experiences:

1. Simple information. It might be assumed that certain kinds of information are not readily available from sources other than the field, or that field personnel and field observations can best provide this kind of information.

2. Skill development. Field experiences could be considered essential for providing the trainee opportunity to develop skills, practice them in a variety of situational contexts, and test levels of proficiency.

3. Complex understanding, especially in regard to transferring concepts from one situation to another. Isolated bits of information that might be related to a real situation could be identified and interrelationships more clearly understood on the basis of field observation.

4. Attitudes and values. Field experiences can motivate persons to become involved and can stimulate a sense of pride, satisfaction, and enthusiasm for learning.

Table 3

RELATIONSHIP BETWEEN INVOLVEMENT AND EFFECTIVENESS

IN FIELD TRAINING

Involvement Level	Learning Process	Type of Learning Outcome	Estimate of Effectiveness*
Remote Onlooker	**(1) Observation	(1) Information	1
Purposeful Observer	(2) Observation	(2) Information	1
Systematic Observer	(2) Observation	(2) Information	1
Participant Observer	(2) Modeling	(2) Skill	2
Normal Participant	(3) Modeling	(3) Skill	3
Influencing Participant	(4) Modeling	(4) Skill	4
Influencer/Controller	(4) Practice	(4) Skill/Understanding	4

*Effectiveness ranked on scale from 1 (low) to 4 (high)

**Parenthetical number indicates degree of process and outcome, ranged on scale from 1 (low) to 4 (high)

Efficiency and Field Experience

To say that one or more field experiences can effectively provide information, understanding, and skill learning covers only one aspect of this approach. In a short-term training program with a minimum number of hours and an almost limitless array of competencies to be developed, the question of efficiency is important. Training costs also are associated with the question of efficiency; when costs become high, the efficiency question becomes crucial.

Field experiences, therefore, must be assessed from an efficiency point of view. In terms of simple information, studies indicate that field experience should be a secondary rather than a primary source. A variety of methods--reading, mass media, group discussions, lectures, simulation, role playing--seem at least as effective for obtaining most kinds of information and at a much lower cost. Control over the sequencing of information is more effective in non-field learning; opportunities for independent study are better obtained elsewhere except when such information is well provided in a unique way. Most of the media suggested, with the possible exception of certain kinds of simulations, are substantially less expensive than field experience. It would appear that informational components are not more effectively, and are less efficiently, handled through field experiences than through alternatives.

In a skill development field experience shows great promise. It can provide a model, a close directed practice situation, and a setting for putting together a complex array of cognitive and psychomotor skills into larger patterns of performance. A practitioner who constantly uses professional skills is likely to provide a good model, to be a competent diagnostician, and to provide immediate feedback and suggestions for improvement to the trainee. However, films and video tapes, demonstrations, and role playing

might be more economical methods of providing models for skill building. Computer simulations and complex games might be more efficient for developing complex skills which require long-term experience, except for the highest levels of skill development.

Control and predictability also must be considered. While the trainee in the field ideally would have frequent opportunities to see model behavior, it is in fact difficult to predict and control the kinds of models available and to sequence exposure to models with the guided practice in the real situations, since the opportunities offered have to be taken as they occur. The difficulties of control, prediction, and sequencing argue more for testing skills against a variety of situational and program contexts and less for skill building in the field, especially where sequencing may be crucial.

Risk is another factor to consider. Whenever development, practice, or testing of skills involves risk to the stability of the organization or to the well-being of either the trainee or his clients, then one must be more cautious in using field experience. The more advanced and sophisticated aspects of skill development may involve little risk, but when risk is high, cost/benefit ratios of field versus other training must be assessed carefully. Field experience seems to have an important place in skill development, providing its greatest value for advanced levels of practice and refinement in skill rather than in initial skill development.

Complex Understandings and Field Experience

The development of complex understandings of the kinds that are unique to professional preparation programs seems dependent on field experiences. It may be that one of the unique characteristics of a professional, as contrasted with a tradesman or technician, is the capacity to understand the phenomenon with which he works in theoretical terms, leading to the capacity

to develop unique ways of applying professional knowledge and skill to complex problems. This is difficult to attain and may require complex kinds of field experiences. As a person gets deeply involved in field experiences and sees a broad array of events and the consequences of his own acts in relation to those events, perhaps only then can he truly comprehend the people, problems, and situational relationships with which he is dealing. It is in that field context, too, that the trainee is likely to have opportunities to test hypotheses regarding the consequences of alternative patterns of his own behavior.

It may be that this is one kind of learning for which the effectiveness criteria are so important that they override the efficiency questions. Without in-depth field involvement, it may well be that a sufficient array of related events, with all of the diverse situational and human elements, would never come together to stimulate the more complex kinds of understanding.

The real field experience offers the highest level of involvement and responsibility for the trainee, it also creates an urgency for response, action, and results that countermands the potential for hypothesis formulating, testing, and high level conceptualizing. Therefore, for the field experience to serve this latter purpose it may need to be associated with other elements not generally found in the field situation. Insulation from the pressure for action by periodic removal from these pressures may be essential. Removal could provide time and energy for contemplation, analysis, and verbalizing about the event experienced in the field. As involvement in field experiences reaches a peak and the urgencies of the field command all energy and attention of the trainee and other field

personnel, the greatest promise for learning may be lost if mitigating measures are not taken.

INDEPENDENT STUDY ACTIVITIES

One assumption regarding the character of the competency-guided leadership training program concerns the ability of selected graduate students to pursue a substantial amount of their learning through independent study activities. In a sense, of course, independent study is found in all aspects of graduate education. Here, however, the term is used in more limited context, referring only to those specific diagnosed learning needs which are pursued by the trainee on an individual basis according to the trainee's own time table and with a minimum of guidance or direction from staff members. Independent study traditionally has taken the form of library research, although it has rarely been guided by a diagnosis or specification of learning needs. The SEST Project has attempted to identify learning packets and sets of training materials which, with minor modification, permit self-instructional use. For particular learning needs associated with a competency, efforts have been made to develop materials when none are available.

Independent study activities that extend beyond library research or special projects and conform more fully to the definition cited include: (1) reading assignments that are highly specified, (2) computer-assisted instruction experiences designed for explicit kinds of learning outcomes, (3) programmed text materials, and (4) independent projects designed for a specific competency. One approach to independent study that is growing in popularity and practice is the Learning Activity Packet, sometimes referred to as Independent Study Kits or simply Training Modules. These packets are instructional in that they are self-contained vehicles for independent study and learning. They specify objectives, offer guidance with almost no instructor involvement,

and provide self-scoring devices for learning assessment. The high level of self-directiveness made possible by the best designed learning activity packets is one of the strengths of independent study activities. They individualize learning according to competency needs, and they permit economical, flexible use of the trainee's time, allowing for a great deal of self-direction and self-pacing in the trainee's activities.

Self-directiveness, however, also is the source of some problems with the learning activity packet. To make them both self-contained and comprehensible, there is a tendency to:

- specify objectives in simple, sometimes fragmented, formats to facilitate the trainee's understanding and degree of attainment.
- select activities based on reading and written work, rather than more effective activities in the field that are also more difficult to assess.
- express the criteria of success in terms of the specific packet objectives, not in terms of larger clusters of objectives that might form competencies.
- produce expensive and time-consuming packets, largely because of the fragmented nature of the objectives in the packet.
- select objectives on the ease with which they can be packaged, rather than on their basic worth.

These problems are not presented as criticism of the learning-packet technology, but are suggested in a cautionary way. They suggest the need for careful and rigorous evaluation of learning packets in terms not only of their efficiency in accomplishing specified objectives but also in terms of their relevance to a larger body of competencies.

CONTINUOUS TRAINING

The concept of continuous growth and development as an essential assumption of any professional preparation program is reflected in various ways by the SEST Project materials and program structures. Competency assessment is open-ended with no pre-determined success levels. Competencies are specified as selected major and critical performances with no pretense at comprehensiveness. In both of these instances, continuous training assumptions are made operational.

Competency pre-assessment provides trainees, whether inservice personnel or graduate students in a pre-service program, with opportunities to freely express their estimates of competence. However, in-progress competency assessment demands that relative strengths and limitations be identified. This provides assurances that even the most fully competent trainee will give attention to further development of his or her competencies that are least highly developed even though they may not represent weaknesses.

Consistent with the assumption of continuous training, the post-assessment process still calls for the identification of "competency needs" and engages the trainee in diagnostic analysis and growth planning activities. The end of a training program is not treated as a point in time to demonstrate competence, but rather as a time to take a forward look at the need for continued professional growth.

The twenty-four critical competencies and the 81 major competencies associated with them constitute a rather extensive array of competence. Even so, they are selected from a much broader array that might easily

be included in a training program. Similarly, many non-instructional leadership competencies are easily specified within each of the seven task areas. Hence, by implication, the assumptions of continuous growth are clearly reflected. Operationally, no minimum nor maximum time limits are imposed on the trainee. Each assessment leads to plans for further learning activities. A full training sequence is assumed to be minimal and not desirably shortened for any but emergency reasons.

III

COMPETENCIES

Various types of competencies are defined in this document. The basic term refers to the long-range demonstration of an ability to perform a specified behavior or series of behaviors at some level of proficiency. Kelley and Teagarden (1974), in their work on competencies for the National Institute for Secondary School Administrators, asserted that:

> We can measure competence only through an accumulation of evidence, over time, that an individual is able to perform certain functions or skills in ways which are, more often than not, considered positive by both the individual and his audience. A person is not competent when what he knows, does or feels is evaluated as being positive in its results and is a part of his consistent behavior as a human being.

Bishop (1970) attempted to define supervisory competencies in terms of selected combinations of tasks, functions, and processes applied to educational change. Like most models of change-oriented process, however, the elements of behavior are characterized in general terms and offer only limited direction to supervisor practice.

Staffs at various institutions have struggled with the difficult problem of defining competencies for teachers, administrators, and supervisors (Bishop, 1970; Burke, 1972; Dallas Independent School District, 1971; and others). Whether the concern is for planning, for training programs, or for evaluating inservice performance, the problem is always one of how to move from general classes of learning toward a designation of the character of the competencies in performance terms.

A useful distinction can be made by characterizing a competency statement as a description of a task relevant action and defining a supervisory

activity as any distinctive performance directed toward task implementation. In the first instance, there is a concern for defining specified behaviors in certain task-relevant ways; in the second, an activity defines more than an individual's behavior and includes relations between people, problems, and situations as they actually are faced in school settings. Competencies for supervisory personnel might best be defined, then, as statements describing the demonstration of skills and knowledges for specified outcomes related to task implementation. Such statements may be written to define competencies for the completion of an entire task or any segment thereof.

The complexity and variety of knowledge and skills included in various competencies will vary, depending on the task involved. Since different configurations of similar knowledge and skill will form competencies that are relevant to the accomplishment of different tasks, it seems economical to consider and train for supervisory competencies that are as simple as possible while being genuinely functional in task accomplishment (Harris, 1975).

DEFINING COMPETENCIES

In developing the training model, Project staff made an initial assumption that professional preparation programs should be guided by a set of specific professional competencies to the extent that they could be clearly distinguished and justified. While the Project accepted the premise that a professional competency is a kind of performance or a capability to perform in some specified way, the assumption was made that competencies, to be useful, could not be synonymous with instructional objectives as usually defined (Mager, 1972; Roueche and Herrscher, 1973). A distinctive definition evolved:

> A professional competency is a statement of human capability to perform in certain complex problem situations, employing both

> knowledge and skills in such ways as to accomplish a worthwhile outcome as judged by criteria acceptable to professional groups and supporting institutions.

By this definition a competency is a performance, but of a special kind. It is neither an instructional objective nor an operational objective. The complex character of the performance is characterized as

> Knowledge and skill—combined to produce a pattern of performance--likely to result in worthwhile outcomes that meet certain professional and societal standards of quality, efficiency, and effectiveness.

This definition seems helpful as a basis for specifying instructional leadership competencies for guiding a graduate-level training program. Several problems persist, however, within such a definition: deciding how complex the cluster of knowledges and skills should be, determining the performance patterns for displaying the relevant knowledges and skills, selecting competencies from among the vast number that might be worthwhile, and measuring minimum levels of quality, efficiency, and effectiveness.

In surveying the competencies generated by various training programs, Project staff concluded that they could be grouped into four major types: behavioral, global, process, and critical.

Behavioral competencies are characterized by reduction of performance to specific, isolated knowledge or skills. One suspects that, at times, the traditional content of education courses has simply been converted to behavioral terms to comply with emerging state guidelines. As Maxwell (1974) stated, "The professor can carve his course into 'modules,' rephrase the chapter-end questions in the textbook and move them to the front of each module, and then state the 'performance level' required" (p. 310).

Behavioral competencies are typified by the following statements:

> Describe four examples of informal communication processes.
> Define auditory development and auditory discrimination.
> Be able to construct and utilize behavioral objectives.

These specific performances have the advantage of being fairly easy to teach and evaluate, but they suffer from a lack of cohesion. As Broudy (1972) asks,-"are competencies mechanically additive?" Do behavioral competencies, taken in sum, add up to the skills that a professional supervisor needs?

Global competencies are difficult to distinguish from platitudes and can be recognized by statements such as:

Recognize and cultivate the abilities of others.
Listen with a genuinely open mind.
Demonstrates sensitivity to role identifications of co-workers.
Sets a professional example.

While these have the advantage of universal appeal, they are too open ended to be useful.

Process competencies, advocated by Tyler (1974), define how a person proceeds in a problem-solving task. The general objectives of this approach include:

How to attack problems.
Finding out where difficulties are.
Getting information.
Analyzing data and drawing inferences.

In the problem-solving area, students are evaluated on procedures learned, factors considered, resources surveyed, and feasible answers produced. Tyler stressed that the production of single correct answers was not the goal of such a program. Rather, students should be taught to become inquirers, to approach tasks with initiative and creativity, and to apply principles and skills learned to new situations.

Tyler's process approach seems most promising as a new step in the evolution of competency statements. However, it suffers currently from lack of detailed explanations and examples of competency statements in these processes. It ignores the fact that the role of the teacher or supervisor involves more that just solving problems, although this area is probably one of the most crucial.

Critical Competencies describe a complex of on-the-job behaviors that produce, when manifested at a reasonably high quality level, a product or service which would be highly valued by school officials under most educational conditions. Furthermore, each critical competency is of such a nature that most professional personnel could not demonstrate it without special training. An example, developed for the SEST Project in the area of instructional staffing, specifies the following:

> 9B - Interviewing for Selection. Given a specific position to be filled, the supervisor can develop a series of relevant interview questions, can utilize them with an array of applicants to elicit similar information from each, and can prepare a useful summary report which can be used with other data in the final selection decision.

The concept of a critical competency was developed to deal with two problems of designing a competency-guided, individualized, instructional leadership preparation program. One problem had to do with keeping specific competencies and related training activities directed toward genuine, task-oriented, on-the-job performances. The second was concerned with significantly delimiting the enormous variety of professional leadership competencies that might be specified.

EVALUATING CRITICAL COMPETENCY STATEMENTS

The number of critical competencies is delineated by the Project's concept of instructional leadership and the assumptions regarding the essential character of instructional supervision in a school setting. This means that each of the competencies is specifically concerned with practices relating to instruction. Critical competencies are also change-oriented in that they are specified as performances calculated to improve the character of the existing instructional program rather than to maintain it.

Critical competencies can be distinguished from other competencies by the way in which they are written. Hence, critical competencies for administrators or teachers might have the same general characteristics while specifying different behaviors. Following are five criteria that can be used to identify critical competencies.

1. Complexity - The performance specified must be relatively complex, embracing in a significant way at least two job task areas and being demonstrated over a relatively long time frame, that is, days, weeks or months as distinguished from minutes or hours.

2. Utility - The performance must be described in terms of a service or a product which is directly usable for improving instruction in a great variety of educational settings.

3. Reality - The performance must be described in a way that indicates the realistic conditions under which the service or product is likely to be delivered, without restricting the performance to a highly specialized class of conditions.

4. Predictability - The performances must be of a high level of probability, with potential for being called for in almost any educational setting in which large scale instructional changes are being sought.

5. Priority - The performances should be of high priority in a change-oriented educational situation, rather than relatively unimportant or less than urgent.

The preliminary critical competency statements developed to guide instruction in the SEST Project were evaluated by three to five expert judges, external to the project, utilizing the Critical Assessment Scale for Competency Statement Evaluation (CASCO), a rating instrument for assessing competency statements

according to the critical competency criteria cited (see Figure 3). The CASCO instrument requires a judge to make 13 ratings about a given competency statement. Four of the ratings concern the prerequisite characteristics, requiring judgements of the degree to which the statement is instructionally relevant and change oriented. Eight relate to the unique characteristics: the complexity, utility, reality, predictability, and priority of the statement. The final rating is of the global characteristics, assessing the degree to which the competency statement specifies a global synthesized pattern of performance.

After making the required ratings, each judge was also asked to make comment on the statement and to suggest rewording, revision, or deletion he or she considered warranted for any statement. The CASCO assessment scale results were graphed so that each competency statement could be analyzed for deficiencies in any of the prerequisite, unique, or global characteristics. On the basis of these rating and suggestions, the early draft versions of the critical competencies were revised. The result was the following list of critical competency statements, which have met the specifications for a critical competency as established by the Project staff. The rationale for these competencies and a performance example for each are given in Appendix A.

THE CRITICAL COMPETENCY STATEMENTS

A. DEVELOPING CURRICULUM: The Process of Improving the Guidelines for Instruction

A-1 Setting Instructional Goals

Given a mandate to clarify major goals of instruction, the supervisor can lead groups of parents, citizens, specialized personnel, teachers, and pupils through a series of discussions, presentations, training sessions, and other experiences to produce a report showing some of the most important instructional goals on which there is agreement.

A-2 Utilizing Specialized Personnel

Given a need for the production or adaptation of curricula, the supervisor can prepare a proposal to utilize the expertise of a variety of specialized and professional personnel to develop, review, and/or critique the relevance and applicability of curriculum guidelines or content for pupils with specific needs.

A-3 Adapting Curricula

Having secured innovative curricula developed outside the school or district, the supervisor can adapt the curricula to meet the needs of a student or student group, and make them available to local personnel for use in guiding instructional planning.

A-4 Designing Instructional Units

The supervisor can design instructional units which specify performance objectives, instructional sequences, a variety of appropriate teaching/learning activities, materials, and evaluative procedures.

A-5 Wri g Educational Plans

Given pertinent diagnostic data on one or more pupils, the supervisor can prepare educational plans for these pupils which specify curricular content and level, appropriate activities and materials, alternative teaching strategies, long and short range learning outcomes, and procedures for evaluation.

B. DEVELOPING LEARNING RESOURCES: The Process of Improving the Availability of Resources for Learning in the School or Community

B-1 Producing Learning Materials

Given learning needs and a curricula design to meet those needs, the supervisor can arrange for the production of the necessary learning materials to complement, fulfill, and/or enhance the aims of the curriculum.

B-2 Securing Learning Resources (non-material)

Given learning needs and a curricular design to meet those needs, the supervisor can secure, acquire, or arrange for the utilization of the necessary human and/o. physical resources to complement, fulfill, and/or enhance the aims of a curriculum.

B-3 Evaluating the Utilization of Learning Resources

Given an array of learning resources currently available for use, the supervisor can design and conduct a study to determine the extent and appropriateness of their utilization, and based on the results of that study, can make recommendations for the improved utilization of specific learning resources in specific ways.

B-4 Evaluating and Selecting Learning Materials

Given expressed needs for learning materials, the supervisor can develop a set of evaluative criteria and procedures to determine the quality, utility, and availability of learning materials, and can organize and conduct review sessions where teachers and other personnel can apply the criteria to new materials and make recommendations for acquisitions in needed areas.

C. STAFFING FOR INSTRUCTION: The Process of Improving the Recruitment, Selection, and Assignment of Personnel for Instructional Improvement

C-1 Developing a Staffing Plan

Given a new project proposal which specifies budget, general objectives, and operational procedures, the supervisor can describe essential staff positions to be filled, develop job descriptions for each, and specify the competencies required of the individuals who will fill the positions.

C-2 Recruiting and Selecting Personnel

Given a description of several staff positions to be filled, the supervisor, by engaging in a variety of selective recruitment activities, can secure a list of several possible applicants from various sources, can systematically secure and validate relevant information on the applicants by conducting personal interviews, by checking with previous employers, and by using other selection procedures, and can prepare a set of recommendations for filling the vacancies with the applicants who will best fulfill job requirements.

C-3 Assigning Personnel

Given the task of assigning new personnel and reassigning currently employed personnel to achieve instructional improvements, the supervisor can analyze the needs, expectations, and composition of existing staff groups in various units, and, based on that analysis, can prepare and justify recommendations for assigning and reassigning staff members to positions for optimum educational opportunity.

C-4 Allocating Time to Function

Given various staff positions and personnel functioning in them, the supervisor can design and conduct a time utilization study, analyzing each position with respect to the amount of time spent in each role, and can propose modifications of time distribution among the functions of instruction, supervision, general administration, and special pupil services in order to improve instruction.

D. ORGANIZING FOR INSTRUCTION: The Process of Improving Organizational Structures to Facilitate Instruction

D-1 Monitoring New Arrangements

Given the task of implementing a new organizational arrangement, the supervisor can determine reporting procedures, compare actual operations with planned developments, and when necessary, make recommendations to modify operations to bring them into agreement with formulated plans.

D-2 Revising Existing Structures

Having determined the strengths and weaknesses of an existing organizational structure, the supervisor can propose carefully reasoned or research supported changes, which may include the alteration of assignments, of the use of staff time, of the required reporting patterns, or of the allocation of resources to improve efficiency, productivity. and morale, and, in so doing, improve the instructional process.

D-3 Scheduling Services

Given diagnoses of pupils' needs and regular instructional personnel, the supervisor can propose a set of schedules to distribute services appropriately, to balance the loads of the staff members who provide the services, and to provide that recipients of the services maintain maximum involvement in their school programs.

D-4 Assimilating Programs

Given a successful instructional program operating within a center, school, classroom, or other unit, the supervisor can design a plan for the smooth integration of the entire program or selected components thereof into a larger system, prepare a timetable and assignments for the transferring of responsibilities, and assure that the instructional improvement evidenced in the program is continued in the system to which it is transferred.

E. UTILIZING SUPPORTING SERVICES: The Process of Securing and Providing Supporting Services to Students, Parents, and Staff for Instructional Improvement

E-1 Analyzing and Securing Services

Given a need for a supporting service not currently being used by a district, or by neighboring institutions, agencies or other consumers of supporting services, the supervisor can develop a master list which specifies sources from which to secure various services and describes their availability, quality and cost, and, after considering available options, can secure the needed service from the most appropriate source.

E-2 Evaluation of the Utilization of Services

Given a plan for providing supporting services within a district, the supervisor can compare that plan with the current operation by utilizing objective data gathered in accordance with previously identified criteria, and, based on the evaluation, can propose recommendations that would increase the effectiveness and quality of the system.

F. PROVIDING INSERVICE EDUCATION: The Process of Improving the Quality of Instructional Practices Within the Staff by Providing Opportunities for Professional Growth

F-1 Supervising with the Clinical Model

Given a teacher experiencing difficulties within a classroom, the supervisor can lead the teacher through a clinical cycle using classroom observation data, non-directive feedback techniques, and various inservice and planning experiences in appropriate sequence to produce significantly improved teacher behavior.

F-2 Planning for Professional Growth

Given a group of instructional personnel and data concerning various facets of their on-the-job performance, the supervisor can assist them to establish individual professional growth plans which include objectives for change in classroom practices, a schedule of experiences sequenced for continuous stimulation and growth, criteria specified for terminal and intermediate evaluation, and a specified period for accomplishing the objectives.

F-3 Conducting Training Sessions

Given a description of a staff group, including specific descriptions of their needs for training, the supervisor can design or adapt and

conduct training sessions which employ specific objectives, carefully sequenced learning activities, appropriate resources and material, and which can be shown to improve the skills of the participants.

F-4 Utilizing Human Resources

In the process of implementing an inservice plan, the supervisor can secure the services of a variety of consultants and resource persons, either from within the school system or from outside, and make arrangements for these consultants to contribute their unique expertise to improve staff competence in specific areas.

F-5 Training Leaders

Given individuals who have demonstrated both a high level of competence in a specific area and emergent leadership capabilities, the supervisor can train these people to conduct previously planned inservice sessions and to provide follow-up activities and support for participants that result in the improvement of instructional skills.

G. RELATING TO PUBLIC: The Process of Improving the Quality of Working Relationships Between the School Staff and the Public to Promote Instructional Improvement

G-1 Informing the Public

The supervisor can establish, promote and maintain favorable impressions of special education programs among community members by disseminating special education information through the public media, by speaking to public and school groups, by conferring with parents and other interested individuals, and by meeting, as necessary, with community groups and leaders.

G-2 Involving the Public

The supervisor can plan ways in which parents and other interested individuals can become productively involved in and trained to assist at various levels of the special education program.

G-3 Utilizing Public Opinion

Given public opinion data regarding a special education matter, the supervisor can establish the urgency of the topic, determine the validity of the data, and, as appropriate, utilize the data in the decision-making process regarding initiation of new aspects, or the maintenance, revision, or discontinuation of current programs or practices.

DISTINGUISHING CHARACTERISTICS

Complexity of Behavior

A critical competency by definition includes several important competencies linked together into what might be called a pattern of behavior. In many instances the individual competencies would not in themselves be of value in an on-the-job context, but when linked together they can provide for the delivery of a worthwhile service or product. For example, consider the following competency statement:

> Uses Flanders Interaction Analysis in the classroom to record verbal behavior, so as to produce a reliable record at the .80 level of reliability when compared with an expert observer.

This does not qualify as a critical competency because of the short time span covered by the activity and because it relates to only one task area. In addition, the act of recording teacher/pupil interaction is not useful in itself; a variety of other kinds of performances would be needed to combine with this performance to make it of value.

To make the performance cited a critical competency, a number of performances might be added. These could include (1) making the appropriate arrangements for going into the classroom, (2) observing in the classroom and recording the observations by using the Flanders interaction analysis system, (3) preparing the matrix, and (4) providing the teacher with objective feedback on the data generated in the matrix. By incorporating these performances, a complex pattern of behavior would evolve, forming a critical competency.

Consider another example:

> Given a group of teachers in a planning session, the supervisor can lead or direct the discussion in such ways as to get involvement by nearly all participants.

Figure 3

CRITICAL ASSESSMENT SCALE FOR COMPETENCY STATEMENTS*
(CASCO)

Assessments By _____ Critical Competency No. _____

Directions: The following 13 characteristics describe potential aspects of a critical competency. In rating each item, please assign a value of 1, 2, or 3 according to the following criteria:

1 - Only slightly or not characteristic
2 - Somewhat characteristic
3 - Distinctly or highly characteristic

I. Prerequisite Characteristics

A. Instructionally Relevant

1. Specifically relates to teaching/learning process_ _ _ _ _ A_1 ☐

2. Relates to influencing learning conditions_ _ _ _ _ _ _ _ A_2 ☐

B. Change Oriented

3. Relates to new programs or practices_ _ _ _ _ _ _ _ _ _ _ _ B_3 ☐

4. Relates to improving existing programs or practices_ _ _ _ B_4 ☐

I. Total for Prerequisite Characteristics ☐

II. Unique Characteristics

C. Complexity

5. More than one task area clearly designated_ _ _ _ _ _ _ _ C_5 ☐

6. Extended time frame required for demonstration of performances indicated_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ C_6 ☐

D. Utility

7. A service or product is clearly described_ _ _ _ _ _ _ _ _ D_7 ☐

8. Service or product is useful in a great variety of educational contexts_ D_8 ☐

E. Reality

9. Conditions under which competency would be demonstrated are specified_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ E_9 ☐

10. Conditions described are widely applicable_ _ _ _ _ _ _ _ E_{10} ☐

F. Predictability

11. High probability of demand for the service or product whenever change is being sought_ _ _ _ _ _ _ _ _ _ _ _ _ _ F_{11} ☐

G. Priority

12. Service or product is essential to the successful change efforts_ G_{12} ☐

II. Total Unique Characteristics (#5 thru #12 only) ☐

III. Global Characteristic

13. Specifies a synthesized pattern of performances rather than a set of discrete performances_ _ _ _ _ _ _ _ _ _ _ III_{13} ☐

Editorial Suggestions
and/or Comments Concerning This
Critical Competency

Do Not Write Below This Line

TOTAL CRITICAL SCALE VALUE (WEIGHTED)
(Official Use Only)
Formula = I + II + 3(III) ☐

This type of performance is important in itself, yet it is not sufficiently complex to be termed a critical competency. The time frame is limited to a maximum of two hours; there is only one task; and thus no pattern of behavior can be developed. A critical competency in leadership of group discussions might include additional performances such as: (1) organizing the group, (2) making the physical arrangements for meetings, (3) briefing the group on the planning problem, (4) providing group members with appropriate background information, and (5) guiding the discussion not only to produce involvement but also to keep the discussion task-oriented while facilitating the consideration of a variety of alternatives. The resulting service or product would be a plan of action supported by a majority of the participants and qualified for approval on the basis of some external criteria of quality.

Utility

A critical competency should have a fairly predictable level of educational or situational utility. This means that in a variety of situations the complex performance as specified should be readily recognizable as task relevant and important to the improvement of the instructional program. A competency which might be appropriate and enthusiastically received in some settings might have little situational utility in others. An example could be a performance involving the review, analysis, and contrast in scholarly terms of two theories of learning. While theory of learning might be a useful tool for an instructional supervisor, the performance of analyzing, contrasting, and interpreting a theory is not in itself likely to have a high level of situational utility.

The fact that knowledge and understanding may manifest themselves in a number of kinds of performances called critical competency should not be

overlooked. For instance, in a critical competency such as designing an inservice training session using the laboratory approach, knowledge of the theoretical frameworks relating to experiential learning, the theoretical constructs concerning communications theory, the place of feedback, and the specificity of feedback would be quite applicable. However, the performance demonstrating cognitive grasp of the theoretical framework in itself has no particular situational utility. The understanding that those theoretical frameworks provide for skillfully demonstrating a particular set of performances might be considered prerequisite, but it does not provide the product that is the concern in specifying critical competencies.

Predictability

A critical competency must comprise a pattern of performances that will be demanded of most supervisors early in their tenure in that position and almost independent of the special characteristics of the position. In this way the training institution can predict, with a high degree of probability, that it meets a widespread need. It is important to realize that supervisory positions vary greatly, ranging from quasi-administrative positions with fairly limited responsibility to offices of great responsibility. The job titles--coordinator, director, resource person, etc.--are not always descriptive of the position.

Some competency statements meet all of the criteria of a critical competency except that of predictability. For example, note the following:

> Given a community program about which there is some unrest, the supervisor can produce a public opinion survey report providing objective evidence regarding the knowledge level and opinions of various segments of the community concerning key aspects of the program; such a survey would be conducted in a sufficiently probing fashion so that the results would indicate which groups needed more information, which were likely to resist programmatic efforts, etc.

This task would involve skills which might be incorporated in a variety of other critical competencies: scientifically sample one or more populations, design opinion and interview instruments, plan questionnaire and interview schedules. The need to analyze data and display the findings in appropriate forms also would suggest a competency statement of relevance to instructional supervision. However, it is unlikely that many supervisors would be called upon to plan, design, organize, and implement an opinion survey. Although it might be a high priority competency under certain conditions, it is more likely that most supervisors would contract with an outside agency for such a survey.

THE MAJOR COMPETENCIES

Following is an explanation of and outline of the major competencies and performances for each sub-set. These performances are specified in relation to their applicability for instructional leadership personnel. Their selection was based on assumptions about on-the-job change-oriented responsibilities and on the distinction between instructional leadership required by supervisors and that required by administrative leadership personnel. Each sub-set contains more items than any one agency or organization could require at a given time, but more important, it contains the essential items that predictably are in the most constant demand. The assumption is made that the behavior identified as specific competencies will be essential elements of the major competencies.

A-1 Setting Instructional Goals: Given a mandate to clarify major goals of instruction, the supervisor can lead groups of parents, citizens, specialized personnel, teachers, and pupils through a series of discussions, presentations, training sessions, and other experiences to produce a report showing some of the most important instructional goals on which there is agreement.

a. Can exhibit a variety of effective procedures for leading groups in a goal-setting session.

b. Can use graphic, analytic or illustrative techniques to clearly differentiate ideals, goals, and objectives, while showing their inter-relationships.

c. Can organize and make arrangements for participants to contribute their input and share fully in the decision-making process.

d. Can write clear statements of instructional ideals and goals that define learning outcomes at different levels of complexity.

A-2 Designing Instructional Units: The supervisor can design instructional units which specify performance objectives, instructional sequences, a variety of appropriate teaching/learning activities, materials, and evaluative procedures.

a. Can write statements of performance objectives at varying levels of complexity.

b. Can select and describe a rationale for the strategy upon which a unit is developed.

c. Can select, describe, and sequence a variety of instructional activities for assuring active involvement by all students in the learning process.

d. Can describe teaching procedures including illustrative questions, outlines of content, and specific illustrations to assure meaningful learning.

A-3 Developing and Adapting Curricula: Having secured innovative curricula developed outside the school or district, the supervisor can adapt the curricula to meet the needs of a student or student group, and make them available to local personnel for use in guiding instructional planning.

a. Can select instructional goals and objectives that have highest priority for specific pupils within the school or district, and can justify these priorities in terms of student interests, needs, and abilities.

b. Can edit and revise activity descriptions to make them more appropriate to student needs.

c. Can reorganize curriculum materials for reproduction and distribution according to student needs.

d. Can design tests, work sheets, and illustrations to supplement or substitute for materials provided.

DEVELOPING LEARNING RESOURCES

B-1 Evaluating and Selecting Learning Materials: Given expressed needs for learning materials, the supervisor can develop a set of evaluative criteria and procedures to determine the quality, utility, and availability of learning materials, and can organize and conduct review sessions where teachers and other personnel can apply the criteria to new materials and make recommendations for acquisitions in needed areas.

a. Can specify the criteria of quality, utility, and availability that will be considered in evaluating and selecting learning materials.

b. Can design an instrument for objectively assessing new learning materials on specified criteria.

c. Can train and direct instructional personnel in using materials evaluation instruments in selecting instructional material.

B-2 Producing Learning Materials: Given learning needs and a curricular design to meet those needs, the supervisor can arrange for the production of the necessary learning materials to complement, fulfill, and/or enhance the aims of the curriculum.

a. Can secure and adapt or produce learning material that stimulates active, meaningful, purposeful involvement of students in attaining specific learning.

b. Can produce written materials for use by pupils, e.g., programmed material, workbooks, etc.

c. Can operate media production equipment including sound recorders, videotape recorders, and some graphic or photographic producers.

B-3 Evaluating the Utilization of Learning Resources: Given an array of learning resources currently available for use, the supervisor can design and conduct a study to determine the extent and appropriateness of their utilization, and, based on the results of that study, can make recommendations for the improved utilization of specific learning resources in specific ways.

a. Can specify criteria to be used in evaluating resource utilization.

b. Can design instruments to objectively measure both extent and appropriateness of resource utilization.

c. Can propose recommendations for improving utilization of resources, based on the data received from an evaluation.

STAFFING FOR INSTRUCTION

C-1 Developing a Staffing Plan: Given a new project proposal which specifies budget, general objectives, and operational procedures, the supervisor can describe essential staff positions to be filled, develop job descriptions for each, and specify the competencies required of the individuals who will fill the positions.

a. Can prepare a written proposal justifying staff positions necessary to accomplish specified outcomes.

b. Can write definite job descriptions providing a full array of information which distinguishes each position, accurately informs applicants, and guides the referral process.

c. Can specify both basic and specialized competencies that are desired in a person who will fill each position described.

C-2 Recruiting and Selecting Personnel: Given a description of several staff positions to be filled, the supervisor, by engaging in a variety of selective recruitment activities, can secure a list of several possible applicants from various sources, can systematically secure and validate relevant information on the applicants by conducting personal interviews, by checking with previous employers, and by using other selection procedures, and can prepare a set of recommendations for filling the vacancies with the applicants who will best fulfill job requirements.

a. Can identify several sources of possible applicants, outline efficient procedures for locating interested individuals, and specify least useful or non-productive procedures to be avoided.

b. Can construct or adapt forms, specify sources of the most relevant information about applicants, and specify least useful or unreliable information to avoid.

c. Can conduct an effective interview with applicants to secure relevant information, avoiding time-wasting, anxiety-producing, and information-losing behaviors.

C-3 Assigning Personnel: Given the task of assigning new personnel and reassigning currently employed personnel to achieve instructional improvements, the supervisor can analyze the needs, expectations, and composition of existing staff groups in various units, and, based on that analysis, can prepare and justify recommendations for assigning and reassigning staff members to positions for optimum educational opportunity.

a. Can assess the competency needs of an existing program or district with respect to personnel assignments that would be necessary to enhance the instructional process.

b. Can identify the special competencies of staff members that could potentially lead to improvement in the instructional process.

c. Can prepare recommendations for assignments utilizing the special competencies of staff members to better fill the assessed needs.

D-1 Revising Existing Structures: Having determined the strengths and weaknesses of an existing organizational structure, the supervisor can propose carefully reasoned or research supported changes, which may include the alteration of assignments, of the use of staff time, of the required reporting patterns, or of the allocation of resources to improve efficiency, productivity, and morale, and, in so doing, improve the instructional process.

a. Can prepare and utilize criteria, emphasizing operational events, to assess the strengths and weaknesses of an existing organizational structure.

b. Can detail two or more organizational charts showing alternative ways of organizing personnel to define roles and relationships.

c. Can draft a rational, research supported, and cooperatively developed proposal for an alternative structure to eliminate a weakness in a program.

D-2 Assimilating Programs: Given a successful instructional program operating within a center, school, classroom, or other unit, the supervisor can design a plan for the smooth integration of the entire program or selected components thereof into a larger system, prepare a timetable and assignments for the transferring of responsibilities, and assure that the instructional improvement evidenced in the program is continued in the system to which it is transferred.

a. Can discuss with key individuals throughout the system the advantages of assimilation in such ways as to secure understanding and acceptance of a new program plan.

b. Can design an assimilation strategy that is reasonably acceptable to all concerned and which utilizes representatives of all groups in the assimilation process.

c. Can develop a detailed plan for assimilation, depicting timetables, reassignment of personnel and retraining needs.

D-3 Monitoring New Arrangements: Given the task of implementing a new organizational arrangement, the supervisor can determine reporting procedures, compare actual operations with planned developments, and when necessary, make recommendations to modify operations to bring them into agreement with formulated plans.

a. Can redesign arrangements for reporting procedures throughout an organization which will maximize the efficiency of such reporting, providing more and better information, with less time consumed.

b. Can collect pertinent data concerning program operations using observation schedules, interview schedules, and checklists, and can show relationships between actual events and projected goals and schedules.

c. Can orally present recommendations for specific alterations in procedures, roles, and schedules to insure that the program will attain the desired ends, utilizing visual, graphic, and other media as needed to clearly communicate changes needed.

UTILIZING SUPPORTING SERVICES

E-1 Analyzing and Securing Services: Given a need for a supporting service, the supervisor can develop a list of sources from which to secure various services, and can describe situations and problems requiring supportive personnel.

a. Can prepare a directory of sources of supporting services available in a community, clearly describing the distinctive services offered by each agency or source.

b. Can survey and describe situations and problems where specialized personnel need to be utilized to enhance the instructional program.

c. Can prepare a plan for involving specialized personnel from within and from outside the district, justifying each involvement in terms of support services needed for improvements.

E-2 Orienting and Utilizing Specialized Personnel: Given a need for specialized assistance, the supervisor can secure the services of a variety of resource persons and can make arrangements for these persons to contribute their unique expertise to improve staff competence in specific areas.

a. Can orient support personnel to the new situation so that he/she can adapt his/her services to meet the needs of the recipients.

b. Can specify within a limited number of alternatives the expected outcomes of the service.

c. Can structure a resource person's task to make maximum use of his/her expertise, while allowing him/her the opportunity to arrange a presentation with which he/she feels comfortable.

d. Can maximize the effectiveness of services by providing evaluative feedback concerning the contributions of resource persons in specialized areas.

E-3 Scheduling Services: Given diagnoses of pupils' needs and regular instructional personnel, the supervisor can propose a set of schedules to distribute services appropriately, to balance the loads of the staff members who provide services, and to provide an opportunity for recipients of the services to maintain maximum involvement in their school programs.

a. Can prepare a service delivery schedule, including the available resources, the services needed and the transportation available.

b. Can select from several proposed schedules the most effective one for meeting students' needs, and can justify the selected schedule in terms of efficiency, economy, feasibility, legality, and other considerations.

c. Can formulate a large scale master plan for the delivery of services showing consideration of staff involved, pupils to be served, services to be rendered, the utilization of time and space, costs involved, and instructional appropriateness.

E-4 Evaluating the Utilization of Services: Given a plan for providing better supporting services within a district, the supervisor can compare that plan with the current operation by utilizing objective data gathered in accordance with previously identified criteria and can propose recommendations that would increase the effectiveness and quality of the system.

a. Can specify criteria for evaluating the utilization of supporting services.

b. Can gather evaluative data concerning the effectiveness of the utilization of supporting services.

c. Can use the evaluative data to compare the current operation with the proposed goals.

PROVIDING IN-SERVICE EDUCATION

F-1 Supervising in a Clinical Mode: Given a teacher experiencing difficulties within a classroom, the supervisor can lead the teacher through a clinical cycle using classroom observation data, non-directive feedback techniques, and various planning and in-service experiences to produce significantly improved teacher behavior.

a. Can use more than one observation system to record objective data during live or taped teaching situations.

b. Can use objective observation data to provide feedback to the teacher and to evaluate periodically the teacher improvement process.

c. Can instruct a teacher to use various observation instruments so that he/she can become familiar with the systematic observation process.

d. Can select and arrange for special opportunities for a teacher to learn to change classroom practices as indicated by cooperative planning.

F-2 Planning for Individual Growth: Given a teacher and data concerning various facets of his/her on-the-job performance, the supervisor can assist the teacher in establishing individual professional growth plans which include objectives for change in classroom practices, a schedule of experiences sequenced for continuous stimulation and growth, criteria specified for interim and terminal evaluation, and a specified period for accomplishing the objectives.

a. Can instruct a teacher to write behavioral change objectives using terms that depict observable behavior or professional significance.

b. Can use PERT or other planning systems to plan and guide sequenced activities leading to a predetermined goal.

c. Can utilize cooperative planning procedures that involve the teacher in the formulation and implementation of an individual professional growth plan extending over several months.

d. Can assist the teacher in determining procedures for objectively evaluating personal growth.

F-3 Designing In-Service Training Sessions: Given a description of a specific staff group, including description of their needs for training, the supervisor can design or adapt a training session plan specifying objectives, activities, procedures, materials, and methods for evaluation to assure participant interest, involvement, and learning.

a. Can specify clearly and state in advance of a session the expected outcomes for participants in terms of professional practices.

b. Can design a complete training session with carefully described, logically sequenced activities and supportive materials, all appropriate to specified outcomes.

c. Can describe follow-up activities that will allow session participants to practice, improve, solidify and/or retain what they have learned during a session.

d. Can design instrument(s) for gathering data on both outcomes and processes of a session, and can describe procedures for analyzing such data.

F-4 Conducting In-Service Training Sessions: Given a description of a specific staff group, the supervisor can select an appropriate training plan, make arrangements, and lead participants through a sequence of meaningful learning activities.

a. Can establish in participants a psychological "set" or readiness for the activities and events associated with a program.

b. Can guide and direct activities in ways that maintain participant interest and involvement.

c. Can demonstrate sensitivity to participants' feelings and personal concerns during a session, without being diverted from planned activities and outcomes.

d. Can build group cohesion, encourage and support spontaneous interactions, and project enthusiasm.

F-5 Training for Leadership Roles: Given individuals who have demonstrated both a high level of competence in a specific area and emergent leadership capabilities, the supervisor can train these people to conduct in-service sessions and to provide follow-up activities that result in the improvement of instructional skills.

a. Can identify skills or abilities of potential leaders and match them to training requirements.

b. Can demonstrate basic leadership techniques from which participants can learn.

c. Can organize and direct training sessions for potential leaders, using micro-teaching, role-playing, videotaping, and in-service simulations.

d. Can provide participants with evaluative feedback that will assist them in becoming more effective in their leadership roles.

RELATING TO PUBLIC

G-1 Informing the Public: The supervisor can establish, promote and maintain favorable impressions of public school programs among community members by disseminating school information through the public media, by speaking to public and school groups, by conferring with parents and other interested individuals, and by meeting, as necessary, with community groups and leaders.

a. Can select and synthesize school program information and arrange for its dissemination via oral and written presentations and use of mass media channels.

b. Can establish good rapport with the public and stimulate a high interest level in education on the part of parents and other community individuals or groups.

c. Can guide staff personnel to initiate more public contacts, to establish rapport, and to provide better information about the school program.

G-2 Involving the Public: The supervisor can plan ways in which parents and other interested individuals can become productively involved in and trained to assist at various levels of the special education program.

a. Can develop a systematic recruitment program for obtaining parent and community volunteers to assist in various aspects of the school program.

b. Can prepare packets of material that would assist individuals in gaining information about volunteer activities in the school.

c. Can develop a plan for assigning and scheduling volunteer workers in the area of their expertise and/or where they are needed most in the school program.

G-3 Utilizing Public Opinion: Given public opinion data regarding a special education matter, the supervisor can establish the urgency of the topic, determine the validity of the data, and, as appropriate, utilize the data in the decision-making process regarding initiation of new aspects, or the maintenance, revision, or discontinuation of current programs or practices.

a. Can arrange for sampling opinions, utilizing appropriate survey instruments and statistical procedures, and can make proper inferences from data collected.

b. Can analyze attitudes and opinions of recognized leaders and informal groups within the local community.

c. Can utilize public opinion data in making decisions about curriculum changes and/or other aspects of the school program.

VALIDATION OF COMPETENCIES

Validation of the critical competencies was conducted in a national study of special education supervisors (Gruber, 1974). The purpose of this validation study was twofold: (1) the extent to which the behavior is currently practiced in the field by persons serving as special education supervisors; and (2) the perception of special education supervisors as to the competencies that should be included in an ideal training program for the preparation of special education supervisors. In addition, the study was to determine if there were regional differences in the ranking of the importance of the SEST competency statements.

The study used a national sample of special education supervisors in local education agencies to rank the competencies on the specified criteria. The total sample of supervisors was divided into ten general regions, with each region randomly divided into two groups. Those ranking current practice placed the competencies in four columns, ranging from definitely practiced to not practiced, according to their perception of the extent to which the competency is practiced. Supervisors ranking the competencies according to an ideal training program placed nine competencies in each of four columns, ranging from definitely should include to probably shouldn't include, according to importance.

Five extra competency statements were added to the array of 31 critical competencies specified by the SEST Project. The extra statements were carefully worded to describe performances that were outside the scope of instructional leadership behavior as defined by the conceptual model employed to

generate the critical competencies. In this way the study not only provided a verification of the critical competencies as specified, but also provided an indication of the extent to which performances outside the scope of the project were perceived as practiced in the field and important to an ideal training program. After a pilot test and revision, instruments were mailed to 714 supervisors. Instruments were returned by 520, or 73%, of the supervisors. Analysis of variance was used to determine significant differences, and Duncan's New Multiple Range Test was used to determine where the differences occurred.

Following is a summary of the most widely practiced critical competencies for which training would be considered ideal by a national sample of special education supervisors. Asterisks identify the extra competency statements which were among the 10 most highly selected. Other competencies are identified with the same designations used elsewhere in this document.

When asked about competencies in current practice, special education supervisors showed ten top priority performances among the 36 competencies listed. Three of those with the highest mean rating were selected from the extra competency category defined by the Project staff as non-change oriented and not directly related to improvement of instruction. The other seven included one from each of six different task area, with only one of the eight task areas omitted from this high priority group. Following is a rank order list of the top ten items.

1. Utilizing Time*
2. Acquiring Relevant Data*
3. Designing Budgetary Recommendations*

*Not included in the critical competency list.

4. Utilizing Human Resources (F-4)

5. Selecting Personnel (now incorporated into competency (C-2), Recruiting and Selecting Personnel)

6. Specifying New Job Descriptions (now incorporated into competency (C-1), Developing a Staffing Plan)

7. Providing Information Programs to the Public (G-1)

8. Securing New Supporting Services (now incorporated into competency (E-1), Analyzing and Securing Services)

9. Scheduling Services (D-3)

10. Securing Learning Resources (non-material) (B-2)

An assessment of ideal competencies revealed that the ten critical competencies with highest mean quartile ranks included two extra statements. Inservice Education was seen as the most important part of an "ideal" supervisor training program, with three out of ten selected from this task area. No competencies from the task areas of Developing Curriculum, Developing Learning Resources, and Organizing for Instruction were perceived by special education supervisors as among the most important for supervisor training programs. The ten competencies with highest mean quartile ranks follow.

1. Supervising with the Clinical Model (F-1)

2. Designing Budgetary Recommendations*

3. Providing Information Programs to the Public (G-1)

4. Planning for Professional Growth (F-2)

5. Specifying New Job Descriptions (now incorporated into competency (C-1), Developing a Staffing Plan)

6. Utilizing Human Resources (F-4)

7. Acquiring Relevant Data*

8. Selecting Personnel (now incorporated into competency (C-2), Recruiting and Selecting Personnel)

*Not included in the critical competency list.

9 & 10. Securing New Services and Analyzing Services and Sources (the two have now been combined into one competency (E-1), Analyzing and Securing Services)

The results on the selection of competencies by regions were used to determine which should be included in a training program. Competencies rated high in all regions would be included in all programs; others would be optional, depending on the type of program being conducted. Follow-up studies are being conducted to determine the expectancies for prospective supervisors as they are interviewed for positions.

IV

PROGRAM MODEL

The Competency-Guided Training Program is based on several fundamental assumptions. The role of the instructional supervisor, whatever his or her title may be, is assumed to be that of an agent of change for improving instruction, not one who only maintains programs. A set of competency-guided assumptions, outlined in Chapter III, derive from an overarching assumption that all training experience should in some way be related explicitly to professional performance. It is assumed that the development of professional leadership performances is a lifelong process and thus cannot be completed in an intensive formal training program. A further assumption is that professional supervisory competencies are explicitly related to instructional change process. The notion is rejected that supervisory competencies are essentially extensions of those for teachers. Therefore, the wide variations in the training and experimental background of trainees upon entering the program necessitate differentiation of program experience to assume optimum growth for each individual. The program should be designed to provide an array of integrated on-campus and field experiences.

BASIC PROGRAM COMPONENTS

1. Field experience — exploratory, interning, special project
2. Formal courses — theory, skill building, evaluation, planning sharing, decision
3. Independent study -- learning lab, library, other
4. Special laboratory or other special experiences (CIA decision-making, competency-assessing, visiting lectures, minicourse, trips)
5. Informal associations, interactions, etc.

A schematic view of the program components is shown in Table 4. Within these components are a wide variety of potential activities. A description of the major ones follows.

TRAINING COMPONENT ACTIVITIES*

1. Lecturing - attending a lecture or giving one.

2. Visualized lecturing - either attending or giving a lecture supported by visual or multi media materials.

3. Panel presenting - attending or participating in a panel presentation or debate, whether formal or informal.

4. Viewing film or television - viewing or presenting video tape, broadcast, or closed circuit television or films.

5. Listening to tape, radio or recordings - listening to or presenting tapes, sound recordings, or radio broadcasts. This activity would also include taping and play back of interviews, role-playing sessions, or group discussions.

6. Exhibiting - viewing an exhibit or the arrangement of an exhibit.

7. Observing in classrooms - observing with an instrument only.

   a. Observing without an instrument - observing a teacher, a particular child, a negotiation session, etc. without a formal instrument. This does not include direct participation in the flow of events.

8. Demonstrating - viewing or presenting a demonstration.

9. Structured interviewing - imparting or soliciting information, ideas, opinions, etc. through the use of a predetermined set of questions.

10. Focused interviewing - either interviewing or being interviewed in a semi-structured way about a particular situation or event.

*Based on activities described by Ben M. Harris in Supervisory Behavior in Education, 2nd Edition. Englewood Cliffs, N.J.: Prentice Hall, Inc., 1975.

11. Nondirective interviewing - interviewing or being interviewed in an in-depth situation focusing on attitudes, feelings, and self-analysis of performance.

12. Discussing - participating in or leading informal, loosely structured, task-oriented small groups. This category also includes specific game-type problems.

13. Reading - reading professional books, in-basket items, case studies, "lesson protocols," etc.

14. Analyzing and calculating - making raw data useful and understanding by the use of graphic analyses, simple tabulations and indices, etc.

15. Brainstorming - a group activity centered around the generation of as many ideas about a particular topic as possible within a short time frame. It is distinguished from other group activities by its atmosphere of acceptance of all kinds of ideas.

16. Videotaping and photographing - securing visual images (films, slides, photographs, or videotapes) or being filmed for in-service curriculum development, or public relations purposes.

17. Instrumentation and testing - either being tested or designing, adapting, or using instruments such as questionnaires, rating scales, inventories, etc.

18. Buzz sessions - intense, small group discussions about a particular topic, resulting in a report given to a larger group. It is distinguished from brainstorming in that the ideas of group members are evaluated, criticized, and defended.

19. Field trips - visiting educational sites, job-related community businesses, etc. for in-service or orientation, making home visits.

20. Intervisiting - peers observing the working situation of another peer; should be characterized by planning, use of an observation guide, and interaction following the observation period.

21. Role-playing - a type of reality practice used extensively in simulation games, particularly those concerned with human relations training.

22. Writing - all writing activities, from memos to journal articles.

23. Guided practice - individualized, supervised practice without the pressures or a real-life situation.

24. Designing or producing materials and media - original creation of new products; can include the activities related to the arrangements necessary for such production.

25. Other - unusual activities previously described

Table 4

TRAINING COMPONENTS AND ACTIVITIES

	Fall Semester		Spring Semester	
Type of Experience	Percent of time	Activities	Percent of time	Activities
Field Experiences	20	Exploratory work with students Group field training Exploratory work in other field situations Special practicum	38	Supervision of student teachers Intensive field internships Activities and observations Group training activities Special field projects Special activities related to field assignments
Independent Study	20	Reading Project and assignments for classes Use of special material selected by needs	17	Reading Project and assignments for classes Use of special material selected by needs
Campus Classes	30	Scheduled classes	20	Scheduled classes
Project Development	20	Selecting and evaluating materials Developing new training materials	15	Selecting and evaluating materials Developing new training materials

Table 4 (continued)

	Fall Semester		Spring Semester	
Type of Experience	Percent of time	Activities	Percent of time	Activities
Project Development (continued)	20	Selecting and evaluating resource people	20	Selecting and evaluating resource people
		Developing and testing assessment techniques		Developing and testing assessment techniques
		Writing and refining documents for publication		Writing and refining documents for publication
		Evaluating the Project; planning for continuation		Evaluating the Project; planning for continuation
Special Activities	10	Workshops, conferences, field trips, etc.	10	Workshops, conferences, field trips, etc.

PROGRAM EXPECTATIONS

Roles

Students participate in the Project in both of these roles: (1) as graduate students, and (2) as Project Associates committed to developing and improving the Project. Specific student teaching, supervision or research responsibilities are not tied to the monthly stipend; however, a percentage of the students' time is regularly devoted to Project development activities. These may include such things as writing, providing feedback, evaluating, reviewing materials, etc.

During both semesters of the long term students work on special field assignments. The fall experience is an exploratory practicum, while the spring experience is an assigned internship. All students are expected to exhibit high professional standards and adhere to all rules and regulations of any organization or institution with which they are working.

Time

The minimum work week of Project participants is, on the average, 45 hours The program is designed as a 200 day (minimum) program. This means that the regular University holiday schedule is not rigidly observed. Reasonable holidays are allowed, but students are expected to approximate the on-the-job schedule of practicing special education supervisors in the local school districts. Personal matters are attended to on one's own time whenever possible.

Commitment

Students are expected to accept much of the responsibility for the success of their experience during the time they are participants on the Project. Students take initiative in structuring experiences, preparing themselves for activities, requesting needed assistance, and in general, "making things happen." The staff is dedicated to the Project and committed to providing as much "process" guidance as needed by students.

This project was funded to develop and evaluate a system for training supervisors. Though no contact or formal commitment is involved, it is expected that participants will return to the field after completing the program and diligently seek employment as Special Education Supervisors. If a student does not intend doing this, this is made explicit from the beginning. People interested in pursuing a doctoral degree in the immediate future are not considered for this program except with the clear understanding that SEST is not a doctoral program.

Because of the time commitment that this project entails, there is little room for special activities, part-time jobs, other degrees or certificates, additional classes, etc. When done properly, the Project is all one has time for. Also, for these reasons, no part-time students can be considered.

Personal Growth

The Project staff believes that human resource development, defined as the personal development of productive, honest nonmanipulative interaction with other people, is of prime importance on this Project.

Students therefore, are expected to participate in a number of activities and are given options on other activities that will focus on their personal growth in such areas as giving and receiving feedback, developing assertive skills and dealing with emotional situations, and to enhance them as persons and improve their own skills in these areas. Structured activities include working in groups with other students, role playing, participating in video feedback sessions, etc. Other informal activities are encouraged to support the formal activities that are planned on the Project.

Academic Load

To meet program competencies, as well as State requirements for certification, students register for up to 15 hours during each semester of the long term, and up to 6 hours during the first summer session. Possible exceptions are made if a number of the certification requirements have been met prior to joining the Project. Individual programs are developed for each student in accordance with past academic work and present competency level.

Special Privileges

In addition to the above expectations, it is also anticipated that the students will have an enjoyable, profitable learning experience. To that end, the following are components of the program:

Travel allowance to attend conferences, workshops and special activities, both in Texas and nationally.

Stipends that are tax free.

Specifically arranged field assignments and field projects in one's area of interest.

A considerable amount of staff time (staff:student ration is 1:3).

A happy environment in which to work.

Time Allocations

The approximate percentage of time allocated to each major component and type of training experience is shown in Table 5. These allocations serve as guidelines for planning and scheduling activities. They are not prescriptions; in fact, individual trainee schedules are expected to vary from these allocations.

Specific time allocations which guide overall program design and give direction to individual activity schedules include the following:

A 200 day (2.000 hour) program is regarded as minimal

Exploratory field experiences are expected to average 10 to 12 hours each week for each trainee

Internship field experiences are planned for a minimum of 20 hours per week

Independent study, formal courses, workshops, field trips and other special experiences tend to be highly individual matters, even though a common core of course work is maintained for all.

The allocations of time components A (field experiences) and C (academic classes) combined provide over one-third of the entire program off-campus in the "real" professional world. The heavy allocations to component D (independent study) allow for considerable self-pacing.

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Table 5

TIME ALLOCATIONS FOR
PROGRAM COMPONENTS AND ACTIVITIES

	Type of Activity	Estimated Hours Allocated Fall	Spring	Summer	Total	Percentage Fall	Spring
A.	Field Experiences						
	1. Exploratory	150			150		
	2. Internship		350		350		
	3. Supervision of Student Teachers	20	20		40		
	4. Special Group Activities (Observations, Surveys, etc.)	20		10	30		
		190	370	10	570	20	37
B.	Independent Study						
	5. Reading, Testing, Diagnostic Analysis of Competency Needs	150	75	100	325		
	6. Assignments for Classes, Including Individual Projects and Consultations with Faculty	150	100	50	300		
	7. Use of Learning Lab Packets and Computer Programs	100	100	60	260		
		400	275	210	885	20	17
C.	Academic Classes (on campus)						
	8. Regularly Scheduled	180	115	75	370		
	9. Special Workshops, Visiting Lecturers, etc.	20	5	5	30		
		200	120	80	400	30	20
D.	Project Development					20	15
E.	Special Off-Campus						
	10. Workshops, Conferences, Field Trips, Etc.	60	95		155	10	10
	Total All Program Experiences	850	860	300	2,010	100	99

FORMAL COURSE COMPONENT

Formal coursework constitutes a significant part of the program. Inherent in the training program is the fact that trainees will have to meet some basic requirements for degree completion and/or supervisor certification. Courses usually are applicable for both types of requirements.

To obtain a current, up-to-date theoretical background as well as skills in supervision, evaluation, planning and decision-making, trainees usually engage in coursework that widely integrates general and special education faculties. As a result of this interface between general and special education, trainees gain added expertise in:

1. human growth and development and learning theory
2. several areas of exceptionality
3. general supervisor and/or administrative theories and curriculum development
4. understanding the community structure and its relationships and interaction with special education programs
5. developing in-service education programs and procedures
6. research techniques
7. understanding and developing personal, human interaction skills important to the supervisory process

Examples of the typical courses taken by trainees are as follows:

1. Organizational Theory in Education
2. Administration of Special Education Programs
3. Practicum in Instructional Supervision
4. Systems for Observation and Analysis
5. Designing In-Service Education Programs

One aspect of the SEST Project was to determine the relationship between the courses offered and the competencies developed by the Project for special education supervisors. This was done under the assumption that once the courses were broken down into specific competencies, it would increase the amount of individuality offered by the Project. It would then be possible for trainees to focus on certain areas of particular courses depending upon their diagnosed competency needs.

A preliminary survey of the course/competency relationship has been completed for the courses offered by the Department of Educational Administration at The University of Texas at Austin. Each professor was asked to indicate the critical competencies emphasized or discussed in each of his or her courses. After identifying the critical competencies for each course, each professor was then asked to determine the major competencies covered, at least on a limited basis. Information also was gathered on any special materials or techniques utilized in these courses which could be related to the identified competencies.

Of the 17 courses surveyed which were or could be closely related to the Project, information regarding critical competencies for only 12 courses was received. (See Figure 4) Information regarding major competencies was received for only eight courses. Difficulty in obtaining information regarding the competencies emphasized in these courses was probably due to the lack of interrelated planning between the different programmatic directions of the department. A possible outcome from the determination of the course/competency relationship could be a reduction of duplication of course content and a needs assessment type of feedback regarding those areas in administration or supervision receiving little or no emphasis.

Figure 4

SURVEY OF COMPETENCY EMPHASIS IN COURSES (Sample form)

Department of Educational Administration — Professional Supervisory Competencies

Course: Ed. A. 384G Inst. Super. Instructor: Harris Semester: (F) (Sp) (S) Date: April, 1975

Critical Competencies	I.	II. Major Competencies	III. Emphasis*	IV. Special Materials
A. Developing Curriculum				
1. Setting Instructional Goals				
2. Designing Instructional Units				
3. Developing & Adapting Curricula				
B. Developing Learning Resources				
1 Evaluating & Selecting Learning Materials				
2. Producing Learning Materials				
3. Evaluating the Utilization of Learning Resources				
C. Staffing for Instruction				
1. Developing a Staffing Plan	✓	C-1a C-1c	o, o	
2. Recruiting & Selecting Personnel	✓	C-2b	o	
3. Assigning Personnel				
D. Organizing for Instruction				
1. Revising Existing Structures				
2. Assimilating Programs	✓	D-2a D-2b	o, o	
3. Monitoring New Arrangements				
E. Utilizing Supporting Services				
1. Analyzing & Securing Services				
2. Orienting & Utilizing Specialized Personnel				
3. Scheduling Services				
4. Evaluating the Utilization of Services				

* + (strong emphasis) o (cursory or limited emphasis)

Figure 4 (continued)

Department of Educational Administration

Professional Supervisory Competencies

Course: Ed. A. 384G Instr. Super. Instructor: Harris Semester: (F) (Sp) (S) Date: April, 1975

Critical Competencies	I.	II. Major Competencies	III. Emphasis*	IV. Specific Materials
F. Providing In-Service Education				
1. Supervising in a Clinical Model	✓	F-1b	o	
2. Planning for Individual Growth				
3. Designing In-Service Training Sessions	✓	F-3d	+	
4. Conducting In-Service Training Sessions				
5. Training for Leadership Roles				
G. Relating to Public				
1. Informing the Public				
2. Involving the Public				
3. Utilizing Public Opinion				

* + (strong emphasis) o (cursory emphasis)

Figure 4 (continued)

(Sample form)

Department of Educational Administration — Professional Supervisory Competencies

Course: 382 T Admin. Ind. School Instructor: Ashbaugh Semester: (F) (Sp) S Date: April, 1975.

Critical Competencies	I.	II. Major Competencies	III. Emphasis*	IV. Special Activities
A. Developing Curriculum				
1. Setting Instructional Goals	✓	A-1a		Principals Audio Journal
2. Designing Instructional Units				
3. Developing & Adapting Curricula				Simulation case-studies
B. Developing Learning Resources				
1. Evaluating & Selecting Learning Materials				
2. Producing Learning Materials				
3. Evaluating the Utilization of Learning Resources				
C. Staffing for Instruction				
1. Developing a Staffing Plan	✓	C-1a, C-1c		
2. Recruiting & Selecting Personnel				
3. Assigning Personnel	✓	C-3a, C-3b		
D. Organizing for Instruction				
1. Revising Existing Structures	✓	D-1a, D-1b, D-1c		
2. Assimilating Programs				
3. Monitoring New Arrangements	✓	D-3a, D-3b, D-3c		

* + (strong emphasis) o (cursory emphasis)

Figure 4 (continued)

(Sample form)

Department of Educational Administration — Professional Survey Competencies

Course: 382 T Admin. Ind. School Instructor: Ashbaugh Semester: (F) (Sp) S Date: April, 1975

Critical Competencies	I.	II. Major Competencies	III. Emphasis*	IV. Special Activities
E. Utilizing Supporting Services				
1. Analyzing & Securing Services				
2. Orienting & Utilizing Specialized Personnel				
3. Scheduling Services				
4. Evaluating the Utilization of Services				
F. Providing In-Service Education				
1. Supervising in a Clinical Model				
2. Planning for Individual Growth				
3. Designing In-Service Training Sessions				
4. Conducting In-Service Training Sessions				
5. Training for Leadership Roles				
G. Relating to Public				
1. Informing the Public				
2. Involving the Public				
3. Utilizing Public Opinion				

* + (strong emphasis) o (cursory emphasis)

Figure 4 (continued)

(Sample form)

Department of Educational Administration — Professional Supervisory Competencies

Course: Ed A 385 Pract. Inst. Super. Instructor: Harris Semester: (F) Sp S Date: January, 1975

Critical Competencies	I.	II. Major Competencies	III. Emphasis*	IV. Special Activities
A. Developing Curriculum				
1. Setting Instructional Goals				
2. Designing Instructional Units	✓	A-2a, A-2b	o	Sample LAP's from Post
3. Developing & Adapting Curricula				
B. Developing Learning Resources				
1. Evaluating & Selecting Learning Materials				
2. Producing Learning Materials				
3. Evaluating the Utilization of Learning Resources				
C. Staffing for Instruction				
1. Developing a Staffing Plan				
2. Recruiting & Selecting Personnel	✓	C-2c Effective interviewing	o	Lab session-Styles of interviewing
3. Assigning Personnel				
D. Organizing for Instruction				
1. Revising Existing Structures	✓	D-1a, D-1c	+, +	
2. Assimilating Programs				
3. Monitoring New Arrangements				

* + (strong emphasis) o (cursory emphasis)

Figure 4 (continued)

(Sample form)

Department of Educational Administration

Professional Supervisory Competencies

Course: Ed A 385 Pract. Inst. Super. Instructor: Harris Semester: (F) Sp S Date: January, 1975

Critical Competencies	I.	II. Major Competencies	III. Emphasis*	IV. Special Activities
E. Utilizing Supporting Services				
1. Analyzing & Securing Services				
2. Orienting & Utilizing Specialized Personnel				
3. Scheduling Services				
4. Evaluating the Utilization of Services				
F. Providing In-Service Education				Observation packet 3 film clips
1. Supervising in a Clinical Model	✓	F-1a, F-1b, F-1c, F-1d	+	Lesson protocols
2. Planning for Individual Growth	✓	F-2a, F-2b, F-2c	+	Transparencies
3. Designing In-Service Training Sessions				
4. Conducting In-Service Training Sessions				
5. Training for Leadership Roles				
G. Relating to Public				
1. Informing the Public				
2. Involving the Public				
3. Utilizing Public Opinion				

* + (strong emphasis) o (cursory emphasis)

Table 6

COURSES FOR SUPERVISOR CERTIFICATION
(Example from SEST Program)

COURSE NUMBER	SUBJECT	COMPETENCY	CLASS HOURS
FALL, 1974			
Ed.A. 382M	Organization Theory	A-5	3
Ed.A. 380G	Structure of Public Education	B-3	3
Ed.A. 385	Pract. in Instr. Supervision	B-1	3
Sp.Ed. 383	Pract. in Special Learning Disorders	B-2	3
Ed.A. 383	Design. In-Service Education	B-1	3
			15
SPRING, 1975			
Ed.A. 383	Special Education Adm.	B-2	3
S.W. 395	Human Relations in Social Work	B-2, A-5	3
Ed.C. 381M	Design for Instruction	B-3	3
Ed.A. 397P	Internship in Supervision	B-1	3
Ed.A. 384G	Seminar in Supervision	B-1	3
			15
SUMMER, 1975			
Electives including work outside of education		B-3, A-5	6
		Total	36

FIELD EXPERIENCE COMPONENT

The training model emphasizes the importance of field experiences for developing and testing competence in a prospective supervisor. These opportunities are provided by field-based supervisors from local school districts, education service centers, state agencies, and private schools.

The trainees, most of whom have a master's degree, are experienced teachers and concerned professionals. They are individuals who are capable of providing a district or institution with substantial service in return for an opportunity to observe, share assignments, and assume responsibilities.

Trainees are assigned to exploratory activities in the fall and internship positions in the spring. The former entails 10 to 15 hours per week and involves getting acquainted and assisting activities; the latter comprises 20 or more hours per week and includes handling responsible assignments. Each trainee has a faculty member assigned as the university supervisor. Regularly scheduled meetings of the triad of trainee, university supervisor, and field supervisor should be held to determine goals, review plans, and evaluate progress.

To improve the trainee's ability to demonstrate a certain competency, special projects should be planned cooperatively, which the trainee could undertake individually or as a member of a project team. These projects should become specific assignments, resulting in a finished product or service (usually in an area in which the trainee needs experience) within a given time period. These projects allow trainees to identify a specific thing to do, someone with whom to do it, and an amount of time in which to complete it.

In addition to these project opportunities, it is anticipated that the trainees should be able to assume other responsibilities that are consistent with the roles of consultant, director, coordinator, or trainer. It is important that these experiences be guided by the SEST competency statements.

The task associated with accepting a trainee for field practice is (1) to provide opportunities for real experience in assuming leadership roles to relate to competency needs, (2) to design one more special project that would identify an outcome or product and a specific period of time for accomplishment and (3) to work cooperatively with faculty and trainee(s) in guiding these experiences. In return, the trainee contributes expertise, provides assistance in the field supervisor's work, and leaves the product or results of all special projects.

For the program model, guidelines were developed to clarify the purposes of the program, the obligations of the cooperating institutions, the requirements of the trainee, and the general provisions of the project and its staff. These guidelines, one set for exploratory field services and one for internships, follow.

Guidelines for Exploratory Field Experiences

I. Purposes

A. To gain familiarity with the overall administrative and supervisory structure in the assigned district or educational institution.

B. To gain detailed knowledge about operations of at least one supervisory position.

C. To develop, strengthen or refine competencies in some specific area.

D. To compare and contrast leadership concepts to real situations, problems and people.

II. Cooperating Educational Institution and Supervisor

A. Is asked to acquaint the trainee with the various levels and special projects within the Special Education program.

B. Is asked, whenever possible, to tailor the trainee's opportunities and experiences to some competency needs.

C. Is asked to involve the trainee in a variety of activities that relate to instructional leadership responsibilities. Suggested activities include the following:

1. Selecting and sequencing of instructional materials for a unit or module.

2. Assisting with the writing of educational plans for a student or group.

3. Observing in classrooms and reporting feedback to teachers and supervisors.

4. Conferring with parents or a parent group regarding student needs.

5. Participating in LST and ARD meetings including taking special responsibility for presenting some information to the group.

6. Planning and conducting an in-service training session.

7. Planning and directing a parent education training session.

8. Screening for selecting staff.

D. Is asked to work with the student in deciding on minor projects that would benefit both the district and the trainee.

E. Is asked to arrange for the trainee to attend civic meetings concerning school matters, PTA, study groups, school board meetings, etc.

F. Is asked to introduce trainee to building principals, and explain the trainee's activities which affect that particular school.

G. Is asked to meet regularly with the student and the assigned university supervisor to discuss events, review competency needs and project plans.

H. Is asked to describe the trainee's competencies at the end of his assignment.

III. Trainee

A. Is asked to function as much like a regular staff member as the situation permits; becoming familiar with policies of the assigned institution, respecting the confidentiality of professional relationships, and being responsive to institutional expectations and concerns.

B. Is asked to keep a written record of activities, meetings, conferences and educational trips, and to relate such experiences to specific competencies.

C. Is asked to assume responsibility for the scheduling of meetings with field and faculty supervisors (triad).

D. Is asked to review special project plans with the above supervisors and submit carefully documented reports to them.

E. Is asked to develop a set of prioritized competency needs for future growth planning.

F. Is asked to relate as many on-campus experiences to the field (and vice versa) as possible.

IV. General Provisions

A. Average hours per week in each field assignment should approximate ten (10) unless special provisions are made.

B. The SEST staff will furnish the field supervisor with a student vita, weekly schedule and data sheet of competency needs.

C. The SEST staff will assume the responsibility for explaining the project to building principals, new supervisors within the district and others concerned with the field experiences.

Guidelines for Internship Field Experiences

I. Purposes

A. The over-riding purpose is to provide the trainee with opportunities for developing instructional leadership competencies. To this end, three outcomes are anticipated.

1. To develop those specific competencies assessed as high priority needs.

2. To explore on-the-job situations and problems to gain experience in applying competencies.

3. To develop competencies of special interests to the trainee.

B. Another purpose is to provide some useful professional service to the institution in which the trainee is serving. To this end, trainees are:

1. To assume responsibility for an assigned portion of the work regularly assigned to another supervisor or administrator.

2. To complete one or more special projects for the improvement of instruction.

C. Still another purpose is to provide real but controlled and monitored experiences which facilitate integration of knowledge, skill and attitude into practice.

D. Finally, a purpose is to provide feedback for use in evaluating training program and trainee competence.

II. Cooperating Educational Institution and Supervisor

A. Is asked to involve intern in all operational phases that accompany the particular supervisory position to which he/she is assigned.

B. Is asked to participate in conferences with intern and with university faculty members for exchange of mutual concerns, planning and structuring of learning experiences, diagnosis of competency needs, and evaluation of outcomes.

C. Is asked to introduce intern to building principals, where applicable, and explain intern's duties, projects, etc. which affect that particular school.

D. Is asked to work cooperatively with the intern student in the selection, planning, implementation, and evaluation of special projects of mutual benefit.

E. Is asked to guide intern in assuming significant responsibility in all areas relative to the position to which he/she is assigned.

F. Is asked to allow intern to assume responsibility in civic and community meetings, educational trips, ARD meetings, etc.

G. Is asked to provide opportunities for the intern to use an interaction observation system and report feedback to the teachers observed.

H. Is asked to contact assigned faculty supervisor if any questions or problems arise.

I. Is asked to assist in assessing intern's competencies and other facets of the program at the conclusion of the assignments.

III. Intern

A. Is expected to function as much like a regular staff member as is possible.

B. Is asked to keep a daily written record of activities in a standard format provided by the project.

C. Is expected to respect the confidentiality of the professional relationship and to exercise a full code of ethics in all respects.

D. Is expected to exercise initiative in planning and carrying out activities associated with II D, II F, and II G.

E. Is expected to work closely and cooperatively with assigned field supervisor in undertaking activities associated with II A, II E, and II H.

F. Is expected to submit to appropriate officials and to faculty supervisor a carefully written project report for each special project undertaken.

G. Is expected to undertake readings in appropriate technical-professional sources as related to each special project to provide documentation for decisions, actions, outcomes, or recommendations associated with the projects and their reports.

H. Is expected to exercise the initiative in conferring with his/her field and university supervisor frequently.

I. Is expected to develop and maintain a working schedule for meeting field, campus and special activity requirements in a way that promotes continuity and efficiency in field assignments.

J. Is expected to assume major responsibility for translating campus and special experiences into opportunities for field practice related to competency needs.

IV. General Provisions

A. Unless special provisions are made, interns should plan to remain in a given field assignment for January through May with the same field and faculty supervisors.

B. Field assignments should be individualized within these guidelines to maximize experience and competency development.

C. Field assignments can and should vary from week to week to allow for the demands of both field and campus.

D. Average hours per week in each field assignment should approximate fifteen (15) unless special provisions are made.

E. Interns should be presented in the field as "part-time member of the staff" to avoid unnecessary resistance and assume maximum productivity.

F. The SEST Project staff will assume responsibility for input to building principals about the purposes and activities of the project.

To assist in arranging mutually beneficial assignments for the trainee and the district or agency, field supervisors should identify in advance the experiences they could provide for one or more trainees. A form is provided for transmitting this information (see Figure 5). In this way, agreements can be made that would be most suitable for all concerned.

Figure 5

FIELD SUPERVISOR APPLICATION

SEST Project, 1974-75

(Sample form)

Date _____

Name _____

Place of Employment _____

Position or Title _____

Basic Job Responsibilities _____

_____

1. I _____ would _____ would not like to be considered as a field supervisor for a SEST trainee. (If you would not like to be involved, please stop here and return the form as shown below.)

2. Amount of involvement desired (check all that apply):

   _____ a. working on a continuing basis with a trainee throughout the fall semester

   _____ b. working on a continuing basis with a trainee throughout the spring semester

   _____ c. working for a limited time period with the trainee to guide a specific project assignment in the fall semester

   _____ d. working for a limited time period with the trainee to guide a specific project assignment in the spring semester

3. I _____ would _____ would not be able to meet periodically for three-way conferences to evaluate the trainee's progress and plan cooperatively for approximately 1 1/2 hours every week or two during the period of work with the trainee.

4. I can work with a trainee in guiding the following specific projects: (Please describe briefly. Indicate type of project, anticipated product, and estimated time frame.)

5. The competency areas in which a trainee could get involvement with me would be as follows (check all that apply):

   _____ curriculum development

   _____ learning resource development

   _____ staffing for instruction

   _____ organizing for instruction

   _____ providing supportive services

   _____ inservice education

   _____ providing public relations

   _____ other, specify _____

Please return completed form to: Coordinator of Field Experiences
Department of Educational Adminstration
University of Texas at Austin
Austin, Texas 78712

Determining Objectives for Field Learning

Before setting objectives for field experiences, priorities among the competencies for each student must be established. This requires an overall assessment of the competency needs of each student, followed by a specific assessment for field assignments. Initially the model relies on self-assessment and simulation activities; these form part of a continuing process that later includes field and laboratory assessments.

After the overall program learning needs are identified for each student, the field learning ratings are determined. For example, assume that a student has been evaluated initially in terms of her relative strengths and weaknesses in each competency area and her program learning objectives have been established. If her combined profile, in the judgement of both the student and her advisor's, indicates a need for improvement in several critical competencies, the next step is to determine the extent to which the field should be used as the arena for learning. It is important to note that a critical competency is a composite, or synthesis, of the three domains in the model -- problem-solving, human relations, and job tasks -- domains that are expressed together in real situations as the supervisor accomplished his job. (SEST Project, 1976). This does not imply that all aspects of the domains are employed in a given behavior sequence; rather, it is based on the assumption that some aspects, or subcomponents, of these domains are necessary for each competency. A second assumption should also be noted: that competencies emerge and change in practice over time. Since a competency is not defined by present practice alone, an effective supervisor takes the responsibility for changing and improving current practice, a step that requires some ability to be innovative in each competency area.

In the SEST Project the decision was made to develop field experience plans that meet the selected objectives within a competency-guided format and at the same time do not conflict with the basic assumptions of a competency model. In the field plans, the 27 critical competencies are used selectively to provide a focus for field learning. Selected kinds of tasks typical of the supervisory role defined by these competencies are used to guide the students in the field. Due to limitations of time and settings, the field cannot be used to cover all areas of learning need. Therefore, each student, in agreement with the staff and field supervisors, determines a limited set of priorities for field learning. It is presumed that other learning activities outside of field work can contribute to a student's progress in attaining the critical competencies.

Individualized Field Plans

There are two general phases in the field plans for students:

Phase I - orientation and assessment, designed to determine learning needs in the field and to acquaint students with the broad range of field settings.

Phase II - field learning, designed to provide students with opportunities consistent with their assessed learning requirements.

During Phase I, which takes place in the first part of the training year, the exploratory field supervisor works with the student, orienting him to community services. The model is based on a strong commitment to the theory that supervisors, as decision-makers in children's lives, should be fully acquainted with the diversity of services and programs available to youngsters with handicapping conditions. Since students enter training programs with varied employment and experiential backgrounds, the orientation process is individualized. Some students spend

a number of weeks at two or more facilities for in-depth learning experiences; others investigate a large number of agencies and programs. There is an attempt to involve students, at least in a limited way, in activities representing the 27 critical competencies so that on-going pre-assessment is possible.

During Phase I a number of self-assessment instruments are administered to identify each student's specific areas of strength and weakness relative to the critical competencies. Information obtained from these instruments is the primary source for planning individual field-learning activities, especially for the first semester.

The first instrument is comprised of an open choice assessment of a student's performance on the critical competencies. Performance guidelines are specified; each student uses them to rate his own performance on each of the critical competencies. Values are assigned to each of the performance categories, and total raw and mean scores are obtained for the six clusters, or groups, of related critical competencies. Each student's mean scores for each of the clusters are plotted on a graph indicating relative strengths and weaknesses, as self-perceived. An additional aspect of this instrument involves weighting the competencies in terms of critical importance to job situations, as validated in a national survey of special education supervisors (SEST Project, 1975). Thus, the students are able to compare their self-assessed performance in relation to the priorities -- high, average, or low -- given the 27 competencies in the national survey.

Another self-assessment instrument involves a forced-choice Q sort of the 143 major competencies that are components of the 27 critical

competencies. The students sort a scrambled listing of these major competency statements into four groups, based on their estimate of how well they could perform each function. Data obtained can be used for further validation of the student's assessment of performance. More important, however, is that the findings can be used to provide specific diagnostic objectives for the individual, staff, and field supervisors to use in planning individualized field-learning assignments for Phase II of the field experience.

Another component of the self-assessment is a checklist of 246 specific competency activities that a special education supervisor might become involved in as part of his job. Each student indicates the amount of experience he has had with each activity -- no experience, some, or considerable. Information obtained from this checklist, combined with the two self-assessment instruments, provides comprehensive diagnostic information which can be cross-validated and used with other information to provide an individualized array of field learning experiences for the supervisory trainee, both in the first semester and throughout the training program.

Orientation also takes place in Phase I. It includes the identification of student strengths and weaknesses in the 27 critical competency areas identified as essential for Special Education supervisors. These competencies have been described as a "fairly complex array of on-the-job behaviors which produce, when manifested at a reasonably high quality level, a product or a service which would be highly valued by school officials under most educational conditions" (SEST Project, 1975). The field learning activities in Phase II are job related and are designed to

meet the needs assessed on the basis of the individual's professional background, experience, training, and identified strengths and weaknesses. They are, in addition, designed to provide a needed service to the educational institution providing the field opportunity for the student.

After the student's field learning needs are identified, the SEST faculty reviews potential field placements, using lists of special education facilities and personnel, and confers with field personnel to determine what each institution can offer a given student. The priority needs of the student are matched with experiences available at schools, agencies, and other community settings.

A student spends Phase II in one or two facilities. Most facilities provide opportunities in a number of competency areas, enabling a student to acquire several competencies in a given setting. The student is guided through each experience by field-based community personnel as well as by university SEST faculty, with conferences held among all three as needed. The philosophy of the model is to learn by doing, with guidance; therefore, conferences can be called by the student or one of his supervisors at any time throughout the training period.

In a field-based program, the importance of an appropriate match between student and placement cannot be overemphasized. It is essential not only for student learning, but also for developing and maintaining good relations between the program and the community. Open communication among all personnel is a necessity. Other modes of training have a place in higher education and should be interfaced with community resource field training. The field-faculty-student triad in the SEST program establishes the proper combinations of these modes.

Field Experience Reports

Field experience reports are completed by faculty supervisors and staff on forms that chart the trainee's competency attainment; they are then used to plan his next field experiences. The reporting forms are confidential, with one copy sent to the field supervisor, one filed and one kept by the student for reference in writing a summary report at the end of the year. It is important for the trainee to complete a form each week to avoid falling behind in this activity.

To avoid confusion, the following explanation was sent to the trainees so that they might understand the purpose of the forms and how best to complete them. A form and some sample responses are shown in Figure 6.

Directions for Completing Report Forms

A number of you have indicated some confusion about the correct usage of the FERF's. Attached are two sample forms for use as instructional models. Following is a description of each section to further aid in selecting appropriate information for inclusion.

Before proceeding, it might be helpful to review briefly the purposes of the forms. They are:

1. To communicate to the project faculty both the nature and extent of your field work activities. This will aid the faculty in: (1) assessing the degree of congruence between your competency needs and your actual experiences; (2) setting priorities among the activities in which you are engaged; and (3) making decisions relative to selecting future activities in which you might engage.

2. To provide data by which the project staff may assess the efficacy of the field work component as a worthwhile training endeavor.

3. To provide a learning exercise for you in maintaining records pursuant to self-assessment and evaluation. A great deal of research indicates that both teachers and administrators tend to lose track of the underlying rationale for engaging in particular organizational behaviors. A necessary prerequisite activity for engaging in any process is the identification and quantification (e.g. frequency of occurence) of the behavior in question. This applies equally to programmatic activities and personal behavior. Thus, the FERF activity is designed to assist you in developing and prioritizing the habit of self-monitoring.

4. To provide a record keeping system for later reference in summarizing teaching experiences.

Procedures

Sections 1 and 2 are self-explanatory and fairly clear. They should be used to describe the important contextual characteristics of the activity. It is possible that the same context will generate a variety of independent activities, in which case more than one form would be used.

Section 3 provides an opportunity to distill the salient learning opportunities afforded by the activity. Its purpose is to have you begin to think critically about the activity in terms of what benefit it had for you as a student. The limited amount of space provided indicates the necessity for parsimony and conciseness. Nevertheless, you will find that you will often have more things to write down than there is space provided. Use your own judgment in reporting these learnings. If important, use an additional sheet rather than running over into section 4. It is anticipated that with practice you will be able to get everything into the space provided, and this will aid you in learning to distill relevant characteristics.

Section 4 provides an opportunity to translate section 3 into positive action statements. These statements represent conclusions drawn from the learnings. A helpful rule of thumb would be to use the word "I" in constructing these statements. Again, parsimony is the goal; apply the above stated procedures here if you find yourself running short of space.

Section 5 represents an effort to have you summarize your response to the activity. These will reflect value judgments and emotional reactions to the activity in terms of purposes, procedures, etc.

Sections 6-8 are an attempt to assess the degree of your involvement in the activity. This will be most helpful to the faculty in helping you determine future activities and to the staff in terms of identifying the most worthwhile kinds of training experiences available in a field setting.

Sections 9 and 10 relate to a personal assessment by you of the value of the activity as a learning experience for other SEST students.

These two are fairly straightforward and should pose no difficulties in completion.

The other major area of ambiguity lies in determining the description numbers and the competency numbers to which the activity is related. As you know, the description numbers are taken from the Activities of Supervision list. You will have to be familiar with the list and the accompanying interpretive narrative in order to accomplish this task. By now, most of you have read through the narrative and this list several times; if you haven't, do so again. After several readings you will become familiar with the definitions and the task will become easier. As for the competency numbers, the same thing holds. You just have to be familiar with them. On both of these sections, there is considerable ambiguity in fitting particular activities into broad,general taxonomies. You need not let this become overly worrisome; just keep in mind the purposes and proceed.

This description is aimed at clarifying the task of filling out FERF's. If you continue to run into difficulties, I or any of the faculty and staff are available to help out in any way possible. Also, should any of you come up with improvement on the form or the procedures, let us share the benefit of your thinking. Good luck!

Figure 6

FIELD EXPERIENCE REPORTING FORM

Directions: Please write firmly so that all copies are clear. Use a separate form for each significant activity.

Name Shirley Starlett Date 5/13/74 Place Hollywood Elementary Time Involved 2:30 - 4:00 PM 1-1/2 hours

Description (Nos.) 1, 2, 8, 13, 22, 24 Competency (ies) A-4 B-1 B-3 E-3

Course work or study ___ Field ✓ Project Development ___ Special Activity ___ Other ___

1. Description
(Include materials used, if any, purpose, number of participants, kind of participants (teachers, supervisors.))

Helped supervisor plan, develop and present in-service on setting up "Learning Centers in a Classroom"
Thirty regular education teachers
In-service incorporated following characteristics:
a. Presented a model (i.e. room was set up in learning centers)
b. Entry level diag. of knowledge
c. Experiential component (trainer directed and self-directed)
d. Provided positive reinforcement for attainment of content objectives
e. Solicited trainee evaluation of program content and trainer
f. Created an environment which reinforced inter-teacher role and task sharing activities

2. Other explanatory comments

3. Specific Learnings
(include pre- & post-assessment, if any)

- Concrete reinforcers really excited the teachers, got their interest and held it
- Post workshop questionnaire indicated teachers appreciated the opportunity to "experience" the centers as "students"
- Teachers indicated the Pre- & Post-tests were too simple

4. Personal implications of above learning

- I will try to identify & use positive reinforcers when asking a teacher to learn something new
- I will try to design activities which get trainees involved in doing something & avoid lecturing

5. Evaluation - your response, reaction, feelings

I need more experience in planning such activities
The importance of being well organized (e.g. listing needed materials, stating objectives, organizing activities) become very clear to me
All the teachers (and I) agreed that this was a very productive experience

6. Your Planning

total planning resp.	planned part of act.	spontaneous planning	no planning resp.
	✓		

7. Involvement

other - leader	participant/leader	fellow participant	observer	no partic. at all
	✓			

8. Satisfaction

other	enjoyed & learned	enjoyed, no learn.	no enjoy., but learn.	no enjoy., no learn.
	✓			

9. Recommendations

should be done again, as is	✓
should be done again, with modification	
uncertain	
should not be done again	

10. Comments regarding recommendation

This was a very valuable experience for me. I am a little overwhelmed by the degree of planning & thorough preparation displayed by my supervisor. I need more practice doing the same kind of thing.

Figure 6 (cont'd)

FIELD EXPERIENCE REPORTING FORM (Sample form)

Directions: Please write firmly so that all copies are clear. Use a separate form for each significant activity.

Name Jet Star Date 9/1/74 Place Funnytown Elem. School Time Involved 2:30- 4:00 PM

Description (Nos.) 1,2,3,4, 24 Competency (ies) G-1 G-2

Course work or study ___ Field ✓ Project Development ___ Special Activity ___ Other ___

1. Description

(Include materials used, if any, purpose, number of participants, kind of participants (teachers, supervisors.))

P.T.A. advisory council meeting at Funnytown Elementary. Present included AISD field supervisors, principal resource teacher, psychologist, diagnostic teacher and 8 parents
·16mm film "Plan A in Texas"
·"Plan A in AISD & Implications for Funnytown"-principal (10 min)
·"The Resource Room"- resource teacher
·"Informal Diagnosis"- psychologist and diagnostic teacher

2. Other explanatory comments

Principal began by introducing everyone, showed the film, then got the presentation rolling. The psychologist used an overhead projector to provide visual images and had handouts available

3. Specific Learnings (include pre- & post-assessment, if any)

- No formal evaluation
- Multi media presentations (e.g. film, overhead projector, etc.) helps.
- Audience maintain attention
- Community is wary of the program regarding quality control, adequate attention, grading, etc.
- Lack of specific objectives and coordination among presenters resulted in confusion, redundancy

4. Personal implications of above learning

- I will always try to include an evaluation component to determine if these activities are effective & worthwhile
- When I design information presentations I will utilize various media
- When making community presentations, I will include efforts to reassure parents regarding quality control, etc.

5. Evaluation - your response, reaction, feelings

- Very informative to me - seemed to overload participants. They had trouble seeing the overall program
Need to provide an actualarial experience for parents in addition to just talking to them.

6. Your Planning

total planning resp.	planned part of act.	spontaneous planning	no planning resp.
	✓		

7. Involvement

other - leader	participant/leader	fellow participant	observer	no partic. at all
	✓	✓		

8. Satisfaction

other	enjoyed & learned	enjoyed, no learn.	no enjoy., but learn.	no enjoy., no learn.
	✓			

9. Recommendations

should be done again, as is	
should be done again, with modification	✓
uncertain	
should not be done again	

10. Comments regarding recommendation

Needs a little bit more planning (e.g. clear statements of purpose, etc.) and probably should be shortened

Figure 6

FIELD EXPERIENCE REPORTING FORM

Directions: Please write firmly so that all copies are clear. Use a separate form for each significant activity.

Name _____ Date _____ Place _____ Time Involved _____

Description (Nos.) ___ ___ ___ ___ Competency (ies) ___ ___ ___ ___

Course work or study ___ Field ___ Project Development ___ Special Activity ___ Other ___

1. Description (Include materials used, if any, purpose, number of participants, kind of participants (teachers, supervisors.))	3. Specific Learnings (include pre- & post-assessment, if any)	6. Your Planning	7. Involvement	8. Satisfaction
		total planning resp. planned part of act. spontaneous planning no planning resp.	other - leader participant/leader fellow participant observer no partic. at all	other enjoyed & learned enjoyed, no learn. no enjoy., but learn. no enjoy., no learn.
	4. Personal implications of above learning	9. Recommendations		
		should be done again, as is		
		should be done again, with modification		
		uncertain		
		should not be done again		
2. Other explanatory comments	5. Evaluation - your response, reaction, feelings	10. Comments regarding recommendation		

PROGRAM RELEVANCE AND USE

The three dimensions of the critical competency matrix are Problem Solving (I), Human Relations (II), and Developmental Tasks (III). Major competencies within the Problem Solving and Human Relations domains have been identified and form the core of the training program. The Task Development domain also has been defined in terms of major developmental competencies, and it serves to define the context for training experiences in each of the other two dimensions. Thus, a student might demonstrate his level of competency or increase his competency by developing inservice training or curriculum units (Development Tasks) utilizing the process of assessing, planning, implementing, and evaluating (Problem Solving), as well as the process of relating to staff and/or the community and public (Relating to People) as he accomplishes the assigned development tasks. The actual structure of each component of training for different students varies, for the different domains relate to one another in a variety of ways that can be individualized for each trainee. In general, however, the students are required to use problem solving and human relations skills in the process of accomplishing units of study which simulate in various ways and degrees some tasks typical of future role expectations in the field of special education supervisors.

There are many ways in which a person can achieve each major competency listed in each competency area. Therefore, major competencies are considered as examples rather than complete arrays of all possible major competencies that might be identified for a given area. This also is the case for the specific competencies under each major competency.

However, the major and specific competencies listed were developed through a lengthy process of discussion, observation, and assessment by staff and field practitioners, and they are considered important indications of each stated competency area.

The Developmental Task competencies were not differentiated into major or specific competency statements because of the endless variety of potential statements that could quickly result and partly because of the way the program is designed and conducted. That is, each training experience, unit, or module assigned to each student is defined or related in some way to these developmental tasks. It is the program's intent that each assignment will be different yet representative in some way of the six major developmental tasks.

ADAPTABILITY

It is assumed that to some extent the tasks for which a supervisor will be responsible will always be somewhat unique to the specific situation of work. It is conceivable that in the future additional developmental tasks will become incorporated into the Special Education supervisory role in a major way.

The program can remain current by experimenting continually with new ways of presenting training experiences, modifying them to reflect new aspects of total task roles as they become indentified as relevant to present or future practice. It is assumed, however, that though specific tasks will always be unique to a specific situation, the problem-solving and problem-relating skills will be generic, and these generic skills have been selected for emphasis in this program in terms of pro-

viding guidance for curriculum design and development. By substituting different tasks in Domain III of the matrix, the model could be made applicable to other supervisory roles in education and in various types of organizations outside of the field of education. Because it can be generalized, this program model can demonstrate a competency-based approach applicable to the education of supervisors in a number of fields.

INDIVIDUALIZED APPROACH

A variety of learning modalities are incorporated into the SEST training program plans. Field, class laboratory, independent study with instructional modules, media or readings, workshops and conferences, consultations with experts, individual and group project activities, and informal discussions and observation opportunities are all utilized as learning activities as far as possible.

Since most learning opportunities should be organized primarily from the critical competency framework, a number of activities might be utilized to train a student in a given critical competency. Selection of activities to teach a critical competency depends partially on the person being trained. For example, consider competency level F-1, Supervising with the Clinical Model. If a student has had a great deal of on-the-job experience in a supervisory or counseling role in which he has had the opportunity to counsel with teachers, he may not need lab or field training activities in face-to-face interchange with a teacher. However, he may need to learn about the systematic clinical framework for structuring this process. Thus, this student may require more class work and independent study activity than field work. Another student may have knowledge of the framework from past class or reading he has done but may

never have counseled a teacher face-to-face about her teaching. This student would be in need of a field experience. Therefore, the learning components utilized for the first student would be different from the second student, although both would be improving their capabilities for the same critical competency.

It is in selecting learning components and prescribing activities that the program can be most easily tailored to individual needs. The complete training program should consist of an array of clearly specified learning activity options for each critical competency. This specification of options, while varying in detail from year to year and even during a given year, is described in "assignment protocol" for each critical competency. These protocols can be used by trainees, advisors, instructors and field experience associates to give coordinated direction to the individual experiences of each trainee.

CONSIDERATIONS

In assessing the relevance and utility of the field component of a competency guided program such as this, there are a number of questions that should be asked. These questions were fully considered in designing and developing the training program model; they should be reconsidered by persons replicating the model at their own agencies or institutions.

1. Are the similarities and differences between professional education and academic education understood by the persons implementing the program?

2. What aspects of the program prepare the student for his role as a teacher/conceptualizer and problem-solver who must supervise others in a more technician-like role? The professional needs to be able to shift back and forth from a technician role (particularly as a demonstrator/teacher of these) to a conceptual/thinker role.

3. A professional needs to be a conceptualizer-doer for the set of special functions which define and delineate his profession. Are these functions clear and agreed upon?

4. How does the program insure that what is taught in terms of concept/skills, etc., is truly relevant to the professional goals? Are we being discriminating without being stultifying in terms of what is being taught?

5. Given answers to the previous questions, assessing unique contributions of field work in curriculum can be more easily accomplished. However, we must ask ourselves how field objectives relate to overall professional objectives.

6. Are we distinguishing between goals of change and means of change, particularly in the field component?

7. In terms of the entire curriculum and the fact that we cannot teach all knowledge, are we asking if the principle, concept or idea is necessary, relative to professional goals?

8. What should be particularly reinforced in the doing situation? Everything need not be translated into the doing context, even though it is relevant to professional goals and objectives?

9. How do we set priorities for testing the overall curriculum objectives in the field?

10. Have we clearly defined the "entry level professional" relative to the general professional goals?

11. In the field are we insuring the opportunity for the student to complete the entire problem-solving cycle -- assess and analyze the problem, arrive at a tentative decision, begin operation (implement), evaluate and recycle (if necessary).

12. In the field knowledge is applied and tested to get "real" feedback. How early in the curriculum should we introduce this feedback?

13. What learning principals are we adopting by the way we structure curriculum, and how do these relate to broader objectives? Do they support the broader objectives? Do they insure progress toward them?

14. In a profession a curriculum must be built around interlocking objectives. In the field the "doing" requires a synthesis of knowledge/attitudes/skills. Students must operate from a "gestalt" of knowledge; gut reactions and intuitiveness or bits and pieces of knowledge will not suffice. How do we structure in opportunities for helping the student with synthesis, (in a field context)?

15. There is usually a body of knowledge which is best taught in the field setting because it is relevant to that particular setting. How do we get the field person to teach this without becoming a classroom teacher? Or conversely, how do we provide for field supervisors who can spend some time in a teaching role while also carrying other professional responsibilities?

16. In the field a real-life problem generally has elements which the student does not have the knowledge to handle. Furthermore, even in one field situation students work on different cases, each having unique knowlege requirements. How can individualized tutoring around specific problems best be provided? (What is taught in class is not necessarily transferable to field and vice versa.)

17. The particular school/agency chosen for field work must be examined in terms of the balance of positive vs. negative learning that will probably take place. Are we keeping track of this balance? (Negative learning opportunities are those which are in opposition to the professional and curriculum objectives.) What negative learning is likely in a setting, and how much is tolerable?

18. How do we choose the field instructor model?

19. Since a university faculty can never totally control a field setting, how can we provide ways to assess the degree of risk in a setting? Some suggested steps include:

    Interviews with agency directors, field teachers
    Workshops for same
    Feedback from students -- 3 way interviews

20. Are we able to provide for extra time to devote to high risk placements?

21. Are we preparing faculty for the complex consultive role in field work?

22. Is this faculty-field liaison being prepared for some of the particular "hang-ups" of this linking role, prepared to offer real help rather than serve merely as a friendly visitor or a busybody?

23. Are we guarding against situations where student learning objectives may be compromised because of field needs? Agencies often want to use students for emergency, clean-up, or dead-end assignments. Although some of this might be tolerable, are we prepared to set limits?

24. Does field learning based on the relationship with the field teacher create too much dependency? (This would depend partly on field teacher-student "match".) If this begins to occur, what steps will we take?

25. How do we retain the values of an apprenticeship type of learning yet make field learning an integral part of the total educational program?

26. How do we distinguish goal of "development of level of competencies required for responsible entry into a profession" from "competencies required to do a job in a given setting or situation?"

27. How can we insure an equal opportunity for minimum basic field learning to all students in different settings?

28. How are assignments to students timed or introduced in field so that continuity, integration, and sequence are assured? Is this necessary?

29. How should school/personnel in the agency be involved with the total curriculum and particular field curriculum objectives? Should they help define them, agree with all of them, or even understand all of them?

30. What mechanisms should be created to faculty-agency field teacher and other agency staff communication regarding:

    Goals and objectives of learning
    Student progress
    Other

31. How do we get feedback from the field about student performance?

32. How much choice should the student have about his field assignment, and the agency about the student?

33. Are opportunities for peer group feedback available to students in field? Other?

34. How can we use unplanned, spontaneous and unusual, events in the field for student learning objectives?

35. Can we reconcile student trial and error or risk-taking elements with service requirements of setting?

36. What mechanisms are needed to remove a student from a setting when the situation-student relationship becomes detrimental to agency or student?

37. When a student is judged by himself or others, not suited to the profession after he has worked in the field, do we have face-saving ways to let him withdraw?

Another aspect to be aware of is learning backlash. This can occur when a person engaged in a new job situation or faced with a new set of problems, becomes frustrated by his inability to cope and seeks a scapegoat, a way of psychologically defending himself against the damage to his image. It can also occur when one learns to cope at a rapid rate and becomes

exhilerated by his new insights and satisfactions.

In either case, learning in this type of program takes place with a high degree of anxiety and many times in emergency conditions, often resulting in ambivalence about the high cost of that learning in terms of time, energy, and peace of mind. There is sometimes a feeling of guilt associated with the coping behavior, combined with feelings that the time and energy devoted to the problem might have been unnecessary or avoided and that there were other more important things to do.

Despite the success associated with learning, there can be a backlash when the student develops intense feelings of anxiety, guilt, and exhaustion. At this time he is liable to lash out at people and institutions whom he believes failed to prepare him adequately to meet the problem, as well as at those he feels caused the problem. Sometimes this lashing out is directed at subordinates and the community in general. More often, however, it is at the professional preparation program and the collegiate institution for their presumed failure to provide him with training appropriate to meet the realities of the world in which he must operate.

V

INSTRUCTIONAL RESOURCES

Three distinctive resources are used in addition to traditional resources such as texts, visiting lecturers, case materials and films in the program to contribute to competency development: the Independent Learning Laboratory, Computer Assisted Instruction programs, and the Computer-Based Competency Diagnosis System. Each serves trainees directly, facilitating growth in competencies on an individualized basis. They are also used by faculty and staff in guiding and assessing the learning process.

INDEPENDENT LEARNING LABORATORY

The Learning Lab was established to meet a twofold need: to provide students with an area in which to study, and to provide them with the equipment and materials that would enable them to pursue their course of study at their own pace. The materials are self-instructional, directly related to designated critical or basic competencies and coded and catalogued accordingly, and are self-contained, providing all resources necessary for a significant learning experience.

A series of 8 packets each dealing with one of 24 critical competencies has been developed. These packets were developed locally to meet the need for independent study material to supplement formal training and field experiences in a professional preparation program. These include:

The Delphi Technique for Curriculum Planning
A-1 Setting Instructional Goals (Document #10a)

Designing a Concept Development Unit
A-2 Designing Instructional Units (Document #10b)

Designing a Study of Available Resources
B-3 Evaluating the Utilization of Learning Resources (Document # 10c)

Developing Job Descriptions
C-1 Developing a Staffing Plan (Document #10e)

Material Selection
B-1 Evaluating and Selecting Learning Materials (Document #10d)

Preparing School News Releases for the Media
G-1 Informing the Public (Document #10h)

Selecting Personnel for a New School Program
C-2 Recruiting and Selecting Personnel (Document #10f)

Self-Instructional Module on Time Utilization
D-1 Revising Existing Structures (Document #10g)

The learning packets contain a variety of multimedia materials, ranging from slides and tapes to 16 mm. sound films. All accompanying materials are housed in the Learning Lab, where a special area is reserved for audiovisual use. A reservation system and a checkout system assure material availability. New materials are continuously being added to the Learning Lab. As new packets are identified from commercial or other sources, they are reviewed by students and staff, used and evaluated by students and faculty, and then either accepted, rejected, or reevaluated and revised for use. Materials are evaluated in terms of how well they apply to a competency area, the information presented, the need for prerequisite information before they can be used, and the value of the information presented relative to the time expended. Technical quality, interest, and relevance to the field of supervision are also considered.

Students are encouraged to design and develop learning packets. Experience has shown that many commercially produced materials require revision or further development and often are not as suitable for this program as are student-faculty produced materials. Critical competency A-2 in the model involves each student in developing a learning packet, thus providing the student with experience in instructional materials design as well as adding to the Learning Lab collection.

A Directory of Competency-Guided Supervisory Training Materials for Independent Study has been published in conjunction with the Project. This document contains a selected annotated listing of information, of items that have been purchased by the Project, of items that have been used but not purchased, and of items that were developed especially for the program. In addition, an in-depth, in-use evaluation has been made of the material by at least one SEST student and a staff member to determine its relevance to competencies, its relevance to course work and/or field experiences, the appropriateness of information presented, the necessity for prerequisite information before its use, and the value of the information presented relative to the time expended in its use. For ease of use, the Directory includes a title index, an author-publisher index, and a media format index.

The Directory is organized according to competency areas and facilitates a quick review of all items related to any given critical competency. Table 7 provides a brief overview of the number and type of materials currently available. Specific types of materials listed are illustrated in Figure 8. Users can review various items before selecting one for study, while faculty members can make suggestions and assignments from the information presented.

The data sheets on each item contain complete bibliographical information, including purchase price; the format of the material (e.g., book, filmstrip, videotape, etc.); time and equipment needed to complete the material; whether the material is intended for group or individual use; a description or abstract of the content; and where the materials can be found. Sample data forms are shown in Figure 9.

Table 7

COMPETENCY/MATERIAL INVENTORY RECORD - 1975

	Number and Type of Material									
Competency	Film	Game	Instrument	Kit	Manual	Programmed Material	Simulation	Study Packet	Tape	Total
A-1		1	1	3	1	3		5	4	18
A-2	2	1		3	2	9		1	10	28
A-3	1				1	2		2	1	7
B-1		1						2		3
B-2		1								1
B-3								2		2
C-1								1	1	2
C-2		1				1	1	1	1	5
C-3									1	1
D-1		1				2		1	3	7
D-2						2		2	2	6
D-3	5							2		7
E-1	1	1							2	4
E-2	1			2					1	4
E-3						1			1	2
E-4								2		2
F-1	3		7	6	2			2	2	22
F-2		1	1	5			1	5	3	16
F-3	1	1	1	3			1		1	8
F-4		2	1	1	1		1	1		7
F-5		1		2		1		1		5
G-1						2		1	3	6
G-2		1						2	1	4
G-3		1					1	1	1	4
TOTAL	14	14	11	25	7	23	5	34	38	171

Figure 7

MATERIAL DIRECTORY INFORMATION
(Sample Page)

INDIVIDUALIZING INSTRUCTION — A-2, A-3

Prentice-Hall, Inc.
Prentice-Hall Teacher Competency Development System
P.O.Box 132
West Nyack, New York 10994 — $7.95 per 12

programmed material — individual — 1 hour

The general goal of this program is to encourage educators to think more diversely about methods of providing instructional approaches. First, a distinction is drawn between individualizing objectives versus individualizing instructional procedures. Second, three school organizational patterns suitable for individualization, team teaching, nongraded programs and flexible scheduling are described along with specific instructional procedures suggested for each.

INFORMATION — A-2, B-2, F-4

Gail M. Fennessey, Erling O. Schild

Academic Games Associates, Inc.
430 East 33rd Street
Baltimore, Maryland 21218

game — 8 or more — 1-1 1/2 hours

The game is designed to create a healthy blend of competition and cooperation in small groups; its rules provide a carefully structured set of activities and scoring procedures so that players' success in answering questions about some particular topic can be encouraged and recorded. Information can be used to teach, drill or review any body of information.

INSTRUCTIONAL DESIGN: AFTER BEHAVIORAL OBJECTIVES WHAT? — A-2

William J. Moore

Educational Technology Publications
Englewood Cliffs, New Jersey 07632 — $4.50

cassette tape — any number of persons — 40 minutes

Much attention has been focused on instructional design based on behavioral objectives. Effective instructional design depends on characteristics of the effective teacher. This cassette discusses these effective characteristics necessary to carry behavioral objectives further.

Figure 8

MATERIAL DIRECTORY DATA FORMS
(Sample Forms)

COMPETANCY:

TITLE: Planning Worksheet for In-service Sessions: Instrument 6p-3

AUTHOR: Ben M. Harris

PUBLISHER: Instructional Leadership Training Materials, University of Texas at Austin, Austin, Texas

COST:

FORMAT: Planning sheet

LOCATION:
SEST files: ✓ (2.1)
SEST library: _____
Educational Administration library: _____
University of Texas library (specify): _____
SEIMC: _____ # _____
Other: ✓ Educational Administration storeroom

GROUP ACTIVITY: _____
Optimum number in group: _____
Needs leader? _____

INDIVIDUAL ACTIVITY: ✓

TIME NEEDED: varies

EQUIPMENT NEEDED: none

ABSTRACT OR DESCRIPTION:

Provides an outline for planning an inservice session in terms of general information about the group, anticipated outcomes, agenda, and materials and equipment needed for the activity.

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Figure 8 (cont'd)

COMPETENCY:

TITLE: Systematic and Objective Analysis of Instruction (Training Manual and Participant Materials)

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COST: $10--training manual
$7--participants materials

FORMAT: workshop plan

LOCATION:
SEST files: ✓ (1.2)
SEST library: ____
Educational Administration library: ____
University of Texas library ____
SEIMC: ____ # ____
Other: ____

GROUP ACTIVITY: ✓
Optimum number in group: at least 10
Needs leader? yes; expert in using materials

INDIVIDUAL ACTIVITY: ____

TIME NEEDED: 4 week series of workshops

EQUIPMENT NEEDED: laboratory school in operation

ABSTRACT OR DESCRIPTION:

Presents a workshop plan for teachers, administrators and supervisors to analyze classroom instruction. Essentially, the system uses a clinical supervision model of observation, analysis and treatment of problems. The workshop includes lectures, seminars and actual classroom paractice. The trainee also learns interpersonal communication skills and group processes.

COMPUTER ASSISTED INSTRUCTION

Computer Assisted Instruction programs formed another important learning resource for competency development. The specific use of the computer for the SEST Training Program was primarily within four functional areas:

1. Providing direct instruction
2. Storing and retrieving information of interest to students, faculty, department administrators, and graduate students
3. Providing specific analyses and profiles of student competencies
4. Matching student competencies to particular instructional or training resources

CAI has great potential for training programs in that it is individualized and it can offer unique simulated learning experiences related to specific competencies. To date, one major CAI program has been developed for the model, a decision-making module by E.W. Bessent (1974). It has been tested and is available for use. As other modules are developed to focus on specific competencies, they should provide greater diversity in learning opportunities that are adaptable to the wide range of needs for competency development.

The decision-making module emphasizes training professional leaders who can initiate change for improving instruction. The skill of decision making is central to the role of the instructional supervisor and is an essential part of each job task and process. To utilize the CAI program, a computer system with an APL compiler, telex terminals, and each student terminal with a film reel must be available. The total instructional time averages approximately 12 hours per student.

In actual practice this works as follows: Through one of several processes it can be determined that a student needs to work on a given competency. That requirement is entered into the computer, along with

the student's data base and the learning activities that are available to attain information and/or practice concerning that competency. The computer then provides a printout of a priority list of learning activities that would be most effective and efficient for that student, with his/her particular background, to attain a particular competency.

For the decision-making module, materials developed included Student Manual, Volume 1, and Problems Manual, Volume 2. These comprehensive documents were designed to familiarize trainees with rational decision-making skills that led to the improvement of their own decision.

MANAGEMENT INFORMATION SYSTEM

When the SEST Project began, the activities of the Special Education component of the Office of School Surveys included: (1) locating professors and students with specific competencies or who needed specific experiences, (2) defining learning experiences within projects requested by local education agencies, (3) matching people to projects through learning experiences needed and available, (4) maintaining the projects through their operational phases, and (5) evaluating project outcomes, At first this was handled with a traditional file system and good memory facility. However, as the Special Education component became more involved in the Project, the tasks of managing the needs of faculty, students, and Project became too cumbersome for traditional file cabinet operations. Recognizing the need for a more systematic management of the information, Project staff investigated and then initiated a computerized management information system which is in a developmental phase.

There were two sets of objectives for the Management Information System, one for Special Education Department purposes, the other for the

College of Education.

Objectives, Special Education Department:

1. To provide a means for keeping and using extensive records on student field experiences, courses, and individual program needs.
2. To facilitate implementation of planned sequencing of course and field activities for individual students, based on their needs and program demands.
3. To assist in evaluation of various personnel preparation components.
4. To provide a research tool for studying impact and various course/field experiences on pre-service training of personnel.
5. To provide a monitoring system for matching competencies with needed experiences.

Objectives, College of Education:

1. To provide experience with a computerized system for managing competency based preparation programs.
2. To develop a prototype system with the potential for generalizing to meet demands of other departments in the college.
3. To develop a computerized structure through which competency based programs could be input and retrieved across academic departments so students could/ would receive inter-disciplinary training as a matter of routine programming.
4. To provide means for evaluating the efficacy of specific competencies, courses, and experiences in terms of actual field-related functional abilities and needs.
5. To provide a research tool that would allow trial of numerous innovative programming efforts as the departments and the college move toward identifying exemplary models and approaches for preparing educational personnel.

The Systems 2000 NCR Model was used for storage, retrieval, and update of all records containing demographic data collected from approximately 250 graduate students enrolled in the Department of Special Education, plus students in the SEST Project and selected comparison groups from the Educational Administration Department. Biographic information, courses in which registered, graduate examination scores, and screening test and guidance scores were registered and updated throughout the year. Retrieval of these scores at periodic check points aided the faculty in tracking each student as he progressed through his program of study. In addition, demographic data collected from approximately 30 faculty members was coded and loaded for immediate access feedback. When projects from within the College of Education or from other sources arose, the computer could have paired faculty expertise with appropriate student need for precise study. Finally, longitudinal data collected from program graduates were to be loaded and stored for use on accountability.

For the SEST Project, all data considered significant by Project staff were stored in the computer. These data included biographical information, results of standardized and nonstandardized tests, Q-sort reports, material from personal interviews and faculty reactions, and information on each student's ability to perform specific competencies and improvement toward their attainment. To provide material for comparing SEST graduate students with students in different graduate programs in the Department of Educational Administration, data on other students registered in the department were added to the data base. In this way, new programs could be developed and tested for the diagnostic-prescriptive assignment of learning activities relative to specific competencies.

In actual practice this works as follows.

1. Diagnosis

The data stored in the system is programmed for retrieval and analysis utilizing critical, major, specific and basic competencies as defined by the SEST Project. Diagnostic routines were developed and tested for both instructor and trainee use in securing feedback on competency needs throughout the year.

2. Prescription

Through any one of several processes it could be determined that a student needs to work on a given competency; that requirement is entered into the computer, along with that student's data base and the learning activities that are available to attain information and/or practice concerning that competency. The computer would then have provided a printout concerning the prioritized listing of learning activities that would be most effective and efficient for that particular student with his/her particular background to attain any one particular competency.

3. Self-diagnosis

Another possible use of the computer terminal is the scheduled self-diagnostic activities in the area of computer-assisted instruction. There are a number of programs to assist students to develop decision-making capacities that are available for terminal use. When the terminal is not in use by staff or secretaries for data input or retrieval, the terminal could be available for students to use in this self-diagnostic activity to complete programs designed to teach instructional decision making. This could add up to somewhere between 50 and

100 hours of terminal time.

Clerical assistance is necessary for data input, for assisting in the analysis of data output, and for other associated activities that are concerned with the terminals.

A major attribute of the Management Information System was to enable students and faculty to use the computer to synthesize, analyze and profile student competency assessment data. The specific ability of the computer eliminated one of the major stumbling blocks to the implemenation of competency-based instruction. In such programs a great deal of assessment data is accumulated and frequently updated; the computer permits an analysis of that data which is essential for effective utilization in the development of appropriate training for the students. Although still in a developmental stage, the use of the computer with the SEST program creates expectations for significant contribution to training in the future.

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COMPETENCY ASSESSMENT SYSTEM

While the critical competency concept represents a major conceptual improvement in the performance-based instructional area, the utility of the concept and its acceptance depend in large part upon the development of valid assessment procedures. To assure the validity of the training model, program evaluation took place throughout the project. Training procedures and materials for use in teaching instructional leadership competencies were evaluated, revised, and re-selected; training materials and the associated instructional procedures were evaluated along with assessment of the achievement of trainees. A major undertaking was the development and evaluation of the Competency Assessment System, designed to provide decision-making information feedback. The continuous program assessment and refinement enables the model to serve as a guide for the development of the university training programs in special education.

ASSESSING TRAINEE PERFORMANCE

The assessment of competence poses an especially difficult and complex problem for the competency-guided training program. Ideally, a trainee's performance would be assessed through direct observation in real or simulated practice situations. Unfortunately, performance testing of this kind is often quite protracted and expensive. On the other hand, paper-and-pencil tests alone tend to measure performance at an unacceptably high level of inference in terms of predicting a successful transition to applied practice.

The system developed consists of an integrated set of instruments and procedures for assessing instructional supervisory competencies. Initial efforts to develop elaborate simulations for use in assessing were abandoned in early stages of the project for lack of feasibility in both on-campus and in-service settings. The overly simplistic use of tests of knowledge and ratings was rejected from the beginning for obvious reasons. What has emerged is a multivariate analysis process which relies heavily on self-assessments, but which also involves rigorous, systematic and logical use of several kinds of data.

The instruments and procedures constituting the assessment system provide estimates of competence for various aspects of performance. The assessment instruments are of different types, and multiple assessors are often used to collect judgement data from different sources. To aid in the assessment process, a fairly elaborate matrix analysis system, termed A Diagnostic Assessment System for Professional Supervisory Competencies, has been devised to synthesize and analyze the data generated by the various assessors using the assessment instruments. This system is discussed in detail in SEST Document #11, to which the interested reader is referred.

ASSESSMENT INSTRUMENTS

Four different assessment instruments are used to obtain estimates of the assessee's level of professional performance on each of the 24 critical competencies. A fifth instrument, an interest scale, is used to obtain the assessee's perceptions of the relative importance of each critical competency in his or her particular situation.

The five instruments are described briefly as follows:

1. Critical Competency Performance Inventory (CCPI). The CCPI contains

a set of twenty-four sheets describing the critical competencies in performance terms. Each sheet provides a statement of a competency, a rationale, and an illustrative example. The directions call for the assessor to sort these competencies into six categories that reflect the assessee's performance levels.
(Time: 30-45 minutes)

2. Major Competency Assessment Inventory (MCAI). The MCAI is an instrument used to assess performances on a set of eighty-one major competencies that have been identified as logical components or subdivisions of the complex behavior patterns comprised by the critical competencies. The individual major competency statements are contained on eighty-one cards that are sorted into six categories reflecting the assessee's performance levels. These performance estimates are recorded on a score sheet used to produce a performance designation for each critical competency.
(Time: 60-80 minutes)

3. Competency-Keyed Experience Inventory (CKEI). The CKEI consists of a checklist of 158 different activities related to the twenty-four critical competencies. The person being assessed uses the checklist to report his or her level of past experience with each activity. These activity scores are then combined on a score sheet to produce a performance designation for each critical competency.
(Time: 60-75 minutes)

4. Knowledge Assessment Test (KAT). The KAT is a multiple-choice, paper-and-pencil test of cognition, consisting of items keyed to the critical competencies. It provides two scores, one reflecting the assessee's level of knowledge in relation to each major competency, and a performance designation for each critical competency.
(Time: 80-90 minutes)

5. Critical Competency Interest Scale (CCIS). The CCIS is an interest scale for rank ordering the twenty-four critical competencies. The person being assessed reports his or her judgments as to the relative importance of each competency in planning his or her professional growth program.
(Time: 15-20 minutes)

A list of the 24 critical competencies on which all assessment procedures are based is given in Figure 9.

Figure 9

24 Critical Competencies for Professional Supervisors of Instruction

A. Developing Curriculum

A-1 Setting Instructional Goals

A-2 Designing Instructional Units

A-3 Developing and Adapting Curricula

B. Developing Learning Resources

B-1 Evaluating and Selecting Learning Materials

B-2 Producing Learning Materials

B-3 Evaluating the Utilization of Learning Resources

C. Staffing for Instruction

C-1 Developing a Staffing Plan

C-2 Recruiting and Selecting Personnel

C-3 Assigning Personnel

D. Organizing for Instruction

D-1 Revising Existing Structures

D-2 Assimilating Programs

D-3 Monitoring New Arrangements

E. Utilizing Supporting Services

E-1 Analyzing and Securing Services

E-2 Orienting and Utilizing Specialized Personnel

E-3 Scheduling Services

E-4 Evaluating the Utilization of Services

F. Providing In-Service Education

F-1 Supervising in a Clinical Model

F-2 Planning for Individual Growth

Figure 9 (continued)

F-3 Designing In-Service Training Sessions

F-4 Conducting In-Service Training Sessions

F-5 Training for Leadership Roles

G. Relating to Public

G-1 Informing the Public

G-2 Involving the Public

G-3 Utilizing Public Opinion

KNOWLEDGE ASSESSMENT TEST

The initial form of the Knowledge Assessment Test consisted of 243 multiple-choice items and yielded diagnostic assessment scores for the major competencies as well as the critical competencies. It was administered to several graduate students in the Department of Educational Administration, The University of Texas at Austin, as a pre-assessment instrument. It was later administered to most of the same students for post-assessment purposes.

An item analysis of student's responses was made. As a result of this analysis, 199 of the 243 items were either revised or eliminated. The New Form Knowledge Assessment Test (KAT-NF-1) contains 216 items, which yield scores for each of the 24 critical competencies, based on performance on 9 items for each critical competency. Separate scores for the major competencies are no longer available.

The New Form Knowledge Assessment Test was administered to two groups. of graduate students at UT-Austin, with a combined enrollment of 40. An item analysis of the responses of these 40 students is under way. It is contemplated that this analysis will result in another revision of the test.

ASSESSMENT SEQUENCE

The Diagnostic Assessment System has been designed for use at three points in a sequence of training: (1) pre-assessment prior to the initiation of training activities; (2) in-progress assessment at the mid-point of the training sequence, (3) post-assessment at the conclusion of the training sequence. The instrument instructions and analytical procedures vary somewhat at each of these assessment phases, but at each phase the system provides specific information needed to make diagnostic decisions regarding the trainee's status. In addition, all instruments and procedures are adaptable

to both in-service and preservice training sessions. (See Figure 10 for a flowchart of assessment events.)

The pre-assessment phase focuses mainly on the critical competency level in attempting to determine the integrated behavior patterns with which one enters a program. Measurement in this phase, as well as the terminal assessment phase, utilizes self-rating instruments, Q-sorts, rating forms by university and field supervisors, and various kinds of simulated activities. In-progress or monitoring assessment is directed to the major and specific competency levels and utilizes performance descriptions and simulated response data as well as testing procedures. Knowledge and behaviors that are exhibitable in class or laboratory settings, or through independent study or self-paced academic work, are measured here. Terminal assessment is compared to pre-assessment behaviors and also focuses on the critical competency level. The assessment of on-the-job behaviors is not for purposes of evaluating the quality of one's performance as a supervisor. Rather, it is to determine the behaviors in which a program graduate engages and the extent to which he or she was prepared in the program to assume the position. Measurement in this phase is limited primarily to self-report inventories, questionnaires, and interviews.

The actual procedures for conducting each assessment phase in its entirety are detailed in two users manuals, one for pre-assessment and the other for in-progress and post-assessment. Each manual contains detailed instructions for identifying the required instruments and assessors, completing the assessment instruments, and conducting the entire competency analysis. Program advisors and administrators need only assure that the correct number of instruments and the appropriate manuals and workbooks are available to each assessee.

USING ASSESSMENT OUTCOMES

This entire assessment system is essentially diagnostic, not prescriptive. The assessee dominates the whole assessment process. This is unavoidable but it is also desirable, given the underlying assumptions on which the system is based. The assessee's control of the process imposes limitations upon the uses to which the outcomes can be put, however. Similarly, the absence of any direct measures of the performance patterns specified in competency statements, further imposes limitations on the confidence with which the outcomes can be treated. These cautions and limitations not-withstanding, this assessment system, vigorously applied by appropriate individuals, can be useful in each of several ways:

1. The assessee can gain skill in using data from various sources in more systematic ways.
2. The assessee can be guided by the system to prioritize estimated competency needs in a logical, rational way.
3. The assessee can be guided to "cross-examine" self-perceptions of competence.
4. The assessee can be guided by the system to be selective in planning for further professional development.
5. The assessee can be assisted in accepting responsibility for continuous professional development.
6. The assessee can compare his/her competence levels with expectations of job situations.

COMPETENCE ASSESSMENT AND JOB EXPECTATIONS

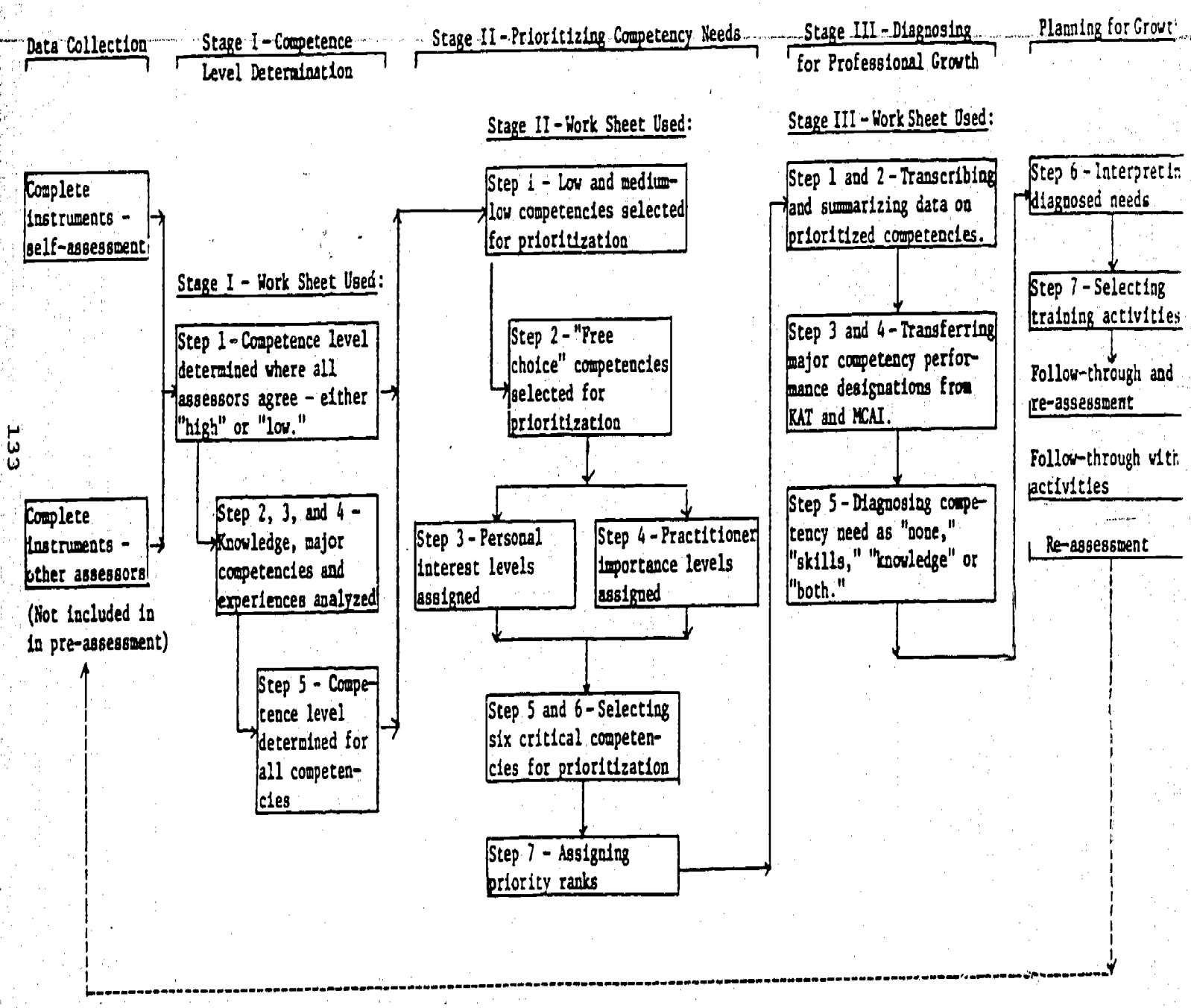
The diagnostic competency assessment sytem can be used for comparing competence estimates with job expectations. This involves considering both strengths and limitations as assessed. The post-assessment procedures are most useful for this purpose. If job expectations can be described as

an array of competencies, it is relatively easy to compare competence levels on the Stage I work sheet with competency expectations of the job under consideration. The data provided by the Critical Competency Interest Scale (CCIS) is also useful in making these comparisons.

Since competency assessment procedures have been developed and tested as a guidance system, its use in comparing jobs and individual job holders must be undertaken with caution. An assessee can compare his or her own assessment data with competency specifications for a job to assist in determining interest in seeking such a position with profit. An assessee staff group can analyze their various job/competency relationships to consider redefinition of assignments or needs for additions to the staff without concern. However, it might be unwise for assessees, placement officers, or employers to use competence levels as major selection criteria. To date there is too little information regarding the reliability and validity of these data to warrant their use for summative evaluation purposes, except with a great deal of caution regarding the meaning of the scores. In any case, many other evaluative criteria are needed in addition to those provided by this competency assessment system.

Figure 10

Flowchart of Events for Diagnostic Assessment



APPENDICES

ERIC

Appendix A

THE CRITICAL COMPETENCIES

With Statements of Rationale
and Illustrative Performances

ERIC

A-1 Setting Instructional Goals

Given a mandate to clarify major goals of instruction, the supervisor can lead groups of parents, citizens, specialized personnel, teachers, and pupils through a series of discussions, presentations, training sessions, and other experiences to produce a report showing some of the most important instructional goals on which there is agreement.

Rationale:

Goal setting is the necessary preliminary step to any kind of curriculum development. It is important in special education that program goals be understood and supported both in the school system and in the general community, and this understanding and support needs to be established during the early phases of curriculum planning. The supervisor should be responsible for facilitating the process of goal clarification among these constituencies.

Illustrative Performance:

The superintendent of the district explains to the special education division that he would like a statement of the major goals of instruction for the special education programs within the district. The director of special education asks the supervisor to select groups of community, school and pupil representatives, establish meeting schedules, set agendas, and conduct the sessions required to clarify instructional goals. The statement of goals is then made available to the superintendent.

A-2 Designing Instructional Units

The supervisor can design instructional units which specify performance objectives, instructional sequences, a variety of appropriate teaching/learning activities, materials, and evaluative procedures.

Rationale:

Though the supervisor is not the curriculum specialist within districts, she/he should have substantial knowledge regarding curriculum theory, purposes of curricula, specific formats that best contribute to desired outcomes, and other relevant aspects. By having the competency of being able to design a curricular unit, it can be assumed that she/he will be in a position to evaluate and revise existing curriculum, as well as to make significant contributions to the curricula that are available for classroom teachers.

Illustrative Performance:

A classroom teacher has an idea for what she considers to be an approach to math which would be more relevant to the exceptional children in her room. The teacher discusses the idea with the supervisor, who conducts a search and then informs the teacher that no existing design approaching the subject in her way can be located. The supervisor, together with the teacher, plans a sample unit. They prepare objectives, activities and evaluation processes. The teacher then uses the unit with her children and identifies areas that need revision or expansion. The revisions are made and the supervisor makes the unit available to other teachers in the district.

A-3 Developing and Adapting Curricula

Having secured innovative curricula developed outside the school or district, the supervisor can adapt the curricula to meet the needs of a student or student group, and make them available to local personnel for use in guiding instructional planning.

Rationale:

It would be impossible for a school district to originate all of its own curricula. Therefore, the supervisor must be prepared to adapt existing curricular designs for use with a particular student group. It is also important for supervisors to recognize that most material secured from outside sources will have to be adapted for teachers to use with their pupils, and the supervisor should facilitate the adaptation of the materials in his/her district.

Illustrative Performance:

The supervisor is asked to review a previously selected curriculum unit in order to prepare it for use with a student group, the characteristics of which are already known. The supervisor makes the modifications which are necessary in the design and makes it available to teachers for classroom use. After the initial use, a teacher requests that additional modifications be made, which the supervisor does, or which he assists the teacher in doing.

B-1 Evaluating and Selecting Learning Materials

Given expressed needs for learning materials, the supervisor can develop a set of evaluative criteria and procedures to determine the quality, utility, and availability of learning materials, and can organize and conduct review sessions where teachers and other personnel can apply the criteria to new materials and make recommendations for acquisitions in needed areas.

Rationale:

Since the provision of learning materials is an integral part of the implementation of a curricular unit, it is important that classroom personnel be able to evaluate material to determine its usefulness. In addition, materials already in use by a district can be improperly, inadequately, or inefficiently utilized. By having and applying consistent evaluative criteria to learning materials, it is possible for classroom teachers to increase the utilization of material already possessed and recommend the acquisition of materials that would be beneficial to them.

Illustrative Performance:

A publishing representative contacts a supervisor and requests an opportunity to display some recently developed material. There is an enthusiastic response on the teachers' part to see the material in hopes that it might fulfill some perceived needs. Prior to the session, the supervisor and the teachers identify and determine evaluative criteria to assess quality and utility of the material. On the day of the review, the teachers apply the criteria to the learning material and make recommendations to the supervisor. The supervisor then consolidates their input and makes a recommendation for the purchase of the most appropriate materials.

B-2 Producing Learning Materials

Given learning needs and a curricular design to meet those needs, the supervisor can arrange for the production of the necessary learning materials to complement, fulfill, and/or enhance the aims of the curriculum.

Rationale:

Learning materials constitute one kind of learning resource. They include various items used in the instructional process. It is often the case that the available learning materials are insufficient or inadequate for use in meeting the total set of learning objectives of a curriculum. It is the role of the supervisor to assist classroom personnel in designing, securing, producing, or adapting materials that will be most useful to complete the aims of a given curriculum. Assisting teachers in this area may include everything from instructing teachers in the use of ditto machines, up through the design and production of slide-tape sequences, programmed workbooks, or lab simulations.

Illustrative Performance:

A classroom teacher has identified a particular curriculum unit that she will use to present a social studies concept. She has available to her a teacher's guide explaining the methodology to be employed, student workbooks for each of her pupils, two transparencies, and instructions for conducting an experiment in the class. Feeling this to be inadequate, she seeks help from her supervisor. After reviewing the unit together, the decision is reached to produce three more transparencies, a programmed workbook, and a game based on the experiment. The task is completed, and the material is utilized in the classroom.

B-3 Evaluating the Utilization of Learning Resources

Given an array of learning resources currently available for use, the supervisor can design and conduct a study to determine the extent and appropriateness of their utilization, and, based on the results of that study, can make recommendations for the improved utilization of specific learning resources in specific ways.

Rationale:

Even though learning resources may be available for teacher/student use, the materials may not be widely used, may be used inappropriately with student groups, or may have other uses not known to the teachers. The supervisor should be prepared to devise guidelines which will indicate appropriate use, apply these guidelines to the material usage patterns, and recommend ways to improve the scope and appropriateness of the usage.

Illustrative Performance:

There has been some indication that certain materials which the district obtained during the previous school year have not been used as widely as expected. The supervisor is asked to devise an instrument that could be used to determine the amount of use and the appropriateness of the utilization. After designing the instrument and performing the evaluation, the supervisor finds that, in fact, the material has only been used a few times, and used appropriately on only one occasion. She recommends that an inservice session be presented in each building demonstrating the material, and that each supervisor take advantage of subsequent opportunities to explain to teachers how the material could be used in a variety of ways.

C-1 Developing a Staffing Plan

Given a new project proposal which specifies budget, general objectives, and operational procedures, the supervisor can describe essential staff positions to be filled, develop job descriptions for each, and specify the competencies required of the individuals who will fill the positions.

Rationale:

School districts frequently use pilot projects to field test the feasibility of educational innovations. Special education is a rapidly changing field; therefore, the supervisor will probably be involved in pilot projects and in creating and specifying the competencies needed for positions which are non-traditional. The supervisor, as the one closest to the field work, is in a good position to specify a staffing plan which would accomplish the objectives of the project.

Illustrative Performances:

The special education director asks the supervisor to specify the positions and competencies needed for staffing a pilot center for emotionally disturbed students. The supervisor gathers data from similar projects in other districts, consults with the state education agency about certification requirements and outlines the positions, qualifications, and competencies needed for the various positions that will be used in the project.

C-2 Recruiting and Selecting Personnel

Given a description of several staff positions to be filled, the supervisor, by engaging in a variety of selective recruitment activities, can secure a list of several possible applicants from various sources, can systematically secure and validate relevant information on the applicants by conducting personal interviews, by checking with previous employers, and by using other selection procedures, and can prepare a set of recommendations for filling the vacancies with the applicants who will best fulfill job requirements.

Rationale:

Any instructional program can be up-graded by the placement of well qualified, compatible new staff members. The supervisor is in a good position to determine the kind of person who would best work in a given instructional position. The supervisor, through various contacts, should be in a position to secure possible applicants in addition to the work done through the personnel division. After initial screening by personnel, the supervisor could check references, interview candidates, and make a recommendation as to who should receive the job.

Illustrative Performances:

The personnel director contacts the supervisor and informs her that efforts are underway to fill the two teaching positions requested by the Director of Special Education. The supervisor reviews and validates the information on the candidates, interviews the top nine, and, based on her knowledge of the vacancy, makes a recommendation to hire Mrs. Bubble.

C-3 Assigning Personnel

Given the task of assigning new personnel and reassigning currently employed personnel to achieve instructional improvements, the supervisor can analyze the needs, expectations, and composition of existing staff groups in various units, and, based on that analysis, can prepare and justify recommendations for assigning and reassigning staff members to positions for optimum educational opportunity.

Rationale:

At times current staff members must be reassigned and new staff employed to strengthen the educational program as a whole. The supervisor must be cognizant of the needs of the programs he/she supervises and should be actively involved in rearranging staffing patterns in order to enhance the special education program.

Illustrative Performances:

The special education components which the supervisor coordinates have several vacancies, and new teachers have been hired for them. The supervisor assesses the qualifications of the new staff members in light of the needs of various schools and recommends placements from which the teachers will receive and give the most benefit. She reviews the performance of current staff to assess whether the program could be more balanced by reassignment in some areas. Then she decides on an arrangement, moves some staff members and assigns the new ones.

D-1 Revising Existing Structures

Having determined the strengths and weaknesses of an existing organizational structure, the supervisor can propose carefully reasoned or research supported changes, which may include the alteration of assignments, of the use of staff time, of the required reporting patterns, or of the allocation of resources to improve efficiency, productivity, and morale, and, in so doing, improve the instructional process.

Rationale:

The structure of a school organization can at times impede its most efficient functioning. The supervisor should possess the techniques to identify and correct inefficient structures and the corollary skills to gain administrative support for instituting new, more efficient structural arrangements when the need exists.

Illustrative Performance:

The special education supervisor has noticed that the supervisory staff of a district spends its time in three major areas: instructional leadership, administration, and busy work. The supervisor proposes a reallocation of assignments which would create a division of these role responsibilities. Consequently three new staff positions are proposed: instructional supervisors, administrative supervisors, and supervisors' aides. The proposal also includes the procedures for hiring aides to perform such tasks as delivering materials to schools, filing pupil folders, etc., and the methods for differentiating the two new types of supervisory roles and reassigning present staff. These recommendations are discussed with appropriate individuals in the central administration and are adopted.

D-2 Assimilating Programs

Given a successful instructional program operating within a center, school, classroom, or other unit, the supervisor can design a plan for the smooth integration of the entire program or selected components thereof into a larger system, prepare a timetable and assignments for the transferring of responsibilities, and assure that the instructional improvement evidenced in the program is continued in the system to which it is transferred.

Rationale:

The benefits of a pilot program can be lost if the program cannot be enlarged to serve more children. The supervisor must have skill in identifying the aspects of special projects that merit assimilation, in preparing the path for the assimilation, and in assuring that important aspects of the program continue after the transition.

Illustrative Performance:

A district has been operating a pilot project for the severely retarded in a vacated school building. The students have demonstrated their ability to function in a school setting, and their parents are pleased with the program. The school board decides that the special project should be expanded and that the program should be established in several elementary schools. Funds are also provided for expansion of the classes. The supervisor meets with parent groups and elementary faculties to explain the assimilation process, arranges for equipment, makes staff transfers, hires new staff, screens students, and supervises the transition of the program.

D-3 Monitoring New Arrangements

Given the task of implementing a new organizational arrangement, the supervisor can determine reporting procedures, compare actual operations with planned developments, and when necessary, make recommendations to modify operations to bring them into agreement with formulated plans.

Rationale:

Educational innovations frequently require partial restructuring of existing organizations for their implementation. Change-oriented supervisors must be cognizant of and skilled in the procedures necessary for such transitions in order to manage such changes in units under his/her supervision.

Illustrative Performance:

The special education supervisor is asked to structure local support teams (LST's) in the elementary schools. These multi-disciplinary teams are to meet regularly for diagnosis and program planning for students having difficulty in school. The supervisor surveys the available personnel in each school, trains them in LST functioning, organizes initial meetings, establishes a reporting procedure, and monitors subsequent meetings intermittently. She periodically checks pupil progress to determine the appropriateness of LST recommendations.

E-1 Analyzing and Securing Services

Given a need for a supporting service, the supervisor can develop a list of sources from which to secure various services, and can describe situations and problems requiring supportive personnel.

Rationale:

One of the major roles of a special education supervisor is to assist teachers to meet the needs of special children. These needs vary greatly among the individuals in any given district. A supervisor should have information regarding the supporting services that are obtainable within a reasonable radius of a school or school district, should know about their availability, quality and cost, and should be able to make an accurate evaluation of all these aspects in selecting the particular source to render the needed service.

Illustrative Performance:

The special education supervisor is asked by a number of teachers within the district to provide a listing of local businesses or agencies which could provide career experiences for special education students. The supervisor investigates a number of places to determine whether they would participate in a "work-study" program for high school special education students. She then assesses the availability or quality of the field experiences each business would be able to offer and selects the two organizations which would provide the best experience. The teachers then make assignments for the students involved.

E-2 Orienting and Utilizing Specialized Personnel

Given a need for specialized assistance, the supervisor can secure the services of a variety of resource persons and can make arrangements for these persons to contribute their unique expertise to improve staff competence in specific areas.

Rationale:

When resource persons have been secured to provide special assistance on a problem or project, the expertise desired from the resource person needs to be clearly delineated. The resource person may have a variety of capability; some may be appropriate to the situation while others are not. Both the resource person and those with whom he/she will be working need to understand what is expected. Resource persons also need briefings on the situation and problem they will be involved with. Similarly, those receiving and working with the resource persons may need assistance in carefully planning when, where, and how to use them.

Illustrative Performance:

The services of a media specialist have been secured to assist a faculty group in learning to operate new videotaping equipment. The equipment was purchased on the basis of a plan to utilize videotape recordings in in-service programs. The supervisor recognizes the need for several kinds of training related to videotaping equipment. The supervisor meets with the media specialist to discuss training needs to see what his/her interests and capabilities are. They discuss possibilities and tentatively agree on a limited assignment for the specialist. The supervisor then formulates a tentative plan. This plan is discussed with teachers and other staff members who will be involved. The plans are reviewed, revised, and other specialists, if needed, are designated. The supervisor now resumes planning with the media specialist, provides information to him/her on the time, place, people, and conditions to expect. A plan of action is requested from the specialist in written form. If uncertainties develop, telephone calls or planning conferences are held. Instruments and procedures for evaluation are reviewed to be sure the specialist agrees to them.

E-3 Scheduling Services

Given diagnoses of pupils' needs and regular instructional personnel, the supervisor can propose a set of schedules to distribute services appropriately, to balance the loads of the staff members who provide the services, and to provide an opportunity for recipients of the services to maintain maximum involvement in their school programs.

Rationale:

Frequently the referrals of students for special education services outweigh the number of staff members available to provide the service. The supervisor, because of his central position, can coordinate the distribution of available services to provide for maximum impact and can help to make decisions regarding when services can be delayed without deleterious consequences.

Illustrative Performance:

The supervisor learns that 150 students have been referred for possible placement in classes for the emotionally disturbed, and only 64 can be accommodated without exceeding the appropriate teacher-pupil ratio. She reviews the student files to determine priority of need. She then makes arrangements for consultants, resource teachers, etc., to train the regular class teachers in behavior management techniques so that the students with less severe problems can be maintained in regular classes.

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E-4 Evaluating the Utilization of Services

Given a plan for providing better supporting services within a district, the supervisor can compare that plan with the current operation by utilizing objective data gathered in accordance with previously identified criteria and can propose recommendations that would increase the effectiveness and quality of the system.

Rationale:

Whenever staff personnel are engaged in administering or delivering similar services, there is sometimes overlap or duplication of effort in the services delivered by these persons. By reviewing the objective data available on staff members engaged in the process of delivering services, the supervisor can determine areas of overlap. Having done this, she/he can consolidate various services that are being delivered by two or more individuals. Such efficiency measures can increase the effectiveness of the services delivered and reduce the amount of time involved.

Illustrative Performance:

In the course of assessing staff needs, five special education supervisors determine that their teachers need training in some specific aspects of classroom management. Independently, they begin to plan inservice lessons on the same topic. One of the supervisors determines from weekly reports that they are all preparing similar sessions. After a discussion, one individual with specific training is requested to complete the inservice session, and the presentation is given once to all teachers. Each supervisor then assumes the responsibility for follow-up activities with her/his own teachers.

F-1 Supervising in a Clinical Mode

Given a teacher experiencing difficulties within a classroom, the supervisor can lead the teacher through a clinical cycle using classroom observation data, non-directive feedback techniques, and various planning and in-service experiences to produce significantly improved teacher behavior.

Rationale:

One of the supervisor's main responsibilities is to provide consultation to help teachers improve their instructional approaches and to stimulate them to utilize a greater variety of learning resources. Since classroom teachers often require, and time schedules often demand, individual supervision, one-to-one conferences are necessary. In these conferences, the use of the clinical model by the supervisor for guiding the change process facilitates and structures the supervisory conference.

Illustrative Performance:

The principal of one of the elementary schools has requested that the special education supervisor work with one of his teachers who is having difficulty integrating several special education students into the regular classroom. The teacher also feels a need for help with these children. The supervisor observes in the classroom utilizing the "Individualization of Instruction Inventory" and then provides feedback to the teacher in a conference. During the conference several strategies for increasing individualization in the classroom are jointly identified and the teacher plans to try out several of these. The supervisor observes again in the classroom as the strategies are being utilized. Subsequent conferences with more feedback, revised plans, and additional work enable the teacher to improve her performance.

F-2 Planning for Individual Growth

Given a teacher and data concerning various facets of his/her on-the-job performance, the supervisor can assist the teacher in establishing individual professional growth plans which include objectives for change in classroom practices, a schedule of experiences sequenced for continuous stimulation and growth, criteria specified for interim and terminal evaluation, and a specified period for accomplishing the objectives.

Rationale:

Each teacher being supervised is a professional person in education. Continuous learning and self-development are expected and essential in a rapidly changing profession such as teaching, where new methods, materials, theories and research findings are impacting the field continually. This professional growth orientation should be encouraged by administrative and supervisory personnel.

Illustrative Performance:

A supervisor in special education assisted a teacher under her supervision work out a personal professional development plan to increase his/her effectiveness and prepare for advanced career goals. The plan is individualized and includes a statement of short and long range goals and a description of professional development activities suggested for the coming year. The plan is accompanied by a rationale which spells out how suggested activities will contribute to short and long range goals. The teacher also indicates evaluation techniques to determine when his/her objectives have been completed.

F-3 Designing In-Service Training Sessions

Given a description of a specific staff group, including description of their needs for training, the supervisor can design or adapt a training session plan specifying objectives, activities, procedures, materials, and methods for evaluation to assure participant interest, involvement, and learning.

Rationale:

When the supervisor is aware of the specific training needs of a staff group, it may be appropriate to design a new training session or adapt one previously developed. Designs for training should clearly specify outcomes as improvements in practices. A logical sequence of activities for learning, along with appropriate materials, should be selected and developed. A variety of activities is important. Since actual practices are not likely to be influenced quickly, follow-up activities should be specified as part of the training design. Finally, both process and product evaluations should be planned to determine how desired outcomes occur in practice.

Illustrative Performance:

A group of regular classroom teachers at the upper elementary level have become aware that the resource teacher working with slow learning students and "behavior problems" seems to be getting results. At last the kids are working for the resource teacher. In discussions with the supervisor, it becomes apparent that the behavior modification techniques utilized by the resource teacher are working. Several teachers express an interest in knowing about and trying some of these techniques. Following intervisitation, a demonstration, some reading, and discussions, these teachers agree to a laboratory session in which they learn to withhold verbal praise, avoid negative verbalization, and give elaborate verbal reinforcement for clearly designated student performances. These objectives are spelled out in writing. A two and one-half hour laboratory session is outlined including a visualized review of principles, a brief demonstration, and role-playing. Scripts are written to get role-players started. Time is scheduled for sets of role-playing for each group so everyone plays three roles. At the end of the role-playing, plans call for a discussion for reacting to experiences. A follow-up plan calls for recordings in each teacher's classroom and a meeting with the supervisor to listen to results and suggest next steps. The last recording is analyzed to determine results.

F-4 Conducting In-Service Training Sessions

Given a description of a specific staff group, the supervisor can select an appropriate training plan, make arrangements, and lead participants through a sequence of meaningful learning activities.

Rationale:

When appropriate training plans are already available for meeting specific training needs, the supervisor should select from among those and proceed to make necessary arrangements. The supervisor, of course, must take precautions to assure "readiness" for the session activities. In leading a staff group through a sequence of pre-planned activities, the supervisor must be alert to help participants personalize their experiences. Interest and involvement must be maintained by efficiently pacing activities and offering opportunities for expressions of feelings and concerns. If the supervisor can project enthusiasm and make participants feel like full partners in the session, affective as well as other outcomes will be enhanced.

Illustrative Performance:

Teachers in the local high school have need for some help in conducting parent conferences as required at the end of each school year. The teachers report finding such conferences to be quite difficult because report cards must be reviewed during the conferences and many parents complain about the method of grading. Teachers tend to support the grading system, but have found it difficult to communicate with local parents. The supervisor selects a laboratory session developed and used previously in a communications workshop conducted by State University's Human Relations Center staff. The session calls for teachers to put themselves in the position of parents, listen to conference tapes, identify words that are technical or confusing, and then try to rephrase for better communicating. The supervisor organizes small teams to work on each tape recording. As they work, the supervisor circulates among the teams, offers suggestions, asks for clarification, and gives each team a chance to report its ideas. Toward the end of the session, the supervisor leads a brainstorming session to get a "pooling" of the terms causing communication problems. Everyone joins in the discussion of alternatives.

F-5 Training for Leadership Roles

Given individuals who have demonstrated both a high level of competence in a specific area and emergent leadership capabilities, the supervisor can train these people to conduct in-service sessions and to provide follow-up activities that result in the improvement of instructional skills.

Rationale:

Due to the numerous demands on supervisors' time, and because of abundant expertise among teachers in teaching concepts and skills to others, it is often both practical and efficient to have building teachers conduct workshops on specific areas in which they have expertise and enthusiasm. It is the responsibility of the supervisor to select teachers who are competent and skillful, to assist them to prepare for the task, and to provide them with feedback concerning the presentation after it has been concluded.

Illustrative Performance:

A unit of training on "The Philosophy and Goals of Plan A" has been developed with media, materials, group discussion topics, and a handbook of readings. The module has been found to greatly increase teachers' understanding and support of the plan. One teacher in each school who has been exposed to the module and who has been enthusiastic about its message has been identified, and they are trained to conduct this in-service session at their schools during the coming month. The sessions are held and the teachers who made the presentation are then available in the schools to provide continued assistance in the area.

G-1 Informing the Public

The supervisor can establish, promote and maintain favorable impressions of public school programs among community members by disseminating school information through the public media, by speaking to public and school groups, by conferring with parents and other interested individuals, and by meeting, as necessary, with community groups and leaders.

Rationale:

In a highly complex society such as ours, community members can be relatively unaware of the philosophy, activities, problems and accomplishments of an ongoing school program in special education unless some attempt is made to systematically inform them. Well planned information dissemination programs, utilizing the several media or other informal communications networks, can help to bridge this gap between the public and the institutions that serve the public. Such programs can also serve to recruit support for various operations.

Illustrative Performances:

A new method of teaching reading to dyslexic children is to be introduced in three schools in the district on an experimental basis. The new method requires that early screening of all kindergarten children in six geographical areas be accomplished during school registration. A public education program to alert parents and gain their cooperation in the early screening program is needed. A team of supervisors is assigned the task of planning and implementing the needed public education program. Through careful organization, cooperation and support are gained and the program is inaugurated with much success.

G-2 Involving the Public

The supervisor can plan ways in which parents and other interested individuals can become productively involved in and trained to assist at various levels of the special education program.

Rationale:

One way of gaining public understanding of special education programs and obtaining new input for the programs is to involve the public in the actual ongoing tasks of the schools. Such volunteer activities not only provide a needed service, but the commitment to improving services is often simultaneously reinforced. Volunteers often become effective community advocates for needed changes and improvements. A supervisor can arrange for and implement volunteer programs or assist teachers in doing so as a way of increasing community understanding of and support for school programs, as well as improving instruction by lowering the adult-pupil ratio.

Illustrative Performances:

In order to gain wider community commitment to Plan A, parents of children in "regular" education programs are asked to act as volunteers in a plan designed to provide special education children with a series of practice sessions in math and/or spelling. The parents will undergo training to prepare them for conducting the practice sessions. This project will be coordinated by a special education supervisor.

G-3 Utilizing Public Opinion

Given public opinion data regarding a special education matter, the supervisor can establish the urgency of the topic, determine the validity of the data, and, as appropriate, utilize the data in the decision-making process regarding initiation of new aspects, or the maintenance, revision, or discontinuation of current programs or practices.

Rationale:

Attitudes of the public toward school issues are often critical in determining the decisions of school leaders. Likewise, a program can become controversial or can be virtually "undone" if it is too discrepant with prevailing community sentiments. School personnel must be sensitive to these prevailing community attitudes so that the selection among alternative actions can be made in the light of probable consequences and community reactions to them.

Illustrative Performances:

A series of sex education films are being considered for use in a special education program. The films are shown to a random sample of parents and community leaders and their opinion regarding the appropriateness of the films is solicited. The supervisor, upon receiving the data and establishing its validity and urgency, seeks opinions from various school leaders, determines possible alternatives, gathers other relevant information, and finally makes a decision which is sent in the form of a recommendation to her superior for final action.

Appendix B

REPORT ON NATIONAL STUDY OF CRITICAL COMPETENCIES

Special Education Supervisor Training Project

ERIC

The following lists of competencies comprise the entire rank-ordering from the Gruber study:

A. Current practice among supervisors

1. Utilizing Time*
2. Acquiring Relevant Data*
3. Designing Budgetary Recommendations*
4. Utilizing Human Resources (E-2)
5. Selecting Personnel (now incorporated into competency (C-2), Recruiting and Selecting Personnel)
6. Specifying New Job Descriptions (now incorporated into competency (C-1), Developing a Staffing Plan)
7. Providing Information Programs to the Public (E-1)
8. Securing New Supporting Services (now incorporated into competency (E-1), Analyzing and Securing Services)
9. Scheduling Services (D-3)
10. Securing Learning Resources (non-material) (B-2)
11. Interviewing for Selection (now incorporated into competency (C-2), Recruiting and Selecting Personnel)
12. Assigning New Personnel (now incorporated into competency (C-3), Assigning Personnel)
13. Supervising with the Clinical Model (F-1)
14. Adapting Curricula (A-3)
15. Analyzing Services and Sources (now incorporated into competency (E-1), Analyzing and Securing Services)
16. Producing Learning Materials (B-1)
17. Training Leaders (F-5)
18. Writing Educational Plans (A-5)
19. Defining Roles*

20. Monitoring New Arrangements (D-1)

21. Revising Existing Structures (D-2)

22. Revising the Delivery System (now incorporated into competency (E-4), Evaluation of the Utilization of Services)

23. Planning for Professional Growth (F-2)

24. Utilizing Specialized Personnel (F-2)

25. Conducting Training Sessions (F-3)

26. Evaluating and Selecting Materials (B-4)

27. Designing Instructional Units (A-4)

28. Involving the Public (G-2)

29. Setting Instructional Goals (A-1)

30. Assimilating Programs (D-4)

31. Evaluating the Utilization of Resources (B-3)

32. Teaching Pupils*

33. Studying Public Opinion (now incorporated into competency (G-3), Utilizing Public Opinion)

34. Delivering Services*

35. Allocating Time to Function (C-4)

36. Developing a Resource File*

*Competencies not included in the current SEST list.

B. Competencies to be Included in an Ideal Training Program

1. Supervising with the Clinical Model (F-1)

2. Designing Budgetary Recommendations (selected from a group of competencies perceived as maintenance-oriented rather than contributing directly to change or to the improvement of instruction)*

3. Providing Information Programs to the Public (G-1)

4. Planning for Professional Growth (F-2)

5. Specifying New Job Descriptions (now incorporated into competency (C-1), Developing a Staffing Plan)

6. Utilizing Human Resources (E-2)

7. Acquiring Relevant Data (another competency [illegible]cted from maintenance-oriented behaviors- See number [illegible]re)*

8. Selecting Personnel (now incorporated into competency (C-2), Recruiting and Selecting Per[illegible]nnel)

9 & 10. Securing New Services and Analyzing Services and Services (the two have now been combined into one competency (E-1), Analyzing and Securing Services)

11. Revising the Delivery System (now incorporated into competency (E-2), Evaluation of the Utilization of Servi[illegible]es)

12. Training Leaders (F-5)

13. Monitoring New Arrangements [illegible]-1)

14. Utilizing Time*

15. Revising Existing Structures (D-2)

16. Assigning New Personnel (now incorporated into competency (C-3), Assigning Personnel)

17. Involving the Public (G-2)

18. Securing Learning Resources (non-material) (B-2)

19. Conducting Training Sessions (F-3)

20. Setting Instructional Goals (A-1)

21. Defining Roles*

22. Scheduling Services (D-3)

23. Designing Instructional Units (A-4)

24. Evaluating and Selecting Materials (B-4)

25. Writing Educational Plans (A-5)

26. Interviewing for Selection (now incorporated into competency (C-2), Recruiting and Selecting Personnel)

27. Adapting Curricula (A-3)

28. Utilizing Specialized Personnel (A-2)

29. Evaluating the Utilization of Resources (B-3)

30. Assimilating Programs (D-4)

31. Producing Learning Materials (B-1)

32. Teaching Pupils*

33. Studying Public Opinion (now incorporated into competency (G-3), Utilizing Public Opinion)

34. Allocating Time to Function (C-4)

35. Delivering Services*

36. Developing a Resource File*

*Competencies not included in current SEST list.

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Appendix C

LIST OF DOCUMENTS AND MATERIALS
DEVELOPED BY THE SEST PROJECT

SEST PROJECT

Available Publications and Materials

Technical Documents

Professional Supervisory Competencies, Document #7 (Revised), Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975.

A Selected Bibliography for Professional Supervisory Competencies, by Ben M. Harris and Corine Martinez, Document #8, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975.

A Directory of Competency-Guided Supervisory Training Materials for Independent Study, by Corine Martinez and Ben M. Harris, Document #9, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975.

Independent Study Training Materials for Professional Supervisory Competencies, Document #10, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975 (see next page).

A Diagnostic Assessment System for Professional Supervisory Competencies, by Michael C. Evans, Ben M. Harris, and Richard L. Palmer, Document #11, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975.

A Manual for Pre-Assessment, by Michael C. Evans, Richard L. Palmer, and Ben M. Harris, Document #12a, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975.

A Manual for In-Progress and Post-Assessment, by Michael C. Evans, Richard L. Palmer, and Ben M. Harris, Document #12b, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975.

Program Design Manual for Professional Supervisory Competencies, by John D. King in collaboration with Ben M. Harris, Document #13, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1975.

An Analysis of Training Experiences in the Special Education Supervisor Training Project 1973 - 1975, by Donald F. Enos in collaboration with Ben M. Harris, Document #14, Special Education Supervisor Training Project, Austin, Texas: The University of Texas, 1976.

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Competency-Keyed Training Materials

Critical Competency Number	Document Title & Reference
A-1	The Delphi Technique for Curriculum Planning, by Jane M. Duckett, Document #10a, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975
A-2	Designing a Concept Development Unit, by Darryl R. Townsend, Document #10b, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975
B-1	Material Selection, by Joan DeLuca, Document #10d, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975
B-3	Designing a Study of Available Resources, by Billie G. Herring, Document #10c, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975
C-1	Developing Job Descriptions, by Kenneth E. McIntyre, Document #10e, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975
C-2	Selecting Personnel for a New School Program, by Kenneth E. McIntyre, Document #10f, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975
D-1	Self-Instructional Module on Time Utilization, by Carol Giesecke, John D. King, and Patricia Miller, Document #10g, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975
G-1	Preparing School News Releases for the Media, by Stuart M. DeLuca, Document #10h, Special Education Supervisor Training Project, Austin, Texas: University of Texas, 1975

Consumable Assessment Materials

Critical Competency Performance Inventory (CCPI)

Major Competency Assessment Inventory (MCAI)

Competency-Keyed Experience Inventory (CKEI)

Knowledge Assessment Test (KAT)

Critical Competency Interest Scale (CCIS)

Workbook for Pre-Assessment

Workbook for In-Progress and Post-Assessment

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