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ABSTRACT

This annotated bibliography reviews 12 publications dealing with substitute teaching, including an article listing at least five ways principals can avoid problems with substitute teachers, a guidebook providing detailed advice for substitute teachers, an article suggesting community people with special knowledge be called in as an alternative to hiring a substitute, two articles on increasing the effectiveness of substitute teachers, and a description and analysis of a college sociology professor's experiences as a substitute teacher. Other articles give advice for devising strategies to make substitutes an effective part of the school's mission; report the results of a comprehensive survey of substitute programs in 1,728 school districts; describe examples of innovative programs that have proved to be successful in improving the quality of substitute teaching; describe a Houston program for training effective substitutes; give advice to regular teachers, department chairpersons, and administrators on what exactly a substitute can or cannot do and on the cooperation necessary to integrate substitutes into the regular classroom without disruption; and offer a checklist to evaluate a substitute teacher program. (DCS)

Number 79, February 1985

Substitute Teachers

1 **Booth, M. R.** "Get Your Money's Worth by Hiring Super Substitutes." *The Executive Educator*, 3, 8 (August 1981), pp. 34, 37. EJ 249 876.

What can a school manager do to find and keep good substitutes?

With as much as 5 percent of a school's faculty on any given day being substitute teachers and with their costs averaging between $30 and $80 per day, school executives can't afford to ignore the quality and experience of substitutes. Fortunately, the author of this article points out, there are at least five ways principals can avoid problems with substitute teachers.

First, a principal can keep a record of good substitutes, including information on the distances they live from school and their fields of training. Fellow principals might also recommend good substitutes—a service they would no doubt appreciate in return.

Interviewing a prospective substitute can also give clues to a teacher's flexibility, resourcefulness, and sense of humor. Posing hypothetical situations, Booth advises, will gain more information about a potential substitute than asking for their general attitudes.

Third, in preparing a substitute for work—a task that Booth stresses can be started in the interview—principals should cover the "dark" areas in their school's operating procedures, those areas that strangers would know nothing about—where to park, where to pick up lesson plans, where and when to sign in. "Nothing should be assumed" about what the substitute is familiar with. An orientation packet would show the substitute to the cafeteria and library and provide maps of fire escape routes, as well as explain school policies on attendance.

Next, a substitute "is crippled without three basics: lesson plans, an attendance roster, and seating charts." Classroom teachers can be required to file emergency lesson plans with department heads.

Finally, principals should ensure continuity in discipline by providing evaluation forms for substitutes on helpful and problem students. Rudeness or misbehavior to a substitute should be followed up with penalties equal to those for abuses of regular teachers.

2 **Cannon, Geneva.** *Survival Guide for Substitute Teachers*. Snow Hill, Maryland: Worcester County Board of Education, 1984. 17 pages. ED 242 661.

The author of this encouraging guidebook provides substitutes with detailed advice—ranged chronologically from preparing for class to afterclass tasks—with an emphasis on providing "a positive classroom climate for students to learn, to interact, and to have fun in the process." Cannon's emphasis on the practical details of classroom management might make this an excellent general handbook for substitutes.

Even if they are called in on short notice, it is vital that substitutes prepare for class by arriving early to review the classroom teacher's materials and ask questions about school rules or special students' needs. They should also be prepared to provide emergency lesson plans if none was left by the classroom teacher.

With a sense of being prepared, a substitute can perform diplomatically and purposefully: smiling, introducing himself or herself, and informing the class why the regular teacher is gone and when he or she will return. Perhaps the most important piece of advice Cannon offers is that, beginning as soon as class starts, the substitute should convey the impression that something important is happening in the classroom.

Then, of course, the substitute must follow up the sense of importance with a clear direction in the lessons and activities of the day. Students need to be told *how* as well as *what* to do and *why*: directives should inform students of a lesson's objectives, the way it should be done, and what to do after they finish. Cannon suggests that the substitute circulate among students as they work, giving guidance and answering questions. Summarizing the day's activities for the regular classroom teacher enables the latter to integrate that day with the regular class program.

Above all, Cannon makes clear to substitutes that they, too, are important parts of a school program.

3 **Deutchman, Sandra E.** "Why Settle for a Substitute?" *The Clearing House*, 56, 9 (May 1983), pp. 397-98. EJ 280 867.

When a classroom teacher is absent, it could be a unique opportunity instead of a problem. Instead of hiring a substitute, a principal can call in a *guest teacher*. An intriguing alternative to a substitute program, a guest teacher arrangement uses community people with special knowledge in various areas, people who will engage the special needs and interests of the students.

To begin organizing such a program, each classroom teacher would make out a request list, describing the specific knowledge, skills, and approaches that would enhance the course objectives. After the list is approved by the faculty committee and submitted to the administration for approval, guest teachers can be invited to apply to the new program. Each district might invent its own criteria and format for the applications, which can range from projected lesson plans to videotaped examples of applicants'

teaching. Students can also review the applicants and express their preferences. A computer might be used to store the information so it is ready for review and selection when a classroom teacher must be absent.

When the flu bug strikes, a guest teacher is on call. Students expect to hear something new and pertinent from the guest — and to see someone that they may even have had a hand in choosing.

Besides being a refreshing alternative to substitutes, guest teachers could suggest new content, methods, and resources to introduce into the regular curriculum. Guest teaching might just turn the uncertainty of calling on substitutes into the enrichment of using knowledgeable practitioners.

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4 **Drake, Jackson M.** "Making Effective Use of the Substitute Teacher: An Administrative Opportunity." *NASSP Bulletin*, 65, 446 (September 1981), pp. 74-80. EJ 249 892.

"A substitute teacher is often thought of as the 'spare tire' of American education," quips Drake—that is, as an emergency resource that is forgotten as soon as the emergency is over. Instead of confining the problem to substitutes, though, Drake lays it at the school door. Substitutes can be made more effective teachers, he says, with better administrative planning. In particular, recruitment, selection, inservice training, and evaluation need to be improved at most schools. His suggestions, as the following examples reflect, clearly point to the role of the administrator:

Various means of recruiting good substitutes might include involving parents, colleges, and regular or retired teachers in the search.

In screening a cadre of substitutes, a principal should always select those who can teach—can adapt to various sorts of classrooms, achieve rapport with students, demonstrate knowledge of a subject field, and weather a rough teaching assignment with humor.

Besides providing an inservice orientation, an administrator might remember to assign substitutes only to departments in which they have certification and expertise.

Specific standards could also be set for substitutes in teaching, management techniques, professional attributes, and personal characteristics — general standards that can guide a substitute's selection, orientation, and evaluation.

In sum, says Drake, administrators should dispel their apathy about substitutes and begin to recognize their real value.

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5 **Friedman, Norman L.** "High School Substituting: Task Demands and Adaptations in Educational Work." *Urban Education*, 18, 1 (April 1983), pp. 114-26. EJ 282 266.

What happens when a college sociology professor becomes a substitute teacher in public schools? Friedman tells what it was like to be that professor. Besides learning how to do the job of a substitute, he also learned how to analyze the role.

He substituted for 45 school days over a ten-month period, spending 39 days in senior high schools, 4 at junior highs, and 2 at elementary schools. As a "typical" substitute (he did not reveal his occupation or advanced degree to students or other teachers), Friedman observed recruitment and orientation procedures and daily routines.

He found that he was expected to adapt to two major demand areas — "order-maintenance" and "assignment-execution."

The task of maintaining order in the classroom, he found, demands the same skills of substitutes as of regular teachers, though the demands are intensified by the substitute's temporary status. But substitutes also have special order-maintenance problems. In describing the "phenomenon of the false friend," for instance, Friedman relates how apparently friendly students will warn a substitute about a class's discipline problems, only to become the biggest discipline problem themselves.

He had to resort to a kind of theatricality in "assignment-execution," in which he was often required to fill in class time with impromptu content because the regular teacher's lesson plans were too short or too vague. When teachers left independent work for students, the substitute was relieved of the need to improvise and could help students.

Friedman observes that substituting bears more study not only because it is important in itself but because "it is an extreme, stripped-down, speeded-up form of teaching" that can provide insights into all teaching situations.

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6 **Frosch, Carol Snow.** "Thoughts on the Proper Utilization of the Substitute Teacher." *NASSP Bulletin*, 68, 468 (January 1984), pp. 89-91. EJ 291 495.

There are two common views on the question of substitutes' effectiveness: either the substitute teacher needs to be oriented to the school, or the regular classroom teacher needs to be trained to provide for the substitute's needs. Although each view has its merits, the unique needs of each school will probably call for combining both approaches. In fact, each school has very different expectations of its substitutes. Some schools are concerned mainly that substitutes control students, others that they maintain some educational continuity.

Whatever the concern, a strategy can be devised for making substitutes an effective part of the school's mission. Orientation sessions, for instance, can be as varied as a school requires or a substitute needs. They may be as thorough as a short course on classroom management or as brief as a summary of necessary information about school procedures.

Cooperation and coordination among school staff can also aid in meeting the school's needs. But administrators will probably have to delegate responsibilities in order to ensure everyone's cooperation. Making sure that teachers leave lesson plans and seating charts with substitutes, for instance, may be necessary to make the most of substitute teachers' services. Assigning a nearby teacher or administrator to respond immediately to a substitute's plea for help can avoid future problems.

In general, flexibility and administrative planning are the keys to guaranteeing that schools and substitutes mesh.

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7 **Koelling, Charles H.** "Substitute Teachers — School Policies and Procedures in the North Central Region." *Education*, 104, 2 (Winter, 1983), pp. 155-71. EJ 297 140.

Most school districts do not now have a systematic or effective substitute teacher program, concludes Koelling, who conducted a comprehensive survey of substitute programs in 1,728 school districts. Koelling's questionnaire covered administrative arrangements in substitute programs, the schools' determination of substitutes' qualifications, and operational issues in running substitute programs. The large sample ranged from small districts having less than one thousand students to large districts of over ten thousand. Koelling's data highlight areas of strength and weakness in substitute programs.

There was unanimity in the low pay and uncertain status afforded substitutes, Koelling found. In most districts, the employment of substitutes was not by contract but day to day. Few districts (6.7 percent) give fringe benefits to substitutes, but in every size category, districts give regular teacher's pay to substitutes working a minimum number of days per year. The majority of districts in each category also pay between $30 and $40 per day for their substitutes.

The training required for substitutes, a second topic of Koelling's research, was perhaps the weakest area. Although certification was a minimum requirement in 77 percent of the districts, over 70 percent required no minimum professional training nor any special training in the field in which the substitutes were assigned to teach. Most surprisingly, over 97 percent required no previous teaching experience for substitutes.

Similar to the apathy about teacher training for substitutes, Koelling also found that nearly three-fourths of the districts had no formal programs for either orientation or evaluation. An average of only 35 percent of all districts had developed handbooks for substitute-teacher orientation.

With the inadequacies of programs so evident, Koelling suggests a new emphasis on the importance of substitutes and an exploration of the costs and benefits of alternative arrangements.

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8 **Kraft, Daniel W.** "New Approaches to the Substitute Teacher Problem." *NASSP Bulletin*, 64, 437 (September 1980), pp. 79-86. EJ 230 144.

Kraft has assembled examples of innovative programs that have proved to be successful in improving the quality of substitute teaching. These new programs in orientation and evaluation testify again that schools can improve substitute teaching with flexible and creative policies.

Ewing Township, New Jersey, for instance, offers a ten-week course in substitute teaching as part of its evening adult-education program. A six-week program in Wilmington, Delaware, public schools covers school objectives and introduces substitutes to administration, guidance, and health staffs. "Many school systems hold annual seminars," Kraft points out, "to explain new educational innovations to substitutes. Substitutes may also attend faculty meetings, staff inservice programs, and parent-teacher association functions."

School districts in New York, Los Angeles, Seattle, and elsewhere give substitutes extra time to prepare by means of a twenty-four-hour recorded answering service, which permits teachers to report their absences early. In Detroit, a computer locates substitutes quickly and decides whether a specifically requested substitute is available.

In some schools, evaluation forms are available to substitutes, who can rate the help they received from teachers and administrators. Such forms have been used in Grosse Pointe, Michigan, and Medford, Massachusetts.

Above all, though, substitutes will never function effectively until they are considered professionals and as valuable parts of school faculties. Renaming substitutes, as some schools have done, as "reserve" or "guest" teachers or providing them with student "hosts" to answer their questions can raise student attitudes and also improve the substitute's quality of teaching.

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9 **McIntire, Ronald G., and Hughes, Larry W.** "Houston Program Trains Effective Substitutes." *Phi Delta Kappan*, 63, 10 (June 1982), p. 702. EJ 264 279.

With few substitutes having adequate professional teacher-training, how can principals ensure that their substitutes have the skills to manage a classroom and meet the school's educational goals?

A practical program sponsored by the University of Houston, Texas Southern University, and the Houston Independent School District addresses the special demands that confront substitute teachers. The Substitute Teacher Education Modules (STEMs) are twenty two-hour inservice training classes that seek to improve the effectiveness and working conditions of substitutes. The problems addressed in the STEMs were suggested by substitute teachers and verified by regular teachers and building principals. Each STEM focuses on a simple vital skill.

In developing the list of skills, the compilers discovered that many of the skills of substitute teachers differ from those of regular teachers. For example, substitutes do not know the students they work with, so they must vary their presentations and rely on behavior management techniques. Thus, some modules teach substitutes positive reinforcement techniques to encourage students' appropriate behaviors.

Other STEMs teach program participants essential teaching skills: to set tasks at appropriate levels of difficulty, to supply prompts, and to divide long assignments into shorter, more readily accomplished tasks. Modules also emphasize communication skills, the mechanics of filling out school forms, understanding school district policies and school laws, and using state-adopted texts and materials. One particularly useful program deals with lesson planning on short notice.

Results show the program has improved the quality of instruction and provided schools with dependable pools of knowledgeable substitutes.

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10 **Rawson, D.V.** "Increasing the Effectiveness of Substitute Teachers." *NASSP Bulletin*, 65, 446 (September 1981), pp. 81-4. EJ 249 893.

Some of the problems associated with substitute teachers may grow from the low priority given to them in the school system. Their pay scales do not reflect their differing amounts of experience nor the benefits offered regular teachers. Their role expectations are widely scattered: administrators wanting order in the classroom, classroom teachers wanting continuity with their programs, and substitutes wanting to meet both sets of expectations while being all too aware of their low status in the system. In short, their distance from the normal activities of a school can create problems. For instance, how a substitute deals with the students'

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separation anxiety from their regular teacher can determine whether students treat the substitute as weak or as an extension of the school's purpose and authority.

Solving these problems of status and perception is really not so elusive as it may seem. Solutions lie in bringing the substitute closer to the regular school environment, clarifying the vague expectations, and introducing formal feedback procedures. Perhaps a faculty liaison, appointed by the principal, can facilitate communication between the substitute and the regular faculty. A short inservice might be devoted to reducing the faculty's suspicion of substitutes and to clarifying roles and procedures. Finally, instead of relying on administrative evaluations alone, evaluation and feedback could involve regular teachers, who can also initiate evaluations.

Analyzing the problem carefully and involving the whole faculty in cooperative solutions may be the best courses of action in solving the substitute dilemma.

11 **Rundall, Richard A.** "Give Your Sub a Break." *The Clearing House*, 55, 1 (September 1981), pp. 43-44. EJ 250 775.

The key to integrating substitutes into the regular classroom without disruption is knowing what substitutes can and cannot do. These indispensable *Do's* and *Don't's* are addressed to three groups who are responsible for preparing substitutes. It takes their truly cooperative effort to integrate substitutes into a school's program.

First, *regular teachers* should remember that the substitute doesn't know the students. Assignments should be crowd-pleasers and should fill the allotted time. Films or videos are the best assignments. Reading assignments, active lessons, and combining classes with another teacher all keep students occupied. Substitutes should be spared having to administer tests, do demonstrations they may be unfamiliar with, or give worksheets that the students can do quickly.

Department chairpersons, too, can help with advance preparation as well as with personal contact with the substitutes. Budgeting time during departmental meetings to discuss faculty absence procedures will pay dividends in a smoother operation later. Chairpersons can also greet substitutes in the absent teacher's classroom, helping them find lesson plans and seating charts. They can stop by during the day to help with problems or take the substitute to lunch.

Besides orchestrating everyone's cooperation, *administrators* can also provide the general information so needed by substitutes—bell schedules, referral slips, special events scheduled for the day. Such "small" considerations figure large for a substitute. Administrators can make sure that substitutes don't have to wait in the office at the end of the day to turn in time slips, for instance, or leave not knowing if they are needed the following day.

The responsibility for integrating the substitute's work with the regular teacher's is not limited to one person. With a cooperative effort, the substitute's service can be stronger and more effective.

12 **Sendor, Elizabeth.** "Use This Test to Spruce Up Your Substitute Teacher Program." *The Executive Educator*, 4, 6 (June 1982), pp. 16-17. EJ 263 083.

The quiz format makes this article an enjoyable way to evaluate your substitute teacher program. Each item describes a positive attribute of substitute programs. You respond with how frequently your program matches the description. A second section explains the questions' importance and why certain characteristics are desirable in substitute programs.

The questions, both practical and theoretical, summarize the issues and the advice most often given about substitute teacher programs, as these examples demonstrate:

Does your school or district interview prospective substitutes? Are the questions appropriate to the tasks a substitute faces?

Do you provide substitutes with packets of information about your school's procedures, schedules, and policies?

Do you keep a list of effective substitutes? Does the list include substitutes qualified to teach in each subject area? Does it note who lives within a ten-minute drive of school?

Have your regular teachers filed several days' worth of "universal" lesson plans, suitable for emergencies? When regular teachers are absent, do they leave vital classroom information for the substitute—seating charts, attendance forms, or notes on individual students? Does the principal or a regular teacher drop in on the substitute's class to offer support?

Are there evaluations at the end of the day? Does the substitute evaluate the class? Does the class evaluate the substitute? Are students punished if they cause trouble for a substitute?

Perhaps most importantly, do substitutes enjoy working at the school?

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