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An Assessment of the Problems of Recruiting and Retaining Substitute Teachers for the Elementary Schools of the Jackson Public Schools, Jackson, Michigan

William Henry Sumner
Western Michigan University

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AN ASSESSMENT OF THE PROBLEMS
OF RECRUITING AND RETAINING SUBSTITUTE TEACHERS
FOR THE ELEMENTARY SCHOOLS OF THE JACKSON
PUBLIC SCHOOLS, JACKSON, MICHIGAN

by

William H. Sumner

A project report submitted to the
Faculty of the School of Graduate
Studies in partial fulfillment
of the Degree of
Specialist in Education

Western Michigan University
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June 1969
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William Henry Sumner
MASTER'S THESIS  

SUMNER, William Henry  
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XXV. Instructional Tasks Which Some Classroom Teachers Avoided Assigning to Substitute Teachers

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CHAPTER I

THE PROBLEM AND ITS BACKGROUND

On those days when absenteeism was high among elementary classroom teachers, the Jackson Public Schools of Jackson, Michigan, had difficulty staffing all of their classrooms with qualified substitute teachers. Last year, on one or more occasions, five elementary schools sent some of their students home because qualified substitute teachers could not be found. On several occasions in the two elementary schools in which this writer is principal, substitute teachers, whose professional competence was doubtful, were placed in classrooms. This study was designed to assess the problems of recruiting, retaining, and educating qualified substitute teachers for the elementary schools of this school district.

The Problem

Statement of the problem. The primary purpose of this study was to acquire information from those directly or indirectly involved with elementary substitute teaching that would enable the Jackson Public Schools to increase their supply of substitute teachers, to meet whatever demands were placed upon them throughout the 1967-68 school year.

Other purposes of the study were to: (1) study the
feasibility of instituting orientation and inservice workshops for substitute teachers in order to increase their professional competence, and (2) seek ways of inducing more substitute teachers to work in schools with large numbers of "culturally disadvantaged" children.

Selection of the problem. The selection of this problem grew out of an awareness that this school district did not have enough substitute teachers to maintain all of its elementary classrooms for all times of the school year. Whenever the demand for substitute teachers became acute, makeshift methods of educating children were employed: children were divided among other teachers, subsequently creating overloaded classrooms; principals took over classes, thereby neglecting their administrative duties; and teachers' aides were temporarily assigned the position of substitute teacher, an assignment of doubtful legality, to say nothing of questionable practice.

Widespread illness and increased attendance at educational conferences on the part of regular teachers depleted the substitute teacher supply on occasion. Administrators, therefore, had to resort to the aforementioned expediencies for filling classrooms with substitute teachers. Moreover, whenever either of these conditions occurred, the school system became anxious about the extent of substitute teacher shortage which the school district might have to withstand. The lack of an adequate substitute teaching
force was an important factor that influenced administrators to limit regular teacher participation in professional growth activities during 1967-68; the administration could not be sure that enough substitute teachers could be found.

A survey of current literature about recruiting, retaining, and educating substitute teachers revealed considerable information about the magnitude of the problems involved in providing substitute teachers for elementary classrooms throughout the country. The literature revealed that our school district is not alone in its search for answers to these problems.

**Importance of the study.** It was not difficult to justify the need for substitute teachers in the Jackson schools. Without them the educational program would have been adversely affected in those classrooms without regular classroom teachers. In order for our schools to provide quality education for children, it is important to periodically upgrade all phases of the educational program. This researcher believes that sufficient empirical evidence exists within this school system to warrant a study of this kind. Here, specifically, are bases for support of this opinion.

1. **Children must be provided ongoing, daily programs of education.** This education must be given by qualified adults. In most instances, these adults must be either professional classroom teachers or their qualified substitutes.
2. Palliative measures implemented by administrators, to provide classrooms with direction when no substitute teacher can be found are, at best, poor design for a satisfactory educational program.

3. Parents become skeptical of the worth of elementary education when their children bring home unfavorable reports about the experiences that they have at school when: (a) no substitute teachers can be employed or, (b) poor substitute teachers are employed.

4. Administrators are reluctant to grant released time to classroom teachers for participation in professional growth activities when they cannot be assured that their classrooms will be filled with qualified teachers.

Review of the Literature

With more teaching and administrative personnel needed for schools, it is not difficult for the reader to perceive that more substitute teachers are needed too. As far back as 1961, one study of the substitute teacher situation revealed that the number of substitute teachers employed each year had grown even greater than pupil enrollments.¹ The demand for substitute teachers has increased for two

basic reasons: (1) the sick leave benefits for teachers are better today than they have been in the past, thus making it possible for teachers to stay home from work when they are too sick to be teaching children; (2) released time for teachers for professional growth improvement has increased the need for substitute teachers.¹

A study by Benthul² stated that absenteeism among regular classroom teachers averaged at least one out of every thirty days. Benthul went on to say that, if substitute teaching time were distributed evenly throughout the United States, each student would be with a substitute teacher for a total of seven days per school year. Another study generally supported Benthul's study, indicating that the typical public school student is taught six days per school year by substitute teachers.³ Still another study related that in 1965 there were over 200,000 substitutes employed in the public schools of the United States.⁴

The reader can readily perceive that substitute teachers comprise a sizeable group of school educators.

¹Ibid.
²Benthul, Herman F., "Upgrading the Substitute Program," Instructor, LXXIII (September 1963), 7.
⁴Ibid.
The very size of this group and their influence upon children would indicate to the reader that professional standards for them are as necessary as they are for regular classroom teachers.

The responsibility for administering a substitute teacher program primarily rests with two groups of school personnel: state and local school district officials. While this paper is concerned with the problems related to local administration of substitute teachers, the importance of the role of state officials cannot be overlooked. They formulate standards for certification of substitute teachers, as they do for regular classroom teachers. It is they who impose broad standards for employment which influence the supply of people available for substitute teaching in our schools. While local school officials establish whatever financial inducements are necessary to attract substitute teachers, it is the legislative and state department officials who basically determine retirement and educational standards for employment.\(^1\)

Local school boards and chief administrators have the responsibility of recruiting substitute teachers and providing them with general information needed to work in a given school district.

Looking first at some aspects of recruiting substitute

\(^1\)Bear and Carpenter, *op. cit.*, p. 39.
teachers, this writer found that some school systems have developed comparatively elaborate systems of recruitment, while others have little to offer other than a calling list and secretarial service for obtaining substitutes.

Some of the most frequently used methods of recruiting substitute teachers are: (1) by word of mouth—information passed to friends and neighbors about job openings; (2) through advertising media: newspapers and radio; (3) the use of teacher retirees; and (4) assistance from civic organizations such as: P.T.A., League of Women Voters, and the Association of American University Women.¹

Current literature and public school practice reveal some ways in which school systems may build a force of substitute teachers. One school system requires that applicants for substitute teaching agree that they will be available to teach for no less than thirty days per school year.² Such an assurance of service as this can more readily insure school administrators that there will be substitutes available for placement at such crucial times of the year as those days when illness—particularly epidemics—markedly increase the number of regular classroom teachers who are absent from work.


²"Requirements for Employment," a directive given to applicants for substitute teaching positions in the Detroit Public Schools, February 20, 1968.
Various plans exist for creating a reserve force of substitute teachers. In one plan described in the literature, a proportionate number of "floating teachers" would be hired by a school system.¹ These "floating teachers" are unassigned, qualified teachers, available to step into classrooms and take over in emergencies, especially during those times when the substitute teacher force is relatively depleted.

Another plan would encourage school systems to divide substitute teachers into two classifications, permanent and temporary.² Permanent substitutes would have proven their ability to teach children through past service; they would be especially useful for placement in classrooms with large numbers of disciplinary problems. They would be full-time employees, on the regular payroll. They would be provisionally certified to meet emergency conditions.³ Temporary substitutes would perform in the manner customarily assigned them: sporadic employment, available when


needed.

A plan described by the former superintendent of the Jackson Public Schools would give dual purpose to the substitute teacher. This plan would be to hire a body of substitute teachers on a permanent basis. On those days when they were not called for substitute teaching, they would assist the superintendent in curriculum activities, i.e.: updating manuals, assessing phases of the curriculum, and making school surveys. As the reader may perceive, employees of this type would have to be quite adaptable, perhaps people who do not care for the daily, ongoing type of work required of the regular classroom teacher, but at the same time are not deterred by the uncertainty of contingent assignment.

Durkin believes that school systems should employ permanent substitutes in proportion to the number of full-time teachers under contract. He believes that school districts with 51 or more full-time teachers should hire full-time substitute teachers. Whether or not the reader

1 Interview with Dr. Elvan Duvall, former Superintendent of the Jackson Public Schools, April 26, 1968.

agrees with the arbitrary figure of 51 regular teachers for hiring permanent substitutes is not so important as the underlying concept that is recommended. Perhaps school districts need to study the concept of developing a ratio between the number of permanent substitute teachers and the number of regular classroom teachers under contract.

Some authorities believe that better pay will encourage more qualified people to look to substitute teaching as a means of employment. Along with increased pay, some educators believe that school systems must go one step further: they must introduce classification levels, which provide competent substitutes with more money.¹ The Detroit Public Schools have implemented differential pay plans based upon certification, availability, and adaptability.² Substitutes who are (1) not fully certified, or (2) available for work less than three days a week, or (3) unwilling to teach wherever assignments occur are designated limited emergency substitutes. Their salary is based on length of service, those with up to 180 days of service on one pay scale, those with 181 to 360 days on a still higher pay scale. A second broad classification of substitute teachers is entitled unlimited substitutes.

¹Ibid.
Substitutes in this classification meet the aforementioned requirements of certification, availability and adaptability, and are paid accordingly. They too receive longevity pay on the same length of service plan described above. This school system also encourages liberal arts graduates who lack the necessary education courses for certification to enroll in a program that permits them to substitute teach as well as acquire the needed education courses. Applicants in this program must qualify for enrollment at Wayne State University, take nine courses over a fifteen-month period, for which they pay their own tuition, and be available for substitute teaching on the primary level during this period of time. Persons enrolling in this program have been placed on contract for the 1968-69 school year at a salary of $5,800. If they complete the college courses described above, they also become eligible for a Michigan teaching certificate.

Another Michigan school district pays $5.00 more per teaching day to those substitutes who are willing to work whenever called, and teach wherever placed, regardless of the distance from their homes.¹

An important aspect of recruitment is to have adequate information available for applicants at the time they are pursuing a substitute teaching job. By providing applicants with written information about job requirements, ¹

employers are more likely to encourage them to make an objective appraisal of themselves in terms of the requirements they possess for substitute work. A guidesheet for applicants may include information about certification requirements, fair employment practices, salary, and whatever employment evaluative practices are used by the school system. The application form itself should focus on obtaining information about the applicant. A health examination is important to protect children against disease as well as to inform the applicant of his state of health. Once hired, periodic health examinations are important for the same reasons just described.

Once recruiting procedures are established and substitute teachers hired, the next step is to contact them for employment when classroom vacancies occur. The telephone is the standard procedure used to contact substitute teachers. A common practice employed by larger school systems is to have one of the school secretaries do this work. If the system is large, two or more secretaries may be employed. Some large school districts contact substitutes through a telephone answering service. This may or may not be done through the school. One school system employs

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1 Form 4070, directive given to applicants for substitute teaching positions, Detroit Public Schools, July 1968.
a housewife to perform this service from her home.\(^1\)

In Euclid, Ohio, substitute teachers are called in alphabetical order, thus ensuring that all substitutes get equal employment.\(^2\) This practice is disregarded, however, when a teacher will be absent for an extended period of time. The idea here is that the employment of a single substitute for the same teacher during an extended period of absence provides instructional continuity for the students.

In another school system the problem of obtaining substitute teachers for schools is determined by impartial assignment. The school district is divided into three sections. Teachers are called on a rotational basis to work in each of these three sections.\(^3\) Through this procedure, this school system reduces the problems involved in obtaining teachers for schools that have comparatively few substitute teachers residing near them. But more importantly, such a plan could conceivably reduce the problem of finding substitutes for the "difficult" schools, i.e., those schools with comparatively large numbers of children with learning problems.

\(^1\)Jackson Public Schools, Jackson, Michigan.


\(^3\)Wilson, Donna, "Substitute Teaching Needs Teamwork to Click," Grade Teacher, LXXXIV (September, 1966), 163.
Once the substitute teacher has been recruited and generally acquainted with systemwide policies, procedures, and regulations by central office staff, concerns shift to the local school setting. The job of familiarizing the substitute teacher with information about the elementary school and grade in which he must teach becomes the responsibility of the elementary principal or his representative. Procedures differ for introducing substitute teachers to classrooms of students. Some principals, for example, provide substitutes with directions containing general information about the school routine, while others rely upon the substitute teachers' own initiative to obtain pertinent information from other teachers and building employees. Perhaps the important issue here is whether or not an organized procedure exists within a school building for disseminating information to substitute teachers.

Frequently, the school secretary is assigned the task of orienting substitute teachers to the school. She informs them of the location of their classrooms, acquaints them with the bell schedule, and provides them with information about attendance procedures.

One of the important responsibilities of the administrator in his relationships with substitutes is to keep them informed of special programs and activities that occur in his school. Lesson plans cannot always provide information about current school programs, especially if such
programs occur after lesson plans have been made. While substitute teacher handbooks, when issued, provide most of the basic information for school operation, substitute teachers need to be informed of rules, regulations, and problems unique to particular school buildings. For example, is the fire drill route for children easily understood through posted information?\textsuperscript{1} What are the school procedures for tornado warnings?\textsuperscript{2} Information about school assemblies and the seating arrangement is also important for the substitute teachers to have. They sometimes fail to receive this until the very last minute.

Frequently, the exigencies of the typical school day make it impossible for the principal to be available when the substitute teacher arrives at his school. A prepared guide sheet, listing basic information about the school will be greatly helpful to the substitute teacher.\textsuperscript{3} This, plus whatever supplemental information can be given by other school personnel, frequently is enough to get this person started for the school day.


\textsuperscript{2}Guide Posts for Substitutes, a handbook prepared in the Community Resources Workshop, Jackson Public Schools, Summer, 1968.

\textsuperscript{3}Benthul, \textit{op. cit.}, p. 7.
Another invaluable source of help for the busy principal is the help given by willing teachers who serve as helping teachers for substitutes.\(^1\) Usually a teacher who teaches the same grade, or nearly the same grade, as the one to be taught by the substitute teacher can be most helpful, since both have much in common for classroom instruction.

Perhaps the principal's general acceptance of the substitute teacher who works in his school is more important than all other interpersonal relationships that the substitute may develop during the course of his working day. The principal must make the substitute teacher feel welcome in his school.\(^2\) He must be able to help the substitute anticipate problems that may arise in a classroom. When possible, the principal should accompany him to the classroom, introduce him to the children, and show him where lesson plans and school materials are located. Above all, he must convey to him the belief that he has his full support in carrying out his plans for the day, and, if necessary, the substitute may call upon the principal to help him resolve problems occurring during the school day. This is especially so if the class has several children with social or learning problems.

Evaluation of substitute teaching can be difficult.

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\(^1\) Perkins, \textit{op. cit.}, p. 31.

\(^2\) Bear and Carpenter, \textit{op. cit.}, p. 40.
While most elementary principals acknowledge levels of competence among substitute teachers, especially those who teach for them on more than one occasion, they are sometimes reluctant to pass judgment upon their work. One reason for this is the current shortage of substitute teachers. Some administrators are so grateful to obtain people to do substitute work that they hesitate to evaluate their work. But principals cannot avoid for long the problems of evaluation, even though they might deliberately minimize them. Children, parents, and regular classroom teachers hold standards of competence for substitute teachers, and communicate their attitudes about them to administrators. Evaluation of their work, then, is an ongoing activity, even though this might at times be quite informal.

One method of evaluation employed in some school systems is to provide students with checklists. These checklists provide them with a method for evaluating substitute teacher performance.

Another method of evaluation is to have principals submit to the central office reports about the substitute teachers' work. This method provides the administration with a comprehensive picture of personal qualifications for substitute teachers. In one school system, a poor

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1Wilson, op. cit., p. 163.
rating on an evaluation report by two or more principals eliminates the person from the calling list.¹ Some might find this method too stringent. It would seem, however, that such evaluation would create high standards for employment, notwithstanding the possible effects upon the size of the substitute teacher force that an evaluation of this kind might have.

Frequent visits by the principal to classrooms at sporadic intervals throughout the day may provide him with information of how successfully substitute teachers are working with children.

Evaluation, of course, can be a two-way process. One system provides its substitutes with a checklist of questions about the working conditions of a school: Are lesson plans adequate?² Are materials and textbooks accessible? Are staff and administrative assistance available?

In comparatively large school districts, it is almost too much to assign a full-time elementary principal the multiplicity of tasks related to recruitment, education, and evaluation of substitute teachers. Two writers suggest that these responsibilities might be given to a substitute teaching committee, with representation from all school

¹Jordon, op. cit., p. 15.

personnel groups, including substitute teachers. Such a committee would give emphasis to an area of education which, the research indicates, is greatly neglected in a large number of American school systems.

Orientation Workshops

Typical orientation programs for substitute teachers are one-day sessions in which the superintendent opens the meeting, discusses overall school district policies, then turns the meeting over to one or more assistant superintendents, who discuss their areas of responsibilities. Frequently, substitute teachers attend the pre-school session also planned for new and inexperienced classroom teachers. In some instances, separate orientation sessions are provided for substitute teachers, but more often they attend sessions with regular classroom teachers. Usually these orientation sessions are held late in the summer. Sometimes they are held two or three times yearly, if the school district is large. A tour of all the schools in the district is frequently on the agenda. One writer states that substitute teachers are not paid to attend


2NEA, op. cit., p. 1.

3Nickerson, op. cit., p. 5.
orientation sessions in his school district.¹ This writer suggests, however, that attendance at workshops might be better if substitutes were paid for their efforts. Trenton, New Jersey, is one example of a school system that believes it is educationally feasible to pay substitute teachers for workshop attendance. This school system has a two-day session with pay for substitutes before school begins.²

A frequent practice at orientation sessions is to break up into sectional meetings, following the opening remarks and preliminary directions of school administrators. A sectional meeting for substitute teachers provides them with the opportunity to receive direct information about substitute teaching without the conflict of having to listen to other educational matters that are usually included in general orientation programs.³

Most educators probably would agree that meetings devoted to upgrading the education of substitute teachers should emphasize the teaching of reading, writing, and arithmetic. However, there are other concerns of importance too. It is important for substitutes to know some of the limitations placed upon them. For example, most

¹Rinaldi, Anthony J., "How to Get Qualified Substitute Teachers," School Management, VII (September 1963), 78.
²Nickerson, op. cit., p. 5.
classroom teachers frown on the substitute who ventures forth with his own instructional concepts. Most regular classroom teachers like to introduce their own subject-matter concepts, especially when they plan to be absent from school for only one or two days.

Substitute teachers should be prepared for those classroom teachers who leave skimpy lesson plans or no lesson plans at all. When this happens, the substitute should be prepared to implement a plan of his own. One substitute teacher developed his own plans, in the form of kits, which included material on weather, library, current events, and games. He also placed exercises, games, and activities in kits which covered a wide age range. Whenever possible he tried to place materials within the kits that were appropriate to the grade and curriculum of his classroom assignment.

There seem to be two schools of thought on the use of audio-visual equipment by substitute teachers. One writer believes that regular classroom teachers should not expect substitute teachers to operate audio-visual

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2NEA, op. cit., p. 15.

3Jackson, Rita, “Substitute Help Yourself,” The Instructor, (February 1963), 105.
equipment in order to carry out assignments.\textsuperscript{1}

Another believes that not only should substitutes know how to use some pieces of audio-visual equipment, but they also should be informed of the location of this equipment in the lesson plan book.\textsuperscript{2} One writer advocates that substitute teachers take it upon themselves, on their own time, to seek help from others in learning how to operate equipment.\textsuperscript{3} The writer of this paper recommends this latter course of action, provided that the school administration agrees and is informed of what equipment is to be used, and who is to use it. Ideally, the substitute teacher would obtain such training during a workshop experience. Moreover, he could usually find staff members who would give up a few minutes of their noon hour to help him learn to operate audio-visual equipment.

Does the school district have a policy about homework assignments?\textsuperscript{4} This is important to know. Parents may be touchy about having their children bring home school work to do. Substitute teachers should be informed of the policy by the school administration.

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\textsuperscript{1} Kaminsky, \textit{op. cit.}, p. 8.

\textsuperscript{2} Jordon, \textit{op. cit.}, p. 16.

\textsuperscript{3} NEA, \textit{op. cit.}, p. 15.

The orientation workshop for substitute teachers conducted by the White Plains, New York, school system is indicative of one type of program that is designed to educate as well as orient.¹ A series of six sessions are planned for substitutes, with each session focused on a particular phase of education. The first session is concerned with the role and responsibility of a substitute teacher; employment application information; school schedules; procedures; and general duties. The second session is concerned with how children learn; the structure of lesson plans; and individual differences among children. The third session presents the special services provided in this school district for children, i.e., psychological, health, testing, speech, etcetera. The fourth session is designed to provide substitute teachers with some possible ways of motivating children to learn; classroom discipline; and physical arrangement of classrooms. The fifth session presents some of the current curricular trends in education; audio-visual instruction; and methods of teaching reading. The last session provides the substitute teacher with information about teacher certification; evaluation; and professional organizations.

The White Plains approach to orientation is about as thorough as any encountered in the reading of the literature, except for those orientation workshops that local colleges and universities co-sponsor with public schools. Such co-

¹NEA, op. cit., p. 7.
sponsored workshops provide substitute teachers with education for the job of substitute teaching as well as education to help them meet state certification requirements.

One writer emphasized the importance of setting up standardized forms for substitute teachers to complete. Job application forms are usually standardized within a school district, but there is frequently considerable variance between what is done, if anything, about systematically providing substitute teachers with information about school policies, procedures, and job evaluation information.¹ This is especially true if no orientation workshop exists for substitute teachers.

Classroom visitation is an important part of the education of the inexperienced substitute teacher. It is not unusual for some school districts to have on their substitute employment roster people who have never experienced a day teaching children, other than that received in their student teaching experience. Being placed in a classroom with a large number of disciplinary problems can, for example, be quite alarming to the young girl or boy just out of college. Classroom visitation won’t solve all of the problems of beginning teachers, but it may help them develop some perspective of this business of teaching children.

The Denver Public Schools require substitute teachers to spend three days in classroom observation. No point is made of whether or not substitutes are paid for these three days of work. Bear and Carpenter, two writers who have spent some time studying the problems of substitute teaching, believe that participants should be paid by the school district for time spent in classroom visitation. 

There are some concerns about orientation programs for substitute teachers that, while not so important as those in the aforementioned pages, are necessary for their success on the job. Some authorities believe that substitute teachers should be responsible for correcting the assignments that they give to students. For some teachers it is discouraging to be greeted by a pile of uncorrected papers upon their return to work. Of course, if the lesson plans of the regular classroom teacher specifically call for work to be done that could not be corrected by a substitute during the normal teaching day, then that is something else. The reference here is to the substitute who innovates instructional plans of his own that necessitate a considerable amount of written work to be done by students. Whatever the case, much, few, or no uncorrected papers left for

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1Wilson, op. cit., p. 162.
2Bear and Carpenter, op. cit., p. 40.
3NEA, op. cit., p. 19.
the regular classroom teacher, there should be some understanding at the outset of the school year about written assignments, who should give and correct them.

A duty of the substitute teacher is to leave a written report of how the day progressed for him and the class. Notes about special problems that occurred with students, unusual events which took place, and enthusiasm for class assignments are important for the regular classroom teacher to have. It also gives continuity to the education of the children.

Housekeeping duties are an essential part of the substitute teacher's day.\(^1\) Of course, he is not expected to perform major custodial duties. However, in most cases, the room should be somewhat restored to the condition in which it was found at the beginning of the day. Children can help with this, with a little supervision from the teacher. They can straighten their own desks and put away papers, pencils, books, globes, and other equipment that they have used throughout the day. Perhaps this seems but common sense to the reader, really not a matter worth discussing at an orientation workshop. But it is true that substitute teachers, like home-makers, have varying standards of housekeeping. It was stated in a doctoral dissertation that the morale of the entire staff was adversely affected by a substitute teacher who was not only sadly

\(^{1}\textit{Loc. cit.}, p. 21.$
lacking in housekeeping standards but ethical standards as well.

MacVittie reported the following comments made by a regular teacher about the substandard performance of her substitute teacher:

"Of all the problems in the area of professional relationships...was one which to the examiner has a humorous side too. Upon returning from an illness of five days she [the regular classroom teacher] found, among other things, a stack of uncorrected papers 2-1/2 inches high...room like Coney Island swept ashore...children on the border of hysteria, and most unusual of all, every teacher on the floor, and those who use the lunchroom, downright angry because the substitute had pestered them to buy her cosmetics. It seems she was more enthusiastic as a saleswoman than as a teacher."

The substitute teacher should be informed of the school or school district policy of keeping children after school to do their work or as punishment for misbehavior. Keeping children after school without informing their parents can be risky business, under the following circumstances: (1) children who must cross at busy intersections with the aid of adult crossing guards, whose on-duty time is limited to a few minutes after the dismissal bell; (2) children whose parents do not have telephones, therefore cannot be notified that their children will arrive home later than usual; and (3) bus children. One school system also raised an

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issue in their substitute teacher handbook that was not encountered in other literature on this problem. This is the matter of male substitute teachers keeping upper grade girls after school.\textsuperscript{1} The manual of this particular school system states that "men substitutes shall NOT [upper case letters theirs] keep girls after school under any conditions. See your principal for clarification."

In an orientation workshop, substitute teachers should be informed of those duties and activities which they are not expected to perform, as well as those which they are expected to perform.\textsuperscript{2} Generally, substitute teachers are not expected to: administer or correct standardized tests; report pupil progress; introduce major units of work; or permit pupils to take home school materials other than their assigned textbooks. Today, schools seem more willing to grant children permission to take home school materials. However, experienced teachers caution children about taking care of such materials. The inexperienced substitute teacher sometimes forgets to give students these precautions.

The substitute teacher should be encouraged to subscribe to at least one professional journal.\textsuperscript{3} After all,

\begin{itemize}
\item \textsuperscript{1}Substitute Teachers' Handbook, Flint Community Schools, Flint, Michigan, 1968, p. 7.
\item \textsuperscript{2}NEA, op. cit., p. 22.
\item \textsuperscript{3}Bear and Carpenter, op. cit., p. 41.
\end{itemize}
he is now a member of the profession and with this comes the responsibility of keeping abreast of current educational trends. Orientation workshops can provide sample copies of professional journals for substitutes for their perusal.

Inservice Workshops

Inservice education workshops for substitute teachers provide them with opportunities to improve their instructional skills through professional growth activities. The basic difference between inservice workshops and orientation programs is: the former provide help for substitutes who have proven that they can work in schools in this capacity, whereas the latter are generally for people who are comparatively new to substitute teaching. This distinction between orientation and inservice workshops cannot be made in all situations. Some orientation workshops go beyond orienting substitutes for their jobs, by providing some of the finer points of classroom instruction, especially subject-matter education.

Workshops of an inservice nature are varied, with some more or less refresher courses. Others are more elaborate, offering special inducements to attract enrollees. Some are called seminars, some refresher institutes, still others training workshops, for those persons who would serve as substitute teachers.¹

¹Etten, op. cit., p. 13.
The Euclid, Ohio substitute teaching force consists of 70 substitutes, with 45 of these in the elementary level.\(^1\) Over the years, this school system has found it worthwhile to hold inservice workshops early in the fall.\(^2\)

One school district has the assistance of a central, parent-teacher council. Both the school district and the council co-operatively sponsor a series of six, two-hour sessions for substitutes and prospective substitute teachers.\(^3\) Here, then, we have a school district enlisting the support of the local school-community to prepare as well as upgrade the education of those who are interested in substitute teaching. Another school district has sponsored 10-week evening courses for substitutes. An advantage of evening courses is that substitutes can obtain their education while doing substitute teaching during the day time.\(^4\)

One school system employs a 20-to-1 ratio of substitute teaching work days and inservice training days: Substitute teachers must attend one institute session for each 20 days of accumulated substitute teaching.\(^5\)

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\(^1\)Jordon, op. cit., p. 15.
\(^2\)Ibid.
\(^3\)Woodbury, op. cit., p. 24.
\(^4\)NEA, op. cit., p. 9.
\(^5\)Nickerson, op. cit., p. 11.
Some school districts use the services of local colleges in the preparation of substitute teachers. A model example of inservice training with college credit given is the program sponsored by San Bernardino County, California.\(^1\) There, substitute teachers attend 10 full-day sessions of classwork, with college credit given by the University of California Extension, upon satisfactory completion of the course. Oak Park, Illinois, stipulates that substitute teacher applicants must participate in 10 clock-hours of inservice training. If individual participants cannot do this because of personal commitments, they must work out a planned program of classroom observation and participation in staff meetings that are planned during the school year for the regular faculty.\(^2\)

Bear and Carpenter\(^3\) advocate that school systems broaden their perspective in this matter of preparing substitutes for employment. They believe that school systems should, in addition to preparing substitute teachers for short-term employment, look to inservice education as a method of converting substitute teachers to regular classroom teachers. They propose that substitutes be enrolled in a brief internship program that would permit them to be teacher-helpers for part of a day, at regular pay. Bear and Carpenter suggest that such internship be

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\(^1\)Koc. cit., p. 12.
\(^2\)NEA, op. cit., p. 2.
\(^3\)Bear and Carpenter, op. cit., p. 152.
done under the supervision of above-average classroom teachers. These writers admit that their plan needs more clarification. Such clarification, they add, would come from the operation of a plan, or the modification of theirs, by some school system. The writer of this paper would suggest that such a plan should also provide some remuneration for those above-average classroom teachers who would agree to sponsor individuals in an internship program of this type.

For the past four years, a unique plan for involving persons from the local school-community who have no college training has been carried on in the Baltimore Public Schools. This plan, designed to identify potential substitute teachers in the neighborhood, is carried on right in the local school setting. For six weeks, inservice sessions are held from 9:15 A.M. to 11:15 A.M. on those alternate Fridays which were paydays. Those particular days were chosen for inservice education because the administration felt that most teachers would report for work on these days, consequently the demand for substitutes would be less, and most of their substitutes would be free to attend these inservice sessions. Participants in the program have no assurance that they will qualify for substitute teaching upon their completion of the six weeks' course. Some of them decide not to become substi-

\footnote{Brackett, Pearl C., "Substitute Training at Belmont School," \textit{National Elementary Principal}, XLVI (May 1967), 19.}
tute teachers, realizing that they are not personally suited for such work, or that they need more formal education before they can competently pursue such work. Baltimore Public Schools can operate a program for substitutes like this because standards have been modified to meet the acute shortage of qualified substitutes existing in their schools.

While it is true that the Baltimore schools find comparatively few substitutes this way, the plan does have certain advantages: (1) it opens the door for neighborhood people to become employees within their own areas; (2) it also gives applicants an opportunity to become teacher aides, should they not qualify as substitute teachers; (3) it provides local people the opportunity to become directly involved in the complex business of educating children, hopefully to help them become better informed citizens; and (4) it upgrades the education of local people, providing them with an opportunity to appraise their own abilities and decide if they should enroll in education courses for themselves.

Inservice workshops particularly differ from most orientation workshops in that they attempt to give some in-depth education to participants in subject matter. Frequently, substitutes attend grade-level sessions.¹

Arithmetic and reading are subjects most frequently found on the agendas of grade-level workshops. This subject-matter emphasis for substitutes is no different than that basically provided for regular classroom teachers in their inservice workshops.

The Substitute Teacher and Student Discipline

Very little information has been written about the substitute teacher and student discipline. This writer was impressed by the dearth of information on this subject.

Most substitute teachers have encountered disciplinary problems at some stage in their teaching. Those who have learned to cope successfully with disciplinary problems find substitute teaching a rewarding occupation. Those who are unable to cope with student discipline seldom remain substitutes for long. One of the important pursuits for a substitute teacher to practice is the implementation of ground rules for good discipline.¹ Children appreciate knowing the type of behavior that is acceptable to the substitute teacher. The substitute who indicates to students his standards for discipline early in the teaching day is more likely to be accepted by them than one who fails to do this.

A good rule for the substitute to practice is to make

no false promises to children; whatever is promised should be carried out. The substitute who is honest in his relationships with students can do much to make his day worthwhile for himself and the students.\(^1\)

When group activities are operative in the classroom, it is usually a good idea for the substitute to station himself near the activity.\(^2\) Substitutes who do not locate themselves near ongoing activities sometimes fail to maintain the proper discipline for them.

Occasionally, a substitute will resort to group punishment as a means of controlling students.\(^3\) While this technique may be effective in those situations where group guilt exists, it frequently is misapplied. The substitute who threatens students with group punishment for misdeeds lowers the students' estimation of his teaching ability. Students realize that the substitute is threatening them. The substitute who implements group punishment may create resentment among children and their parents, for both realize that few classroom situations occur in which all children are equally guilty.


\(^2\)Loc. cit., p. 20.

\(^3\)Uniform Discipline Code of the Jackson Public Schools, Jackson, Michigan, (September 1968), 5.
A cardinal rule for substitute teachers to follow is: try not to personalize student misbehavior. Usually the child is more concerned with his own problems and his opinions of how his peers perceive him than he is in deliberately trying to embarrass the teacher. The substitute who is inclined to personalize student misbehavior not only gives undue attention to the problems of certain students, but he frequently loses sight of the real purpose of student discipline: to eliminate that behavior which detracts from good classroom instruction.

Responsibilities of the Regular Classroom Teacher For the Substitute Teacher

The regular classroom teacher has definite responsibilities for providing a good working environment for the substitute teacher. It is he who is the pacesetter for instruction, discipline, and housekeeping. But the regular teacher does not have to do the job by himself. If he is wise, he will enlist the support of some of his students as substitute-helpers. He will instruct them to help acquaint his substitute with some of the routine duties that can sometimes harrass a substitute as well as create discipline problems for him. Student helpers, when properly used, can free a teacher from tasks which prevent him from devoting his energies to instruction. While it is true

1Teacher's Letter, op. cit., p. 3.
that a good deal of absence on the part of the regular classroom teacher is unplanned, he can, at the beginning of the school year, impress upon his students the need for their assistance in helping the substitute feel accepted.¹

The teachers of the New Albany, Indiana, school system are instructed in their substitute teacher handbooks to provide a host or hostess to welcome substitute teachers and to provide them with information about some of the routine operations of the class throughout the day.²

But the most important task for the regular teacher is to provide the substitute with a workable set of lesson plans. While thoroughness and up-to-dateness are most important, lesson plans can sometimes be too prescriptive, too detailed, to the point that there is little chance for the substitute to employ his own imagination in his work as a substitute teacher.³ More often than not, however, this writer acknowledges that lesson plans tend to be skimpy rather than complete. Some educators believe that the substitute teacher should be given the freedom to decide whether to follow the lesson plans or substitute his


³Hyak, James, "Why Substitute?" NEA Journal, LIII (September 1964), 45.
own plans in the classroom. While it is true that substitute teachers have some plans and ideas of their own that would certainly enrich the education of students, too often the opposite is true. The curriculum guide, as expressed through the lesson plan book, provides broad controls, without restricting a teacher's imaginativeness from being expressed through his teaching.

The need for filler material is helpful for the substitute teacher who finds that he is unable to get as much out of the lesson plans for students as indicated by the regular teacher. Lesson plans do not always turn out as intended by the regular teacher; if appropriate filler or additional material is included, the substitute has something extra to rely upon.

This principal recommends to his teachers that in addition to the standard lesson plans, they include in their lesson plan book some filler material which can serve as an emergency set of lesson plans. It is further suggested that these emergency plans not be related to particular times or seasons of the year, but that they be broad in nature. Should the classroom teacher fail to get his plans up-to-date for one reason or another, his substitute teacher can turn to the emergency plan for direction.

While the lesson plan book is the tool of communication

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1Wilson, op. cit., p. 160.
2Kaminsky, op. cit., p. 8.
for instruction, it also should serve to acquaint the substitute with the many ancillary activities of the day. The substitute may need to know: the names of the children in his room who ride the bus; the bell schedule; the schedule of special services, i.e., the gym, music, library schedules. He also needs to have a seating chart, attendance roster, and lunch lists. It is also important to include information about special events, assemblies, and guests who are scheduled to be in the building. Fire and tornado information is important, too, as previously indicated in this paper. Another bit of information frequently overlooked are the names of children who leave at various times throughout the day for various purposes: children who participate in the band, safety patrol, student council, stage crew, and cafeteria work, among others, should be listed in the plan book.

It is helpful for the regular teacher to include the name and classroom location of another member of the staff who can serve as a helping teacher for his substitute. The substitute needs someone to whom he can confide when the principal is unavailable.

One writer suggested that it is a good idea for the regular classroom teacher to leave his home phone number in his lesson plan book. This eliminates the need for asking the busy office secretary to obtain this information.

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1Kaminsky, op. cit., p. 8.
An added touch is for the regular teacher to send his substitute a note of appreciation for taking his class.\(^1\) Perhaps this gesture is especially appreciated in those situations where the substitute has worked several days for a teacher or has had a particularly difficult classroom to manage.

One teacher, who had previously been a regular teacher before turning to substitute work, stated that every classroom teacher should occasionally serve as a substitute teacher within his own building.\(^2\) He believes that only then would regular classroom teachers be in a position to assess the quality of work done by those substitute teachers who work in their schools throughout any given school year. This same writer goes on to say that the level of conversation about substitutes by regular teachers might be elevated, as a result of such experience.

The Typical Substitute Teacher

Several articles have been written about the personal characteristics of substitute teachers. While these articles make no attempt to draw firm conclusions about people who do this type of work, they do provide the reader with some perceptions of writers who have studied the problems related to substitute teaching. The findings from one

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\(^1\) Bear and Carpenter, *op. cit.*, p. 41.

study indicated that the number of college courses completed by a substitute was an unreliable predictor of classroom competence.\footnote{Warren, Thomas Edward, "The Relationship Between Performance Ratings and Selected Characteristics of Substitute Teachers in the Cincinnati Public Schools." (Unpublished Doctor's dissertation, George Peabody College for Teachers, Nashville, Tennessee, 1964), Abstract: Dissertation Abstracts, Volume XXV, (April, 1965), p. 6361.} This same study also stated that grade-point average in college was a poor predictor of performance in substitute teaching, as was the number of years of substitute experience and the type of teaching certificate held. Better predictors of success were age and sex, plus the number of years of regular teaching experience that a substitute has in his background. Substitute teachers who were sixty years of age or older had lower performance ratings than all other age groups. Male substitute teachers, as a group, were considered to be less competent than female substitutes, age having little affect upon their performance rating. This study also indicated that those with four to seven years of substitute experience had higher performance ratings than those with all other experiential backgrounds. Teachers with but one to three years of experience generally placed higher on performance ratings than those with twelve or more years of experience. In summary, this particular study indicated that comparative youth is the primary factor that determines success in substitute teaching. Other factors -
formal education and experience - were relative to youth.

Greenlee presented in his study, reasons that women give for turning to substitute teaching as an occupation. The reasons were that they: (1) may want only part time employment; (2) may not be qualified to hold regular teaching positions; (3) may prefer to work as a substitute teacher in their own communities rather than teach full time in other communities; (4) may hope to use substitute experience as employment reference for future teaching positions; (5) may be trained but inexperienced teachers who want to break in gradually into the profession; (6) may be persons who have failed to secure regular jobs.\(^1\)

Nickerson points out in an aforementioned reference of this paper that people apply for substitute work because they (1) like this type of work; (2) have financial need; and (3) hope to eventually become permanent teachers.\(^2\)

Perhaps some educators view the presence of the substitute teacher as something really not a part of the mainstream of education. The word "substitute" indicates just that: someone or something that is temporary. Bear and Carpenter, two proponents of the need for upgrading the competence of substitute teachers on a nationwide scale, believe that this phase of teaching represents one of the


\(^2\)Nickerson, op. cit., p. 5.
most serious weaknesses in American education. They found in a survey which they conducted that substitute teachers are generally dissatisfied with the quality of work that they do in our schools. Another writer supported this opinion, stating that substitute teachers have been referred to as the "forgotten men and women of the enterprise." This same writer went on to say that the term "substitute" in itself implies a lack of stature, and that it might be replaced, as it has in some school systems, with the terms "reserve" or "supply teacher." But this is hairsplitting, the same sort of hairsplitting that often occurs when the regular classroom teachers are referred to as "schoolteachers" rather than "educators." Perhaps such terms do carry unfavorable connotations; but the real issue is whether or not the educational base for substitute teachers equips them to satisfactorily take their place in society as workers who may earn recognition through productivity in preference to reliance upon labels.

In one study of seventy-five New England school systems in communities of more than 9,000 but less than 50,000 population, MacVittie found that substitutes, principals, and regular classroom teachers expressed three basic

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1Bear and Carpenter, op. cit., p. 39.
2Ibid.
dissatisfactions with this type of work: (1) personal conflict over the uncertainty of daily assignments; (2) a no-pattern, day-to-day existence, and (3) inability to see the results of work with children.¹

Harmon, in a 1965 doctoral study on the administration of substitute teaching, stated that the responsibility of administering a substitute teacher program should be placed upon the school superintendent, and that the methods of selecting and upgrading the education of substitute teachers should be the same as those used in working with regular classroom teachers.²

If the work situation for substitute teachers is so negative as the previous findings would indicate, then it would seem that administrators should be most concerned with hiring those substitutes who have a positive orientation for this type of work. One substitute suggested that those people who have a real need for more identification with people, to divert their preoccupation with domestic trivia, frequently make good candidates for substitute work.³ These people, this writer implies, are

¹MacVittie, op. cit., p. 53.


stimulated by the visual, aural, and tactile sensations that associations with children provide. All well and good, but the first dimension of good substitute teaching must be met: professional competency. The capacities for liking children and teaching them are not necessarily possessed in equal measure by those who substitute teach. For substitute teaching, individuals must clearly demonstrate that they have a great capacity for educating children while they are enjoying them.

Substitute teaching, for some, holds occupational assets that no other job can offer. For those who enjoy flexible work and the opportunity to be educated themselves—as they educate children—substitute teaching is unsurpassed.¹

Organization of the Report

Chapter I has presented the purposes for which this study was undertaken and its importance to the Jackson Public Schools. A review of the literature has also been presented.

Chapter II will present a discussion of the construction of the four questionnaires used to obtain information for this study. This chapter will also discuss the preparation of the research paper and the submission of it for criticism and approval by the project research

¹Hyek, James L., "Why Substitute?" MEA Journal, LIII (September 1964), 45.
committee.

Chapter III will present and analyze the data of the four questionnaires and a cross-sectional comparison of some of the related questions found in two or more of them.

Chapter IV will summarize the findings of the four questionnaires and present the conclusions and recommendations related to the findings of the study.
CHAPTER II

PROCEDURES USED IN THE STUDY

The Problem

The purpose of this part of the report is to present the procedures used to obtain information for this study. The problem was to develop an instrument for obtaining information, to select the respondents, to administer the instrument, and to compile the data received from the respondents.

Development of the Instrument

In the past, efforts of the Jackson Public Schools to encourage people to apply for substitute teaching have relied mostly upon: (1) local newspaper advertisement, (2) college employment bureaus, and (3) verbal communication with teachers, both active and retired. While these methods have satisfactorily met the demands for elementary substitute teachers during normal periods of absenteeism of regular classroom teachers, they have not been adequate for the reasons previously indicated in the introduction of this paper.

In order to understand the dimensions of the problem related to the recruitment, education, and placement of substitute teachers, more information was needed from
those who directly and indirectly were responsible for doing this type of work. This writer turned to the questionnaire as the basic instrument to obtain such information.

The questionnaire was used to obtain virtually all of the field information from those who live in the Jackson area concerned with this study, as well as from personnel directors who live in various parts of the State of Michigan. It would have been too time-consuming to directly interview each of the persons who supplied information for this study. The questionnaire is a recognized educational instrument for obtaining information from people who are scattered throughout parts of the community or communities, therefore making it difficult to personally contact them for information.¹

One of the problems encountered in developing questionnaires was to include questions which viewed the concerns of substitute teaching from the perspective of the respondent. Being a school principal, this researcher was inclined to perceive of the problems of substitute teaching from the principal’s perspective. However, substitute teachers, regular classroom teachers, and personnel directors perceive of the problems of substi-

tute teaching from their own perspectives. Therefore, construction of the questionnaires other than the one given to principals required help from others.

Several substitute teachers were contacted about the questionnaire for substitute teachers. Their suggestions provided important information. Hubert Clarke, personnel director of the Jackson Public Schools at the time of this study, provided information for the construction of the questionnaire for personnel directors. Several classroom teachers, especially those in the two schools in which this researcher was principal, offered suggestions in the development of the questionnaire for regular classroom teachers.

Three types of questions were included in the four questionnaires: questions in which the respondents simply made "yes" or "no" replies; questions in which the respondents made "yes" or "no" replies, then added supportive sentence explanations to their yes-no replies; and questions that asked for sentence-type responses.

In the questionnaire administered to substitute teachers, thirty-seven per cent of the questions elicited "yes-no" responses; twenty-three per cent of the questions elicited "yes-no" responses plus supportive, sentence explanations; and forty per cent of the questions elicited sentence responses.

Twenty-seven per cent of the questions in the personnel directors' questionnaire elicited "yes-no" responses; forty-five per cent of the questions elicited "yes-no" answers
plus supportive, sentence explanations; and twenty-seven per cent elicited sentence responses.

In the questionnaire administered to principals, twenty-three per cent of the questions elicited "yes-no" responses; forty-seven per cent elicited "yes-no" responses plus supportive, sentence explanations; and thirty-one per cent elicited sentence responses.

Fifteen per cent of the questions in the regular classroom teachers' questionnaire elicited "yes-no" responses; thirty-five per cent elicited "yes-no" responses plus supportive, sentence explanations; and fifty per cent elicited sentence responses.

Averaging the total number of questions from the four questionnaires that evoked one of the three types of aforementioned responses, it was found that: (1) twenty-six per cent of the questions elicited "yes-no" responses; (2) thirty-seven per cent elicited "yes-no" responses plus supportive sentence explanations; and (3) thirty-seven per cent of the questions elicited sentence-type responses.

Once the four questionnaires were constructed, they were then submitted to the members of the project committee for their examination. The committee members made several suggestions about how some of the questions might be improved. They suggested that some of the questions be rephrased so that they expressed more succinctly the information they attempted to convey to respondents. A notable
deficiency contained in the wording of some of the questions was a tendency to overlook the social courtesy of asking rather than requesting respondents to provide information for specific questions within the questionnaire.

After the committee members approved of the content of the four questionnaires, they were then retyped and mailed to the respondents.

Administration of the Instrument

The substitute teachers' questionnaire was sent in July 1968, by means of the United States mail. The majority of the respondents returned the questionnaires within a period of two weeks. Some of the questionnaires were not returned until later in the summer, because some of the respondents had been on vacation and did not attend to their questionnaires until after they had returned to Jackson, Michigan.

The questionnaire for personnel directors was sent to them by the United States mail in August. Of the four groups receiving questionnaires, this group was most prompt in returning the completed questionnaires. They did this within a period of two weeks.

The elementary principals received their questionnaires during one of their pre-school workshop days for administrators. They completed the questionnaires at one sitting, during a session that lasted approximately 30-40 minutes.

The regular classroom teachers received their question-
naires during the middle of October. It was decided not to send them until this time because of their involvement with getting the new school year underway.

The questionnaire given to substitute teachers was the longest of the four types of questionnaires. It consisted of thirty-five questions, eighteen of which sought phrase or sentence responses; the remaining seventeen questions elicited "yes-no" or "check-type" replies. One hundred questionnaires were mailed. Eighty-three were returned, an eighty-three per cent response.

The questionnaire given to personnel directors consisted of twenty-two questions, sixteen of which sought phrase or sentence responses; the remaining six questions elicited "yes-no" or numerical replies. Thirty-two questionnaires were mailed. Twenty-eight were returned, an eighty-seven per cent response.

The questionnaire given to Jackson elementary principals consisted of twenty-six questions, eighteen of which sought phrase or sentence responses; the remaining eight questions elicited "yes-no" responses. All twenty of the elementary principals of Jackson completed the questionnaires.

The questionnaire given to Jackson elementary teachers consisted of twenty questions, seventeen of which sought phrase or sentence responses; the remaining three questions elicited "yes-no" responses. One hundred and fifty ques-
Questionnaires were sent to the twenty elementary principals of Jackson, with instructions for them to give copies of the questionnaire to only those teachers who were interested in participating in this study; one hundred and fourteen completed questionnaires were returned, a seventy-six per cent response.

Following a tabulation of the four questionnaires, cross-sectional comparisons were made of responses to some of the related questions found in two or more of the four questionnaires.

Development of the Research Paper

When the completed questionnaires were returned, the data were then compiled. Work first began with the questionnaire given to the substitute teachers. All information, no matter how unrelated some of it appeared, was placed into broad categories for tabulation. Next, the items in these categories were re-categorized into related groups. Singular responses deemed to be unrelated to the purpose of this study were deleted at this time. Those singular responses which appeared worthwhile were not deleted but were recorded separately for possible inclusion in the research paper. The same procedure was followed in categorizing the information found in the other three questionnaires.

Following these attempts at organizing and refining the information received from the four questionnaires, work began on the first draft of the research paper. This led
to the writing of the second draft of the paper, the draft which was submitted to the members of the project committee for their consideration.

Several suggestions for revision were made by the project committee. Parts of Chapters I, II, and III were reorganized, and suggestions were made for improving Chapter IV. The third draft, then, was submitted to the project committee for approval and was basically accepted, except for minor suggestions for revision. The fourth draft was submitted to the committee in partial fulfillment of the Specialist in Education degree.
CHAPTER III

DATA PRESENTATION AND ANALYSIS

The Problem

The purpose of this chapter is to present and analyze the data of the four questionnaires used to obtain information for this study. Some of the information will also be presented in tabular form.

Questionnaire Given to Substitute Teachers

Ninety-nine per cent of the people who responded to this questionnaire had recently been active in substitute teaching. Question 1 asked: Did you accept substitute teaching assignments during the 1967-68 school year in the elementary schools of the Jackson Public Schools? Thanks to a conscientious secretary\(^1\) of the central office, a current listing of elementary substitutes was prepared, with the names of those inactive during 1967-68 removed from the list. Only half of this group, however, replied yes to question 2: Do you plan to do so again during 1968-69? This turnover was large but, as question 3 will show, short term employment among Jackson substitutes was not unusual. These substitutes tended to be marginal

\(^1\)Helen Steck, secretary to the personnel director of the Jackson Public Schools, 1967-68.
employees, either planning to become regular teachers at some future time, or accepting this type of employment because of personal circumstances which necessitated that they be irregularly employed.

Question 3 asked: How many years have you served as an elementary substitute teacher in the Jackson Public Schools? The replies revealed that forty-eight per cent of the substitutes had one year or less of substitute teaching experience in the Jackson schools. A total of seventy-five per cent of them had but one-to-three years of substitute experience in this school system. Table I provides a breakdown of the number of substitutes and the experiential levels to which they belong.

Question 4 asked: How many years of college had you completed before you became a substitute teacher in this school district? The response indicated that Jackson substitutes were predominately college graduates. Four years of college had been completed by sixty-one per cent of this group. Only six per cent have had five years or more of college. A proportionate number have completed but two years of college, as indicated in Table II. The reader can perceive from this phase of the study that most elementary substitutes are not deficient in undergraduate education. However, it cannot be assumed from this that the majority of our substitutes possessed valid teaching certificates.
### TABLE I

**ELEMENTARY SUBSTITUTE TEACHERS AND THEIR YEARS OF SERVICE IN THE JACKSON PUBLIC SCHOOLS**

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Length of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Less than 1 year</td>
</tr>
<tr>
<td>28</td>
<td>1 year</td>
</tr>
<tr>
<td>22</td>
<td>1-1/2 - 3 years</td>
</tr>
<tr>
<td>16</td>
<td>4 - 10 years</td>
</tr>
<tr>
<td>2</td>
<td>12 - 15 years</td>
</tr>
<tr>
<td>1</td>
<td>25 years</td>
</tr>
<tr>
<td>2</td>
<td>No response</td>
</tr>
</tbody>
</table>

### TABLE II

**YEARS OF COLLEGE COMPLETED BEFORE BECOMING A SUBSTITUTE TEACHER**

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Years of College</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>One year</td>
</tr>
<tr>
<td>21</td>
<td>Two years</td>
</tr>
<tr>
<td>7</td>
<td>Three years</td>
</tr>
<tr>
<td>51</td>
<td>Four years</td>
</tr>
<tr>
<td>4</td>
<td>Five years</td>
</tr>
<tr>
<td>1</td>
<td>Eight years</td>
</tr>
</tbody>
</table>

Active teaching service, spread over five-year periods, is a Michigan requirement which those with family responsibilities cannot always maintain. Consequently, they frequently lose certification for teaching in Michigan schools even though they meet the formal education requirement.
In response to Question 5, **how many college hours have you earned since becoming a substitute teacher?**, eight per cent had taken from two to six hours of additional courses; six per cent had taken from nine to fifteen additional hours. A total of fourteen per cent, then, had pursued additional courses. Other replies to this question were too scattered for concentrated measurement. In summary to this question, it appears that those who did substitute work in Jackson terminated their formal education at the undergraduate level—at least before and during the time when they were employed as substitute teachers.

Question 6 asked: **What was your undergraduate major?** The response revealed that thirty per cent majored in elementary education; twelve per cent in social studies; and twelve per cent in English. Undergraduate majors for the remaining forty-six per cent did not concentrate in particular categories, but were spread over many subject-matter areas, from architecture, for example, to philosophy.

In answer to Question 7, **did you first have some experience as a full-time classroom teacher before becoming a substitute teacher?**, substitutes stated that most had had this experience. Sixty-two per cent replied yes to this question, thirty-seven per cent no, with two per cent not responding to the question. At this time, therefore, it
could be said that Jackson schools were able to staff their classrooms with people who had had at least some exposure to the classroom situation.

Question 8 asked: Have you done most of your substitute teaching in more than one elementary school in this district? From the response the reader might assume that the elementary substitutes of Jackson go where needed. Eighty-seven per cent replied that they had done substitute work in more than one school. A look at Table III, however, will show that some substitutes were available for employment in only a limited number of schools.

TABLE III

NUMBER OF SCHOOLS IN WHICH SUBSTITUTES DID MOST OF THEIR SUBSTITUTE TEACHING

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Number of Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>One school</td>
</tr>
<tr>
<td>17</td>
<td>Two schools</td>
</tr>
<tr>
<td>18</td>
<td>Three schools</td>
</tr>
<tr>
<td>18</td>
<td>Four-six schools</td>
</tr>
<tr>
<td>8</td>
<td>More than six schools</td>
</tr>
<tr>
<td>9</td>
<td>No response</td>
</tr>
</tbody>
</table>

Question 9, subsequently related to question 8, pertained to those who replied "yes" to question 8; it asked: In which schools have you done most of your substitute teaching? Sixteen per cent revealed that they had done
most of their substitute teaching in one school; twenty per cent replied that they had done most of their substitute teaching in two schools; twenty-two per cent in three schools; twenty-two per cent in four-to-six schools; and only ten per cent went to seven or more schools. In summary, then, only one-tenth of the substitutes were placed wherever they were needed in the city; about one-third of the substitutes went to only one or two schools; and about half of the substitutes were available for work in more than two but less than seven schools. But the response to question 10, Why have you chosen to teach in the above school(s)? appeared to contradict the response to question 9. Of the total substitute body, forty-three per cent replied that they "go where requested." But substitute placement was not altogether determined by the substitute teacher.

The opinions of elementary principals influenced substitute placement, with substitutes sometimes unaware of this. A principal may have informed the secretary who contacted substitute teachers that substitute 'X' found teaching difficult in his school, whereupon the placement secretary then directed substitute 'X' to other schools for employment. Thus, while the substitute believed that he was available for general placement, others had directed him to certain schools only. Sometimes a principal would make it known to the placement
secretary that he preferred certain substitutes in his school, that he only wanted others called when these were unavailable. Some substitutes, therefore, became somewhat accustomed to assignment at certain schools because of relative teaching success rather than preferred school placement. Table IV provides the reader with reasons for school placement, as indicated by substitute teachers.

TABLE IV
REASONS THAT SUBSTITUTES GAVE FOR SUBSTITUTING IN PARTICULAR SCHOOLS

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>Close to Home</td>
</tr>
<tr>
<td>36</td>
<td>Go Where Requested</td>
</tr>
<tr>
<td>9</td>
<td>Requested by</td>
</tr>
<tr>
<td></td>
<td>Certain Principals</td>
</tr>
</tbody>
</table>

In response to question 11: How many consecutive school days do you like to teach at a given time? A majority of substitutes preferred teaching for one week or less. Most stated that they desired two or three day assignments. To this writer's surprise, few stated that they preferred one-day assignments over other alternatives. Table V denotes preferred lengths of employment, as indicated by substitute teachers. Only eighteen per cent of the substitutes stated that they would accept assignments
The response to question 12 is of particular interest for elementary principals. Question 12 asks: *Do the faculty members of some schools seem to welcome you as a substitute teacher more than others?* Sixty-five per cent replied "yes" to this question. Replies to this question showed substitutes to be concerned with the degree of friendliness that they received in the schools where they taught: twenty-eight per cent stated that "some schools are friendly, some aren't." This response, however, may be inconclusive. In order to determine what these substitutes perceived to be "friendliness", this writer would have had to ask more questions of substitutes, since the noun "friendliness" is rather abstract when considered without qualification. Then, too, some may have replied to this question who had done substitute teaching in a limited number of schools; with little or no experience in the majority of the nineteen schools of Jackson, their opinion of friendliness, or lack of it, could have been based upon limited experience.

Substitute teachers tended to accept assignments in both lower and upper elementary grades, as indicated by the response to question 13: *Do you substitute in both lower and upper elementary grades?* Sixty per cent replied that they accepted both lower and upper elementary assignments, while thirty-seven per cent indicated that
they did not. Those who restricted themselves to either level of elementary teaching were more likely to have preferred the younger children rather than the older ones. Twenty-three per cent indicated that they preferred lower elementary children over upper elementary children, but only ten per cent had a preference for upper elementary over lower elementary children. It is this writer's belief that these findings substantiate what most elementary principals in Jackson experienced: substitutes, generally, were more difficult to obtain for upper grades than lower grades.

**TABLE V**

**NUMBER OF CONSECUTIVE DAYS THAT SUBSTITUTES PREFERRED TO TEACH AT A GIVEN TIME**

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Number of Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>One day</td>
</tr>
<tr>
<td>19</td>
<td>Two days</td>
</tr>
<tr>
<td>21</td>
<td>Three days</td>
</tr>
<tr>
<td>2</td>
<td>Four days</td>
</tr>
<tr>
<td>13</td>
<td>Five days</td>
</tr>
<tr>
<td>15</td>
<td>Any number requested by school</td>
</tr>
</tbody>
</table>

The response to Question 14, **Do most of the teachers for whom you substitute usually leave adequate lesson plans?** was different from that which prevailed in a good deal of the literature about substitute teachers. The literature related that substitutes in some schools found poorly pre-
pared lesson plans. In Jackson, however, seventy-seven per cent stated that they usually found adequate lesson plans left for them; ten per cent replied that they usually found poor lesson plans; seven per cent were ambivalent in their replies; and six per cent did not respond to the question.

Question 15 asked: How might classroom teachers improve the lesson plans which they leave for substitute teachers? Basically, three concerns were given by substitute teachers: (1) regular classroom teachers need to include more specific information about assignments; (2) lesson plans should be placed where they can be easily found; and (3) a time schedule should be included with lesson plans. Table VI gives several suggestions for lesson plan improvement.

**TABLE VI**

SUGGESTIONS OF SUBSTITUTE TEACHERS OF HOW REGULAR CLASSROOM TEACHERS MIGHT IMPROVE THEIR LESSON PLANS

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>26</td>
<td>More specific assignments</td>
</tr>
<tr>
<td>17</td>
<td>Include a time schedule with lesson plans</td>
</tr>
<tr>
<td>8</td>
<td>Include board and seat work</td>
</tr>
<tr>
<td>6</td>
<td>List reading groups and books to be used</td>
</tr>
<tr>
<td>7</td>
<td>Place lesson plans where they can be easily found</td>
</tr>
<tr>
<td>6</td>
<td>Include extra work for students who are comparatively fast in completing regular assignments</td>
</tr>
</tbody>
</table>
The response of substitute teachers to question 16 was typical, generally, to that expressed in much of the literature about substitute teachers. Question 16 asked: Are there particular kinds of information about students that you wish classroom teachers would include with their lesson plans? As revealed in Table VII, most of the concerns about students were related to "problem children": how to provide for them; how to discipline them; and how to work with those with physical problems. Substitute teachers also expressed interest in knowing which children could be relied upon for help and leadership. Several, too, suggested that a seating chart be included with lesson plans.

**TABLE VII**

**PARTICULAR KINDS OF INFORMATION ABOUT STUDENTS THAT SUBSTITUTES WOULD LIKE INCLUDED IN LESSON PLANS**

<table>
<thead>
<tr>
<th>Number of Substitute Requests</th>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>Names of children who frequently misbehave in class</td>
</tr>
<tr>
<td>21</td>
<td>How to deal with children who misbehave</td>
</tr>
<tr>
<td>17</td>
<td>Names of children who are &quot;slow&quot; and/or disruptive in class</td>
</tr>
<tr>
<td>23</td>
<td>Names of student helpers and leaders</td>
</tr>
<tr>
<td>11</td>
<td>Seating charts</td>
</tr>
</tbody>
</table>

Question 17, What else might regular classroom teachers
do to make the job of substitute teaching more effective? revealed that some of our substitutes said that elementary children were not respectful enough of their efforts. They believed that the regular teacher could do more to prepare children to treat them as professional teachers. Another concern that received considerable attention was the need for regular teachers to include with their lesson plans some of the routine procedures that they perform on a daily basis: lunch, milk, and attendance duties, plus schedules of the times that art, gym, and music teachers would teach their children.

Question 18 asked: Have you refused substitute assignments in some elementary schools for reasons other than their distance from your home? Forty-three per cent replied "yes." Of this group, twenty-four per cent cited student discipline as the chief cause for assignment refusal. No other reply received enough response to warrant inclusion in this part of the study.

Some substitutes agreed to return to a particular school for assignment, but refused to teach in one or more classrooms within that school. Twenty-seven per cent of the substitutes replied "yes" to Question 19: Have you ever refused a substitute teaching assignment in a particular room(s) of a school, even though you accept teaching assignments in other rooms of the same school? The main reason given for such refusal was student discipline; ten per cent refused for this reason. No other reason for
refusal received enough response to warrant inclusion in this part of the paper.

Question 20, *Have you sometimes had extra-curricular duties to perform during the teaching day that you have disliked or found especially difficult to do?*, brought little response. Apparently, substitutes did not perceive this to be a problem.

Questions 21 and 22 again brought attention to this matter of *student discipline*, and the problems that substitute teachers encountered in their attempts to cope with it. Question 21 asked: *Have you had one or more day's substitute work in one of the elementary schools of this district in which the majority of children come from "culturally deprived" homes?* In reply, seventy-one per cent said "yes," twenty-eight per cent, "no." Question 22, subsequently related to Question 21, asked: *If your answer is "yes" to Question 21, what student problems, if any, have you encountered in these schools?* "Lack of school discipline" was given by twenty-nine per cent of those who replied "yes" to this question; "lack of respect for others" was given by twenty-seven per cent of those who replied "yes" to this question; "lack of interest in school" was given by nineteen per cent of this same group; and "resent authority" was given by fourteen per cent. Table VIII provides a breakdown of the replies given to this question by substitutes.
TABLE VIII

STUDENT PROBLEMS ENCOUNTERED BY SUBSTITUTES WHO HAVE WORKED IN "CULTURALLY DEPRIVED" SCHOOLS

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Problem Encountered</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Lack of self discipline</td>
</tr>
<tr>
<td>16</td>
<td>Lack of respect for others</td>
</tr>
<tr>
<td>11</td>
<td>Lack of interest in school</td>
</tr>
<tr>
<td>8</td>
<td>Resent authority</td>
</tr>
<tr>
<td>6</td>
<td>Short attention span</td>
</tr>
</tbody>
</table>

At this point in the questionnaire, substitute teachers were given an opportunity to propose suggestions they might have to improve some of their working conditions. Question 23 asked: **In your opinion, could anything be done to make the job of substitute teacher more effective in the schools with a majority of children from "culturally deprived" homes?** In reply, fifty-two per cent said "yes;" and seventeen per cent, "no;" thirty-one per cent did not respond to the question. In general, suggestions made by this fifty-two per cent were not new. A small number suggested that the principal must support the substitute in his disciplinary methods, if classroom order is to be achieved; also, a small number suggested that substitutes should be given a directive of disciplinary measures which they could implement in the classroom. As the reader can perceive, substitute teachers believed that measures should be taken.
to bring about good classroom discipline. But they provided little information as to how this might be done. Perhaps this matter of school discipline was more of a concern for school administrators than it was for substitute teachers. Nevertheless, it was substitute teachers who experienced disciplinary problems, and such experience sometimes can be efficacious in bringing about change on the part of those directly involved with the problem.

Question 24, What disciplinary measures do you believe that substitute teachers should be permitted to use with children who misbehave in the classroom? revealed that substitute teachers primarily perceived of discipline in terms of student exclusion from the classroom. Substitutes tended to believe that the principal’s office was the best place for children to be sent when their behavior was too disruptive for them to remain in the classroom. Substitutes also believed that they should be permitted to use the same disciplinary measures as those permitted for regular teachers.

Question 25 asked: Have you received adequate assistance from school principals with disciplinary problems that occurred in your classroom? In reply, eighty-nine per cent said “yes”; two per cent said “no”; and two per cent did not respond to the question. This affirmative response for elementary principals again said much for the cooperation given by school administrators to substi-
tute teachers. This writer and his readers might presume, then, that when a number of substitutes refused assignments in particular schools, or in particular rooms of schools, they did so not because of disappointment with administrative support, but because they could not withstand the classroom milieu that confronted them.

Question 26 is subsequently related to Question 25: What do you believe a school principal could do to help substitute teachers become more effective in the classroom? Response averaged ten per cent for each of the following replies: (1) the principal should support the substitute in his discipline; (2) the principal should inform each class at the beginning of each school day of the behavioral expectations held by him and the regular teacher for the substitute; (3) the principal should discipline problem students; and (4) the principal should stop into the classroom at intervals, to bolster the morale of the substitute as well as make it known to students that he is vitally interested in the support that they give to him.

Question 27 brought the matter of wages to bear, as a means of interesting more people in substitute work. Question 27 asked: What could the Jackson Public Schools do to recruit more substitute teachers for schools of the "culturally deprived"? In reply, thirty-two per cent stated that increased wages would be helpful. Three
other responses were at the five per cent level: in-service education for substitutes; smaller class loads in the "culturally deprived" schools; and, again, this matter of the principal's disciplinary support for the substitute.

Question 28 brought the same kind and degree of response as did Question 27, except that "friendliness of the principal" replaced "smaller class size" as a concern of substitute teachers.

The next question brought more divided response from substitutes than any other question. Question 29 asked: Do you believe that substitute teachers in the elementary schools of this district are adequately paid for their work? In reply, forty-five per cent said "yes," forty-six per cent "no"; one per cent said that "it depends upon where a substitute works"; and eight per cent did not respond to the question. General response to this question elicited greater support for increased wages than previously indicated in Question 27. It may be assumed that Question 29 may have focused attention on wages for substitute teachers, thereby triggering increased interest in the question.

But Question 30 did not support the concept of additional remuneration for those who worked in "culturally deprived" schools, currently held by some educators throughout the country. Question 30 asked: Do you believe that those who substitute in schools with children from
"culturally deprived" homes should be paid more money for a day's work than those who substitute in "middle class" schools? In reply, thirty-one per cent said "yes," fifty-eight per cent, "no." One per cent answered "sometimes," one per cent "not sure," and nine per cent did not respond to the question. Of the fifty-eight per cent who replied "no" to Question 30, seventeen per cent maintained that "all schools have real problems of one kind or other"; and nine per cent replied "only if regular classroom teachers receive more money for working in 'culturally deprived' schools." Knowing some of the problems that Jackson principals have experienced with substitute teachers in "culturally deprived" schools, and knowing how some substitutes had contrasted the experiences of "culturally deprived" with "suburban schools," this writer suspects that the concept of differential pay for persons of the same job classification is a concept unrelated to their past experience, and consequently may be something to reject until more is known about it. Of the thirty-one per cent who replied "yes" to Question 30, almost half, or forty-five per cent, said that "teachers work harder in culturally deprived areas."

Orientation workshops for substitute teachers were evidently untried in Jackson; ninety-eight per cent replied "no" to Question 31: Have you ever attended an orientation workshop for substitute teachers? No one
answered "yes" for this question; two per cent did not respond to it. Jackson substitutes, however, had some definite ideas about what should be taught in orientation workshops. Their suggestions were provided in response to question 32: If the Jackson Public Schools were to sponsor orientation workshops for persons new to substitute teaching, what should be taught in such a program? Table IX provides a list of their concerns. It is enough to say, that school discipline and school rules and regulations were two major concerns.

### Table IX

**Suggestions from Experienced Substitute Teachers of What Should Be Discussed with New Substitute Teachers in Orientation Workshops**

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>Disciplinary measures</td>
</tr>
<tr>
<td>20</td>
<td>Rules, regulations, duties</td>
</tr>
<tr>
<td>13</td>
<td>Grade level books and materials</td>
</tr>
<tr>
<td>11</td>
<td>Instructional aids and seat work</td>
</tr>
</tbody>
</table>

Substitute teachers of this city expressed a willingness to attend inservice workshops, if they were developed for them. Question 33 asked: If the Jackson Public Schools were to sponsor inservice training workshops for experienced substitute teachers - workshops for which they re-
ceived pay—would you attend? In reply, seventy-three per cent answered “yes,” fourteen per cent “no”; five per cent were “undecided,” and eight per cent failed to respond to the question.

Question 34 asked the same question as question 33, except that wages would not be paid for workshop attendance: *If funds would be unavailable to pay teachers to attend such inservice workshops, but you could perceive the advantages of participation, would you attend?* In reply, sixty-seven per cent said “yes,” eighteen per cent “no”; fifteen per cent did not respond to the question. Of the eighteen per cent who replied “no,” there might have been some who would not have benefited from attendance at workshops without pay. Persons close to retirement and those who would have to pay someone to care for their children while they attended such a workshop are examples of this.

Question 35, the last question of the questionnaire for substitute teachers asked: *If you replied “yes” to question 34, what would you hope to gain from such workshops?* Table X provides an account of those replies most frequently included in the questionnaire. How to cope with student discipline received the greatest support from substitute teachers.
### TABLE X

**WHAT EXPERIENCED SUBSTITUTES WOULD HOPE TO GAIN FROM THEIR ATTENDANCE AT INSERVICE WORKSHOPS**

<table>
<thead>
<tr>
<th>Number of Substitutes</th>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>New methods, skills, procedures</td>
</tr>
<tr>
<td>8</td>
<td>Interact with regular classroom teachers</td>
</tr>
<tr>
<td>17</td>
<td>How to cope with disciplinary situations</td>
</tr>
<tr>
<td>6</td>
<td>Routine duties, procedures, practices, policies</td>
</tr>
<tr>
<td>6</td>
<td>&quot;New math&quot;/reading</td>
</tr>
<tr>
<td>6</td>
<td>Grade level books and materials</td>
</tr>
</tbody>
</table>

The following suggestions came to this writer while doing this study. Although these suggestions were made by but one-to-four persons, this writer deemed them worthy of being included in this paper by virtue of their novelty or ingeniousness.

In response to question 12 - the question about whether or not substitutes were made to feel welcome in schools - two persons replied that they had little contact with anyone but the school secretary. For the substitute who holds adult fellowship high in his motives for doing substitute teaching, school situations void of social contacts might serve to discourage him from working in such places in the future.

Question 20 - the question which asked if substitutes
had to perform extra duties that they disliked—brought
to light this matter of substitutes having to serve as a
physical education teacher as well as a classroom teacher.
Some substitutes became dissatisfied when placed in the
environmental setting of the gymnasium. A regular class­
room teacher, or school principal, should have left some
suggestions for simplified activities that could have been
implemented in such a situation. This was especially true
if the school had to employ inexperienced substitutes or
those who were oriented for a level of teaching other than
that in which they were substituting.

Question 23—could anything be done to make the
substitute teacher more effective in "culturally deprived"
schools?—brought this response from one substitute: he
suggested that each school have its own group of substi­
tute teachers. If this were done, surmises this writer,
substitute teachers would then have more identity, since
they would have a home school from which to work. They
would not be dependent upon city-wide assignments for em­
ployment. This, too, might be a method of recruiting
regular classroom teachers; these employees might be prone
to accept regular classroom assignments in those schools
for which they have taught on a substitute basis. Another
respondent suggested that substitutes be assigned to one
or two schools only. It is this writer's opinion that as­
ignment of substitutes to two schools would be better than
to one school. A substitute might not get much work if limited to one school.

Question 27—what could Jackson schools do to recruit more substitutes for "culturally deprived" schools?—brought these three suggestions: (1) substitutes need more information of how to cope with "culturally deprived" children; (2) substitutes need time to visit those schools that they have never been to, in order to acquaint themselves with the regular teachers and the layout of the buildings; (3) temporary assignment of teacher aides to classrooms taught by substitutes could be an invaluable assistance to them.

In reply to Question 30—should substitutes who work in "culturally deprived" areas be paid more than those who teach in "middle class" areas?—one substitute suggested that this innovation might attract more substitutes for substitute work in "culturally deprived" schools. In talking with principals of "culturally deprived" schools, this writer found that the upper grades are the ones that gave substitutes difficulty; substitutes could generally cope with the problems of the primary children. But the disciplinary problems they encountered in some upper-grade classrooms sometimes discouraged them from accepting future assignments with this age group.

The secretary who contacts substitute teachers for the Jackson schools told this writer that older female substitutes tend to refuse upper grade assignments in all
types of elementary schools. Moreover, girls just out of college, she said, are sometimes eager to volunteer for upper grade assignments for the very first time, but frequently refuse additional, upper-grade assignments after experiencing a classroom filled with active boys. Young, male substitutes, she added, frequently refuse assignments on the elementary school level. They prefer junior and senior high assignments.

Lastly, her conversations with substitute teachers reiterated a concept previously mentioned in this study; an understanding, supportive principal can do much to encourage substitute teachers to return to his school for future assignments.

Table XI summarizes the reasons for shortages of substitute teachers that existed in the Jackson elementary schools during the 1967-68 school year.

TABLE XI

SUMMARY OF REASONS FOR SHORTAGES OF SUBSTITUTE TEACHERS IN THE JACKSON PUBLIC SCHOOLS DURING 1967-68

1. Some substitutes would not accept assignments in schools that were not relatively close to their homes.

2. Some substitutes accepted assignments only in their neighborhood school.

3. Some substitutes refused assignments in classrooms in which there were known to be comparatively many disciplinary problems.
4. Some substitutes would not accept upper-grade assignments because they perceived of the children in these grades to be disciplinary problems.

5. Widespread illness among substitute teachers at the time they were needed.

6. Some substitutes accepted assignments in only those schools in which they had developed friendships over the years with members of the building staffs.

7. Unusually great demand for substitute teachers when two circumstances simultaneously occurred: several teachers were absent from their classrooms because of attendance at professional workshops, and several teachers were absent because of illness.

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Questionnaire Given to Personnel Directors

The personnel directors who participated in this study during the 1967-68 school year employed several techniques for recruiting and retaining substitute teachers. They encouraged people to pursue college in order to qualify for certification. They encouraged people to obtain temporary certification so that they could meet teaching standards. Personnel directors also encouraged retirees to substitute teach, especially in those schools from which they had retired as regular classroom teachers.

Some personnel directors were fortunate to have particular employment incentives for substitute teachers in
their school districts. The majority of the school districts in which these personnel directors were employed paid higher wages to substitutes than the surrounding districts. Moreover, thirty-nine per cent of these school districts provided orientation programs for new substitute teachers. Eighteen per cent of the personnel directors reported that their school districts had provided an inservice education program for experienced substitute teachers. Table XII indicates the efforts made by personnel directors to recruit and retain substitute teachers.

**TABLE XII**

**EFFORTS MADE BY TWENTY-EIGHT SCHOOL DISTRICTS TO RECRUIT AND RETAIN PEOPLE FOR SUBSTITUTE TEACHING**

<table>
<thead>
<tr>
<th>Question</th>
<th>Per Cent</th>
<th>Per Cent</th>
<th>No Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did your school district encourage people with bachelors degrees to get temporary certification so that they could qualify for substitute teaching?</td>
<td>79</td>
<td>18</td>
<td>3</td>
</tr>
<tr>
<td>Did your school district make some effort to encourage retirees to substitute teach?</td>
<td>57</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>Did your elementary principals encourage substitute teachers to remain active in their respective schools?</td>
<td>75</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>

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TABLE XII (cont.)

<table>
<thead>
<tr>
<th>Question</th>
<th>Per Cent Per Cent</th>
<th>No Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Were the daily wages for substitute teachers equal to or better than those paid to substitutes who worked in surrounding school districts?</td>
<td>79 18</td>
<td>3</td>
</tr>
<tr>
<td>Did your school district actively encourage substitute teachers to return to college for more education?</td>
<td>64 36</td>
<td></td>
</tr>
<tr>
<td>Did your school district have an orientation program for people who planned to become substitute teachers?</td>
<td>39 61</td>
<td></td>
</tr>
<tr>
<td>Did your school district have an inservice program for experienced substitute teachers?</td>
<td>18 82</td>
<td></td>
</tr>
</tbody>
</table>

Substitute teachers provided information about working conditions in those schools in which they taught. Approximately twenty per cent stated that they enjoyed working with children. Another twenty-one per cent reported that they liked working in those schools for which they were frequently called to teach. Still another twenty-one per cent reported that the proximity of the schools to their homes greatly influenced their decision in choosing particular schools for substitute work. Table XIII provides the reader with information about the concerns that substitute teachers considered when choosing schools for their
TABLE XIII

MAJOR COMMENTS OF SUBSTITUTE TEACHERS
ABOUT WORKING CONDITIONS AS REPORTED
BY THEM TO PERSONNEL DIRECTORS

<table>
<thead>
<tr>
<th>Major Comments</th>
<th>Per Cent of Personnel Directors Who Were Informed of Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enjoyed teaching children</td>
<td>21</td>
</tr>
<tr>
<td>The frequency with which they were called for assignment</td>
<td>21</td>
</tr>
<tr>
<td>Proximity of school to substitutes' homes</td>
<td>21</td>
</tr>
</tbody>
</table>

On those days when substitute teachers could not be obtained, some school districts found it necessary to employ emergency measures. Principals sometimes taught classes. In some instances principals placed students without substitute teachers in classrooms that did have teachers. In other situations principals sent students home when substitute teachers could not be found. Table XIV provides a breakdown of the school districts that applied the aforementioned measures on one or more occasions.

Substitute teachers expressed some of their dissatisfactions with substitute teaching to personnel directors. Poorly constructed lesson plans left for them by regular classroom teachers was a complaint mentioned by twenty-one
per cent of the substitute teachers. Another twenty-one per cent expressed dissatisfaction with the disciplinary problems that confronted them in some of the "inner city" schools. Fourteen per cent stated that they had experienced disciplinary problems in elementary schools in areas which were not necessarily "culturally deprived" areas. Another fourteen per cent stated that they were reluctant to accept substitute positions in schools located relatively far from their homes, especially those schools that could not be reached by means of city transportation facilities. Persons who did not drive or who disliked driving a car were the ones who emphasized this dissatisfaction. Table XV furnishes the reader with a summary of these dissipations and the per cent of substitute teachers who expressed them.

TABLE XIV

EMERGENCY MEASURES EMPLOYED BY SOME OF THE SCHOOL DISTRICTS IN THIS STUDY WHEN SUBSTITUTE TEACHERS COULD NOT BE OBTAINED

<table>
<thead>
<tr>
<th>Emergency Measure</th>
<th>Per Cent of Districts That Employed Emergency Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal taught class</td>
<td>32</td>
</tr>
<tr>
<td>Principal divided students without a teacher among other teachers</td>
<td>25</td>
</tr>
<tr>
<td>Principal sent walking students home and divided bus riders among other teachers</td>
<td>18</td>
</tr>
</tbody>
</table>
TABLE XV
DISSATISFACTIONS EXPRESSED ABOUT SUBSTITUTE TEACHING BY SUBSTITUTE TEACHERS TO PERSONNEL DIRECTORS

<table>
<thead>
<tr>
<th>Dissatisfaction</th>
<th>Per Cent of Personnel Directors Who Were Informed of Dissatisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor lesson plans</td>
<td>21</td>
</tr>
<tr>
<td>Many disciplinary problems in some schools</td>
<td>14</td>
</tr>
<tr>
<td>&quot;Inner-city&quot; classrooms with acute disciplinary problems</td>
<td>21</td>
</tr>
<tr>
<td>Schools not located on city transportation lines</td>
<td>14</td>
</tr>
</tbody>
</table>

Over half of the personnel directors replied that their school districts requested principals to submit periodic evaluations to their office about the teaching effectiveness of substitute teachers. However, twenty-five per cent reported that the substitute teachers' ability to meet minimal certification requirements was the chief standard which they employed. The majority of the personnel directors, however, indicated that unsatisfactory reports from principals about the teaching effectiveness of particular substitute teachers usually removed them from the substitute list in those schools where the complaints were made.
Questionnaire Given to Elementary Principals

Forty per cent of the elementary principals responded that they had recruited substitute teachers for their own schools. They stated that they had especially tried to recruit qualified people from their respective school communities for substitute teaching. However, fifty-four per cent of these principals stated that they did not actively encourage substitute teachers to favor their schools over other Jackson elementary schools.

Jackson principals reported that personal contact between elementary principals and prospective substitute teachers was an important method of recruitment. Moreover, school principals reported that parents could be helpful in supplying information to them about persons who might become substitute teachers if they were approached about such employment.

Principals stated that civic organizations may be of help, too, in recruiting persons for substitute teaching. They listed the P.T.A. and Association of American University Women as examples of such organizations. Retired teachers were also listed as a good source of substitute teachers. Also, the local newspaper was given as a source that had assisted school administrators in obtaining substitute teachers.

Fifty per cent of the Jackson principals reported
that on one or more occasions they had to teach a classroom because a substitute teacher was unavailable, and another twenty-five per cent reported that on one or more occasions they had sent children home because a substitute teacher was unavailable.

Only twenty per cent of the principals stated that they had difficulty getting substitute teachers for more than one or two consecutive days at a time. Forty-three per cent of the principals replied that they had difficulty finding substitutes for certain grade levels. Grades five and six were the difficult grades for which to provide substitute teachers. Table XVI provides the reader with information about recruitment practices implemented in Jackson, Michigan, during 1967-68.

TABLE XVI

RECRUITMENT SITUATIONS CONCERNING SUBSTITUTE TEACHERS THAT JACKSON PRINCIPALS EXPERIENCED DURING THE 1967-68 SCHOOL YEAR

<table>
<thead>
<tr>
<th>Recruitment Practice</th>
<th>Per Cent of Support from Principals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruited substitute teachers</td>
<td>40</td>
</tr>
<tr>
<td>Encouraged substitute teachers to favor their schools over others when accepting assignments</td>
<td>35</td>
</tr>
<tr>
<td>Had difficulty recruiting substitutes for more than one or two consecutive days</td>
<td>20</td>
</tr>
<tr>
<td>Had difficulty obtaining substitutes for certain grade levels</td>
<td>30</td>
</tr>
</tbody>
</table>
Principals stated that much could be done on a school district basis to encourage substitute teachers to more readily accept substitute assignments in schools of the "culturally underprivileged." Thirty per cent believed that a better code of discipline might help the substitute to enforce better classroom discipline. Thirty five per cent stated that the school district should educate a group of substitutes to work especially in those schools with large numbers of "culturally deprived" children.

All of the principals stated that their teachers made a special effort to socialize with substitute teachers during those times of the day when they did not have students to teach. Fifty per cent of the principals reported that their teachers invited substitutes to the teachers' lounge for coffee during recess times and invited them to go to lunch with them.

Principals were asked what they believed to be the most important teaching qualifications needed by the substitute teachers who worked in their schools. Table XVII lists these qualifications. Principals responded that the ability of substitutes to adapt to various teaching situations was of greatest importance to them. The ability to control children, plus a liking for children, were of next importance in their judgment, followed by knowledge of school curriculum and teaching techniques.
<table>
<thead>
<tr>
<th>Teaching Competencies</th>
<th>Per Cent of Principals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to adapt to teaching situations</td>
<td>40</td>
</tr>
<tr>
<td>A liking for children</td>
<td>35</td>
</tr>
<tr>
<td>Ability to maintain classroom discipline</td>
<td>35</td>
</tr>
<tr>
<td>Knowledge of curriculum</td>
<td>30</td>
</tr>
<tr>
<td>Knowledge of teaching techniques</td>
<td>25</td>
</tr>
<tr>
<td>Knowledge of child development</td>
<td>20</td>
</tr>
</tbody>
</table>

Nineteen of the twenty principals who participated in the study reported that they had had disciplinary problems in the classroom when a substitute teacher was in charge. But eighty per cent of these principals stated that the substitutes who had worked in their schools had generally used acceptable methods of coping with their disciplinary situations. However, lack of knowledge about appropriate disciplinary techniques, applied to a broad range of disciplinary situations, was reported by twenty-five per cent of these principals to be the chief problem for classroom teaching reflected in the work of substitute teachers.
Table XVIII indicates how Jackson principals attempted to assist substitute teachers in coping with disciplinary problems.

**TABLE XVIII**

WAYS IN WHICH JACKSON PRINCIPALS ATTEMPTED TO ASSIST SUBSTITUTE TEACHERS COPE WITH DISCIPLINARY SITUATIONS

<table>
<thead>
<tr>
<th>Kinds of Help They Gave to Substitutes</th>
<th>Per Cent of Principals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informed children of behavioral standards expected of them</td>
<td>50</td>
</tr>
<tr>
<td>Excluded recalcitrant children from the classroom</td>
<td>45</td>
</tr>
<tr>
<td>Temporarily took over the class to restore disciplinary control</td>
<td>20</td>
</tr>
<tr>
<td>Arranged for private conference with substitute to discuss problem</td>
<td>20</td>
</tr>
</tbody>
</table>

Twenty-five per cent of the substitute teachers expressed dissatisfactions with the teaching conditions that they found in the schools in which they taught during the 1967-68 school year. Some were dissatisfied with the lesson plans that regular classroom teachers left for them. Others complained of the lack of information about individual students. Still others reported that some classrooms contained comparatively large numbers of children who caused disciplinary problems, and who consequently made classroom
teaching difficult. Table XIX indicates the kinds of dissatisfactions expressed by these substitute teachers.

**TABLE XIX**

**DISSATISFACTIONS REPORTED TO PRINCIPALS BY SUBSTITUTE TEACHERS ABOUT TEACHING CONDITIONS FOUND IN THEIR SCHOOLS**

<table>
<thead>
<tr>
<th>Dissatisfactions</th>
<th>Per Cent of Principals Who Reported That Substitute Teachers Had Expressed Dissatisfactions To Them</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inadequate lesson plans</td>
<td>35</td>
</tr>
<tr>
<td>Lack of information about individual students</td>
<td>50</td>
</tr>
<tr>
<td>Too many children with disciplinary problems in some classrooms</td>
<td>25</td>
</tr>
</tbody>
</table>

Jackson elementary principals reported that professional growth education for substitute teachers is important for upgrading the quality of teaching done by them in the classroom. The principals stated that orientation workshops are important for substitutes who have had little or no classroom experience. Moreover, a large number of the principals stated that professional growth experiences in the form of inservice workshops are important for upgrading the instructional competence of substitute teachers who have had previous classroom experience. Principals expressed particular interest in providing substitute teachers.
with workshop experiences about textbooks, curriculum outlines, and trends in elementary education.

Jackson principals stated that they believed the amount of formal education that substitute teachers have was not necessarily a good indicator of how well they performed in the classroom. Principals were in complete agreement on this point. Table XX presents the beliefs of Jackson principals about the importance of professional growth experiences in upgrading substitute teacher competence for classroom instruction.

**TABLE XX**

**PRINCIPALS' BELIEFS ABOUT PROFESSIONAL GROWTH EXPERIENCES FOR SUBSTITUTE TEACHERS**

<table>
<thead>
<tr>
<th>Belief About Professional Growth Experiences</th>
<th>Per Cent of Principals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extent of formal education has little effect upon classroom competence of substitute teachers</td>
<td>100</td>
</tr>
<tr>
<td>Inexperienced substitute teachers could benefit from participation in an orientation workshop</td>
<td>100</td>
</tr>
<tr>
<td>Experienced substitute teachers could benefit from participation in an in-service workshop</td>
<td>80</td>
</tr>
</tbody>
</table>

Questionnaire Given to Regular Classroom Teachers

Elementary classroom teachers in Jackson, Michigan
replied that they believed that the best way to recruit substitute teachers was to talk to people personally about this type of work. Moreover, they stated that regular classroom teachers should make recommendations to school administrators about people whom they believe to be worthwhile candidates for such employment. Table XXI illustrates how classroom teachers stated that substitute teachers should be recruited. Only four per cent of the teachers who completed the questionnaire indicated that they believed school principals should assist the school district in the recruitment of substitute teachers. These teachers perceived of the principal’s role as one of contacting those people who they recommend to them.

### TABLE XXI

REGULAR CLASSROOM TEACHERS’ SUGGESTIONS FOR RECRUITMENT OF SUBSTITUTE TEACHERS

<table>
<thead>
<tr>
<th>Classroom Teachers’ Suggestions</th>
<th>Per Cent of Teachers Who Supported Particular Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>The daily wages of substitute teachers should be increased</td>
<td>6</td>
</tr>
<tr>
<td>Teachers and principals should actively encourage people to be substitute teachers</td>
<td>22</td>
</tr>
<tr>
<td>Principals and teachers should make recommendations to the school district of people whom they believe would be capable substitute teachers</td>
<td>15</td>
</tr>
</tbody>
</table>
A comparatively small percentage of these teachers also recommended that substitute teachers be paid more money for their work. Also, a small percentage suggested that the school district should advertise for substitute teachers in the local newspaper much more than is presently done.

Thirty-eight per cent of the classroom teachers indicated that they would be willing to serve as members of an orientation workshop staff for new substitute teachers. However, only twenty-two per cent indicated that they would be willing to serve as members of an inservice workshop staff for experienced substitute teachers. Tables XXII and XXIII, respectively, present the reader with classroom teachers' suggestions for providing new and experienced substitute teachers with professional growth experiences.

### TABLE XXI (cont.)

<table>
<thead>
<tr>
<th>Classroom Teachers' Suggestions</th>
<th>Per Cent of Teachers Who Supported Particular Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>School principals should actively recruit those people whom classroom teachers recommend</td>
<td>4</td>
</tr>
<tr>
<td>The school district should make more use of the local newspaper to recruit candidates for substitute teaching</td>
<td>4</td>
</tr>
</tbody>
</table>
### TABLE XXII

**REGULAR CLASSROOM TEACHERS' SUGGESTIONS OF EDUCATIONAL EXPERIENCES THAT COULD BE PROVIDED NEW SUBSTITUTE TEACHERS IN AN ORIENTATION WORKSHOP**

<table>
<thead>
<tr>
<th>Suggestions for Workshop Experiences</th>
<th>Per Cent of Classroom Teachers Who Supported Particular Orientation Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction in disciplinary techniques</td>
<td>24</td>
</tr>
<tr>
<td>Familiarization with grade level materials</td>
<td>16</td>
</tr>
<tr>
<td>Suggestions of how to improvise in classroom instruction</td>
<td>15</td>
</tr>
<tr>
<td>Orientation to general school routines, rules, and regulations</td>
<td>12</td>
</tr>
<tr>
<td>Instruction in mathematics</td>
<td>9</td>
</tr>
<tr>
<td>Instruction in pupil attendance procedures</td>
<td>7</td>
</tr>
</tbody>
</table>

### TABLE XXIII

**REGULAR CLASSROOM TEACHERS' SUGGESTIONS OF EDUCATIONAL EXPERIENCES THAT COULD BE PROVIDED EXPERIENCED SUBSTITUTE TEACHERS IN AN INSERVICE WORKSHOP**

<table>
<thead>
<tr>
<th>Suggestions for Workshop Experiences</th>
<th>Per Cent of Classroom Teachers Who Supported Particular Inservice Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction in disciplinary techniques</td>
<td>9</td>
</tr>
</tbody>
</table>
TABLE XXXIII (cont.)

<table>
<thead>
<tr>
<th>Suggestions for Workshop Experiences</th>
<th>Per Cent of Classroom Teachers Who Supported Particular Inservice Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction in mathematics</td>
<td>8</td>
</tr>
<tr>
<td>Observation in classrooms</td>
<td>6</td>
</tr>
<tr>
<td>Familiarization with audio-visual materials</td>
<td>5</td>
</tr>
</tbody>
</table>

There are particular kinds of information that regular classroom teachers indicated should be provided by them for substitute teachers. Some stated that it would be most helpful to provide substitute teachers with a list of the names of the most responsible students. Others maintained that a list of the names of children with particular emotional, physical, or health problems could be beneficial for substitute teachers. Still others related that inadequate lesson plans can cause substitute teachers real difficulty. When lesson plans are thorough, substitute teachers are better able to cope with various types of teaching situations. Table XXIV indicates the chief problems that confronted substitute teachers in classrooms, as perceived by regular elementary classroom teachers.
TABLE XXIV

REGULAR TEACHERS' BELIEFS OF THE BASIC PROBLEMS THAT SOME SUBSTITUTE TEACHERS EXPERIENCED IN CLASSROOMS

<table>
<thead>
<tr>
<th>Problems that They Believed Confronted Substitute Teachers</th>
<th>Per Cent of Regular Classroom Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inadequate lesson plans</td>
<td>18</td>
</tr>
<tr>
<td>Uncooperative students</td>
<td>13</td>
</tr>
<tr>
<td>No lesson plans</td>
<td>6</td>
</tr>
<tr>
<td>Little or no information about school routines and procedures</td>
<td>6</td>
</tr>
</tbody>
</table>

Regular classroom teachers had some definite beliefs about the kinds of instructional tasks that some substitute teachers had difficulty performing in the classroom. Generally, they believed that substitutes should not be given the responsibility of introducing new concepts and new units of work to children. Some regular teachers avoided giving substitute teachers the responsibility of introducing "new math" concepts to children. Table XXV indicates those tasks which some regular classroom teachers believed should not be assigned to substitutes.
TABLE XXV
INSTRUCTIONAL TASKS WHICH SOME CLASSROOM TEACHERS AVOIDED ASSIGNING TO SUBSTITUTE TEACHERS

<table>
<thead>
<tr>
<th>Task Avoidance</th>
<th>Per Cent of Regular Classroom Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>New instructional concepts</td>
<td>19</td>
</tr>
<tr>
<td>New teaching units</td>
<td>11</td>
</tr>
<tr>
<td>&quot;New math&quot;</td>
<td>12</td>
</tr>
<tr>
<td>Group work on projects</td>
<td>10</td>
</tr>
<tr>
<td>Art work</td>
<td>10</td>
</tr>
</tbody>
</table>

In general, regular classroom teachers in Jackson, Michigan expressed comparatively little dissatisfaction about the work that substitute teachers did for them in the classroom. The chief complaint, expressed by twenty-five per cent of the regular teachers, was that some substitutes did not leave a record at the close of the day of (1) how well the student body progressed with class assignments and (2) student problems, if any, that occurred during the day. Another eleven per cent expressed dissatisfaction with those substitutes who had failed to follow the lesson plans. Still another six per cent indicated that some substitutes did not correct all of the papers that had resulted from assignments they had given to students.
Cross-Sectional Comparison of Responses to Some of the Related Questions Found in Two or More of the Four Questionnaires

Elementary principals of Jackson, Michigan, schools and the personnel directors of Michigan schools who participated in this study generally agreed in response to similar questions about substitute teacher shortages: seventy-five per cent of the principals declared that on one or more occasions they had experienced instances during 1967-68 when they could not obtain substitute teachers for one or more of their classrooms; seventy-seven per cent of the personnel directors also reported that schools within their respective school districts had experienced substitute teacher shortages on one or more occasions.

Thirty per cent of the Jackson elementary principals replied that they had experienced some difficulty in obtaining substitute teachers for particular grades. Thirty-seven per cent of the substitutes replied that they did not accept assignments in all grades.

Jackson principals unanimously agreed that substitute teachers who have had little or no classroom experience should be required to attend an orientation workshop. Twenty-five per cent of the personnel directors reported that their school districts had some type of orientation session for people who planned to become substitute teachers. The Jackson elementary substitutes reported that none of them
had ever attended an orientation workshop.

Of the substitute teachers who participated in this study, twenty-five per cent listed school discipline as the topic that would be most beneficial to new substitute teachers at an orientation workshop. Also, twenty-five per cent of the regular classroom teachers perceived of school discipline as the most important topic from which new substitute teachers would benefit.

Approximately twenty-five per cent of the experienced substitutes listed knowledge about rules, regulations, and duties as the second most important orientation topic from which new substitutes would benefit, whereas only twelve per cent of the regular classroom teachers listed rules, regulations, and duties to be the second most important topic for new substitutes. Twenty per cent of the principals stated that knowledge about rules, regulations, and duties to be of primary importance for new substitute teachers at orientation workshops. School principals listed school discipline as one of the next most important topics that could be presented at orientation workshops.

Substitute teachers listed knowledge about grade level books and materials to be third in importance as an orientation topic, whereas regular classroom teachers listed this category to be second in importance. School principals did not list this category to be of primary or secondary importance as an orientation topic.
The majority of the experienced substitute teachers reported that they would attend inservice education workshops to upgrade themselves professionally, whether or not they were paid for their attendance at these workshops. Seventy-three per cent of the substitutes replied that they would attend if paid to do so, and sixty-seven per cent replied that they would attend even if they were not paid. School discipline was the topic that received the most attention from substitutes as a topic for inservice education, with twenty per cent of them listing it first in their choice of educational priorities.

Eighty per cent of the principals indicated that they believed that the Jackson school district should provide inservice workshops for substitute teachers to upgrade their education. They, however, believed that these workshops should give primary attention to acquainting substitutes with trends in education, school curriculum, and text books.

Twenty-two per cent of the regular classroom teachers reported that they would be willing to serve as members of an inservice workshop team to educate substitute teachers. These teachers also stated that inservice workshops should give primary attention to acquainting substitutes with school curriculum, especially mathematics and reading methods and materials.

Some substitute teachers expressed dissatisfactions
with working conditions in the Jackson schools. Ten per cent were dissatisfied with the lesson plans that had been left for them by the regular classroom teachers. Seventy per cent of the principals stated that individual substitute teachers on one or more occasions had complained to them about regular teachers who left inadequate lesson plans. Twenty-five per cent of the regular classroom teachers, who themselves had been substitute teachers in the past, stated that inadequate lesson plans was also one of the chief problems that they had experienced as substitutes.

Forty-three per cent of the substitute teachers reported that they had refused substitute teaching assignments in some elementary schools for reasons other than distance from their homes. Fifty-six per cent of those who had refused assignments on one or more occasions stated that they did so because they had experienced disciplinary problems in schools. However, eighty-nine per cent of the substitute teachers reported that they had received adequate assistance from school principals with disciplinary problems that occurred in their classrooms. Twenty-five per cent of the principals stated that substitute teachers had informed them of their dissatisfaction with substitute assignments because of the disciplinary problems that they had experienced.

Fifty-two per cent of the substitute teachers stated that they preferred regular teachers who would include with their lesson plans information about problem children. Forty-seven per cent of the regular classroom teachers
agreed with substitute teachers in this matter, stating that they believed it would be particularly helpful for them to provide substitute teachers with the names of those students who might cause the substitute teacher disciplinary problems.

Principals unanimously agreed that their teaching staffs made a special effort to be friendly with substitute teachers at those times during the day when they were without students, e.g., recess and lunch-period sessions. However, fifty-four per cent of the substitute teachers stated that they perceived that the faculty members of some schools made them feel more welcome than the faculty members of other schools.
CHAPTER IV

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

The Problem

The purpose of this chapter will be to summarize the objectives of the study, the procedures followed in obtaining information, and the conclusions and recommendations related to the findings of the study.

Purposes for Which the Study Was Undertaken

There were three objectives for making this study: (1) to find ways of increasing the supply of substitute teachers through improved recruitment practices; (2) to study the feasibility of upgrading the education of inexperienced substitute teachers by means of their participation in professional growth activities; and (3) to encourage more substitute teachers to accept assignments in schools with large numbers of "culturally deprived" children.

A Review of the Procedures Used

In order to make a comprehensive study of the substitute teaching situation in the elementary schools of Jackson, Michigan, it was necessary to obtain information from four groups of people comparatively close to the
problems of substitute teaching: (1) substitute teachers, (2) principals, (3) regular classroom teachers, and (4) personnel directors. Information from these four groups was obtained by means of the questionnaire.

Four questionnaires were used to obtain information from the aforementioned four groups of respondents. Each questionnaire was designed to reflect the concerns of the group involved, i.e.: the questionnaire for substitute teachers attempted to examine the concerns of substitute teaching from their viewpoint; the questionnaire for principals attempted to examine their concerns about the problem; and the questionnaire given to regular classroom teachers and personnel directors attempted to do the same.

The types of questions included in this paper, found in the section entitled Development of the Instrument, added both strength and weakness to the study. The questions which partially or completely elicited sentence responses tended to bring out the chief concerns about substitute teaching from those who participated in this study. This was particularly true about the responses of substitute teachers. Had the questionnaire been constructed with only questions that elicited brief, check-type responses, it is doubtful whether their primary concerns about substitute teaching would have been revealed in their responses.

However, sentence-type responses proved to be difficult to assess. In some instances respondents would
contradict the replies that they had given to questions found elsewhere in the questionnaire. Some respondents seemed to adhere perseveringly to personal beliefs that they had about substitute teaching. These respondents tended to justify their logic by relating the questions to their beliefs, even though such relationships were, at times, illogical.

Another weakness that resulted from the questions that elicited sentence responses was the repetitious replies that were sometimes written. Some respondents reiterated what they had said elsewhere in the questionnaire. However, these repetitious replies had some merit, too. They revealed some of the salient beliefs about substitute teaching maintained by some respondents.

Tabular summaries of some of the responses for each of the four questionnaires were included in the research paper.

Only one of the four questionnaires sought information from respondents who resided outside of the City of Jackson. However, a review of the research about substitute teachers provided information from several school districts in Michigan and other states.

Following a report of the four questionnaires, a cross-sectional comparison was made of some of the responses found in two or more of them.
Conclusions

With seventy-five per cent of the elementary principals reporting that during the 1967-68 school year they had been unable to obtain substitute teachers on one or more occasions for one or more of their classrooms, the reader might assume that the demand for substitute teachers was greater than the potential number of people in the substitute teacher force. As indicated throughout parts of this research paper, no one factor solely contributed to this shortage of substitute teachers. Instead, a number of circumstances contributed to the shortage.

Some of the respondents in three of the four questionnaires maintained that the supply of substitute teachers would increase if substitute teachers were paid more money. However, some substitutes disagreed with this reasoning. They stated that they usually preferred to work in the county schools, where wages were generally lower than those paid in the Jackson Public Schools. These substitutes stated that while wages in the Jackson schools were generally higher than those paid to substitutes in the surrounding county schools, they were not high enough for them to withstand the problems of: (1) teaching students in some of the Jackson schools that had a proportionately large number of students with disciplinary problems, and (2) having to travel longer distances from their homes to the city schools.

Some of the principals and substitute teachers stated
that the problems of recruitment did not seriously exist in all Jackson schools, even though elementary principals stated that they had experienced one or more days in which they could not obtain substitute teachers. These principals and substitute teachers stated that the real problems of staffing schools with substitutes existed primarily in schools with large numbers of "culturally deprived" children. They subsequently stated that attention for recruitment and education of substitute teachers should be focused on these schools, since they were the ones who most frequently experienced substitute teacher shortages.

Shortages of substitute teachers most frequently occurred in the fourth, fifth, and sixth grades because more Jackson substitutes preferred kindergarten through third grades.

Upgrading the education of substitute teachers by means of their participation in professional growth workshops was a concept that received wide acceptance from substitute teachers, regular classroom teachers, and elementary principals. Principals proposed that attendance at these workshops be for all substitute teachers, regardless of their level of formal education. As indicated earlier in this paper, over fifty per cent of the substitute teachers stated that they would attend professional growth workshops, whether or not they were paid for their attendance. One-fourth of the regular classroom teachers stated that they would be
willing to accept teaching assignments in these workshops.

While both orientation workshops for new substitute teachers and inservice workshops for experienced substitute teachers were considered to be worthwhile by them, none reported that they had ever participated in such workshops at one time or other.

Regular classroom teachers reported that they were more willing to serve in an orientation workshop for new substitute teachers than they would be to serve in an inservice workshop for experienced substitute teachers; thirty-nine per cent stated that they would serve in an orientation workshop, whereas twenty-two per cent said they would serve in an inservice workshop.

The importance of being able to cope with disciplinary problems was of utmost concern to substitute teachers, regular classroom teachers, and principals. School discipline received more attention from these three groups than any other concern, in terms of what would be foremost in the content of professional growth workshops.

Recommendations

1. The Jackson Public Schools should consider establishing a substitute teacher committee to study further the recruitment and educational possibilities for maintaining a qualified substitute teacher force.
2. Consideration should be given by the school administration to the establishment of an internship program for new substitute teachers. The nature of such a program should be developed by a substitute teacher committee.

3. School administrators should explore the possibilities of establishing employment standards to assess levels of competency among substitute teachers.

4. The school system should study those school systems employing a differential pay scale for substitute teachers according to their qualifications for substitute teaching.

5. Substitutes who are available for substitute work in all schools throughout the school district should receive more pay than those who limit themselves to work in one or two schools.

6. Substitutes should be required to pledge themselves to a minimum number of days that they will be available for substitute teaching for the school district during the school year.

7. Principals should study the practicality of assigning one or more paraprofessionals to upper grade classrooms taught by substitute teachers.

8. The feasibility of establishing orientation and inservice workshops for substitute teachers should be studied as a means of upgrading their level of professional
competence. Moreover, special compensations might be considered for those substitutes who attend these workshops, e.g., pay for their workshop attendance, credit on the pay scale, and placement on a preferred calling list for classroom assignment.

9. Classroom teachers should have a responsible role in establishing standards for recruitment, professional growth education, and evaluation of the work of substitute teachers. The school district should utilize the services of those regular classroom teachers who would serve in professional growth workshops for substitute teachers.

10. School administrators should study the possibility of employing high school students to babysit for the children of substitute teachers and regular classroom teachers who participate in orientation or inservice workshops. Substitute teachers who teach during the regular school year would also benefit from this service.

11. The emphasis in the content of professional growth workshops should focus on the problems of the "culturally deprived" children, and the methods of working with this type of child in the classroom situation.
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APPENDIX A

QUESTIONNAIRE: BACKGROUND INFORMATION AND EXPERIENTIAL DATA ON SUBSTITUTE TEACHERS OF THE ELEMENTARY SCHOOLS OF THE JACKSON PUBLIC SCHOOLS

1. Did you accept substitute teaching assignments during the 1967-68 school year in elementary schools of the Jackson Public Schools?  ____ YES  ____ NO

2. Do you plan to do so again during 1968-69?  ____ YES  ____ NO

3. How many years have you served as an elementary substitute teacher in the Jackson Public Schools?

4. How many years of college had you completed before you became a substitute teacher in this school district?

5. How many college hours have you earned since becoming a substitute teacher?  ____ (Please indicate whether term or semester hours.)

6. What was your undergraduate major?

7. Did you first have some experience as a full-time classroom teacher before becoming a substitute teacher?  ____ YES  ____ NO

8. Have you done most of your substitute teaching in more than one elementary school in this district?  ____ YES  ____ NO

9. If you answered "yes" to Question 8: in which schools have you done most of your substitute teaching?

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10. Why have you chosen to teach in the above schools?

________________________________________________________________________

11. How many consecutive school days do you like to teach at a given time?  
   1 day  2 days  3 days  4 days  5 days. Other _________________________

________________________________________________________________________

12. Do the faculty members of some schools seem to welcome you as a substitute teacher more than others?  
   YES  NO  Please elaborate:

________________________________________________________________________

13. Do you substitute in both lower and upper elementary grades?  YES  NO  Please comment:

________________________________________________________________________

14. Do most of the teachers for whom you substitute usually leave adequate lesson plans?  YES  NO

15. How might some classroom teachers improve the lesson plans which they leave for substitute teachers?

________________________________________________________________________

16. Are there particular kinds of information about students that you wish classroom teachers would include with their lesson plans?

________________________________________________________________________

17. What else might regular classroom teachers do to make the job of substitute teaching more effective?

________________________________________________________________________

18. Have you refused substitute assignments in some elementary schools for reasons other than their distance from your home?  YES  NO  If your answer is "yes," please comment:

________________________________________________________________________
19. Have you ever refused a substitute teaching assignment in a particular room(s) of a school, even though you accept teaching assignments in other rooms of the same school? **YES** **NO** If you answered "yes," please elaborate:

20. Have you sometimes had extra-curricular duties to perform during the teaching day that you have disliked or found especially difficult to do? **YES** **NO** If "yes," please tell which duties were disliked:

21. Have you had one or more day's substitute work in one of the elementary schools of this district in which the majority of children come from "culturally deprived" homes? **YES** **NO**

22. If your answer is "yes" to Question 21, what student problems, if any, have you encountered in these schools?

23. In your opinion, could anything be done to make the job of substitute teacher more effective in these schools with a majority of children from "culturally deprived" homes? **YES** **NO** If "yes," please elaborate:

24. What disciplinary measures do you believe that substitute teachers should be permitted to use with children who misbehave in the classroom?

25. Have you received adequate assistance from school principals with disciplinary problems that occurred in your classroom? **YES** **NO**

26. What do you believe a school principal could do to help substitute teachers become more effective in the classroom?
27. What could the Jackson Public Schools do to recruit more substitute teachers for schools of the "culturally deprived?"

28. What could the Jackson Public Schools do to retain substitute teachers in these schools, once they have been recruited?

29. Do you believe that substitute teachers in the elementary schools of this district are adequately paid for their work? YES NO

30. Do you believe that those who substitute in schools with children from "culturally deprived" homes should be paid more money for a day's work than those who substitute in "middle class" schools? YES NO Please comment:

31. Have you ever attended an orientation workshop for substitute teachers? YES NO If you answered "yes," please describe the nature of this workshop:

32. If the Jackson Public Schools were to sponsor orientation workshops for persons new to substitute teaching, what should be taught in such a program:

33. If the Jackson Public Schools were to sponsor inservice training workshops for experienced substitute teachers - workshops for which they received pay - would you attend? YES NO

34. If funds would be unavailable to pay teachers to attend such inservice workshops, but you could perceive the advantages of participation, would you attend? YES NO
35. If you answered "yes" to question 34, what would you hope to gain from such workshops? _____________________

______________________________

______________________________

William Sumner
3536 Timberlane
Jackson, Michigan
QUESTIONNAIRE: * A REPORT FROM PERSONNEL DIRECTORS ABOUT RECRUITMENT AND RETENTION PROCEDURES OF ELEMENTARY SUBSTITUTE TEACHERS

1. Does your school district have an orientation program for people who plan to become substitute teachers?  
   YES  NO

2. If so, briefly describe this orientation program:
   __________________________________________

3. If not, what might your school district do to orient new people who plan to become substitute teachers in your elementary schools?  
   __________________________________________

4. Does your school district encourage people with bachelor's degrees to get temporary certification so that they qualify for substitute teaching?  
   YES  NO  If you answered "yes" to this question, how does your district go about encouraging people to get temporary certification?  
   __________________________________________

5. What criteria does your district use in determining those capable of doing satisfactory teaching on a substitute basis?  
   __________________________________________

6. Has your school district made some effort to encourage retirees to substitute teach?  
   YES  NO  If "yes," please comment:  
   __________________________________________

7. Are there social organizations in your community that make an organized effort to recruit some of their membership for substitute teaching in your elementary  
   * School districts in areas with 25,000-up population
schools? __YES __NO Please comment: ____________________

8. Does your school district have inservice workshops for experienced substitute teachers? __YES __NO If "yes," please elaborate: ________________________________

9. Did any of the substitute teachers voice dissatisfactions with working conditions in your elementary schools during the 1967-68 school year? __YES __NO
10. If so, what were some of their common dissatisfactions?

11. Are the daily wages for substitute teachers equal to or better than those paid to substitutes in surrounding school districts? __YES __NO

12. In your opinion, are wages paid for substitute teaching the only major concern of those who work in this capacity in your school district? __YES __NO If you answered "no" for this question, what do you believe are among the major concerns of these employees?

13. Is there more difficulty obtaining substitute teachers for some schools than others? __YES __NO

14. If the answer to question 13 is "yes," please describe the elementary teaching situations for which you frequently have difficulty obtaining substitutes:

15. Do some of your elementary principals encourage substitute teachers to remain active in their respective schools? __YES __NO If "yes," what are some of the methods they employ to attract substitute teachers to their schools?
16. Does your school district actively encourage substitute teachers to return to college for more education? 
   YES  NO  If "yes," what means are employed to do this?

17. Does your school district experience difficulty in obtaining substitute teachers during certain times of the year, e.g., influenza epidemics, inclement weather, etc.?

18. At certain times of the year, has your school district had to resort to emergency measures in order that every classroom would have a substitute teacher? 
   YES  NO  If "yes," please elaborate:

19. Please estimate the per cent of turnover of elementary substitutes realized by your district for 1967-68 __________

20. Has the substitute pool increased in the last five years? 
   YES  NO  If "yes," please comment on why you believe this to be:

21. How large was your elementary substitute teaching force during 1967-68? 
   (number of potentials)

22. Has your district encountered problems in obtaining substitutes not heretofore mentioned in this questionnaire? 
   YES  NO  Please elaborate:

William Sumner
3536 Timberlane
Jackson, Michigan
APPENDIX C

QUESTIONNAIRE: TWENTY ELEMENTARY PRINCIPALS’ OPINIONS ABOUT RECRUITMENT AND RETENTION OF SUBSTITUTE TEACHERS IN THE JACKSON PUBLIC SCHOOLS

1. As school principal, do you recruit substitute teachers for your school? ___YES ___NO Please comment:

2. If you had the time to recruit substitute teachers, how would you go about it? _________________________________

3. Do you actively encourage certain substitute teachers to favor your school over others, when accepting teaching assignments? ___YES ___NO Please comment:

4. If you answered “yes” to question 3, how do you go about this? _________________________________

5. Do you make a special effort daily to visit those classrooms of your school staffed with substitute teachers? ___YES ___NO Please comment: _________________________________

6. Have you ever had control problems in the classroom when a substitute teacher was in charge? ___YES ___NO

7. If you answered “yes” to question 6, what are some of the ways that you have assisted a substitute teacher in coping with disciplinary problems? _________________________________

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8. To the best of your knowledge, do most substitute teachers who work in your building use disciplinary measures that are acceptable to you, your teachers, and parents? Please comment: ____________________

9. In your opinion, what are the most important teaching qualifications needed by the substitute teachers who work in your school? ________________________________

10. Does your regular teaching staff make a special effort to socialize with substitute teachers during playground and lunch period times? __YES __NO Please comment: ________________________________

11. Do you find it difficult to obtain substitute teachers for certain grade levels? __YES __NO Please comment: ________________________________

12. Do you find it difficult to get substitute teachers for more than 1 or 2 consecutive days at a time? __YES __NO Please elaborate: ________________________________

13. Do you expect substitute teachers to perform recess duty? __YES __NO

14. If you answered "yes" to question 13, do they express dislike of this duty? __YES __NO

15. Do substitute teachers ever complain to you about teachers who leave inadequate lesson plans? __YES __NO

16. Do substitute teachers ever express to you a need for more information about individual students, so that they might better cope with classroom situations that arise? __YES __NO Please comment: ________________________________

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17. What do you believe might be done on a school district basis to encourage substitute teachers to more readily accept substitute assignments in schools of the "culturally underprivileged?" _____________________________

18. During the 1967-68 school year, were there times when you could not obtain a substitute teacher for one of your classrooms? ____YES ____NO If you answered "yes," what did you do with this classroom(s) without a teacher? ________________________________

19. Did any of your substitute teachers voice particular dissatisfactions with teaching conditions in your school during the 1967-68 school year? ____YES ____NO If "yes," what were some of these common dissatisfactions?

20. Do you find that the amount of formal education that a substitute teacher has generally reflects the quality of teaching that he or she does in the classroom? ____YES ____NO

21. Do you believe that substitute teachers who have had little or no classroom experience should be required to attend an orientation workshop? ____YES ____NO
   Please comment: ____________________________________________

22. Do you believe that our school district should upgrade the education of experienced substitute teachers by providing an inservice educational program for them? ____YES ____NO

23. If you answered "yes" to question 22, what should be included in this program? _____________________________

24. Are there any particular teaching abilities that some substitute teachers lack that most regular classroom teachers have? ____YES ____NO Please elaborate: ______
25. Do you have a problem getting substitute teachers to return to your school in those classrooms where students are grouped in ways different from the self-contained teaching situation (i.e., non-graded, team teaching, etc.)?  YES  NO  Please comment: 

26. Are there any other concerns about substitute teachers that have not been brought out in this questionnaire?


APPENDIX D

QUESTIONNAIRE: OPINIONS OF 200 REGULAR ELEMENTARY TEACHERS ABOUT TEACHING EFFECTIVENESS OF SUBSTITUTE TEACHERS

1. Have most of the substitute teachers who have taught for you during your absences done a satisfactory job? YES NO

2. If you answered "no" to question 1, what are your chief complaints?

3. What sort of instructional tasks can most substitute teachers do best for you?

4. What sort of instructional tasks do most substitute teachers have difficulty doing for you?

5. What sort of instructional tasks should a regular classroom teacher generally avoid, when making lesson plans for the substitute teacher?

6. Do most substitute teachers carry out the lesson plans that you leave for them? YES NO Please elaborate:

7. Do most substitute teachers leave a record of the events of their teaching day, i.e., progress of class in lessons; student problems; parent conferences held; etc.? YES NO Please elaborate:

8. Would it be particularly helpful for the regular classroom teacher to provide the substitute teacher with a list
of the most responsible students?  ____YES  ____NO  Comments: ____________________________

9. Would it be particularly helpful for the regular classroom teacher to provide a list of those students who might cause the substitute teacher the most trouble?  ____YES  ____NO  Comments: ____________________________

10. Were you a substitute teacher at one time in your teaching career?  ____YES  ____NO

11. If you answered "yes" to question 10, what, other than money, were the personal satisfactions that you derived from such work? ____________________________

12. If you answered "yes" to question 10, what were the chief problems that you faced in the classroom? ____________________________

13. Do you believe that your school district does all it can to recruit substitute teachers?  ____YES  ____NO  Please comment: ____________________________

14. Do you believe that your principal and co-workers should assist your school district in the recruitment of substitute teachers?  ____YES  ____NO

15. If you answered "yes" to question 14, do you have suggestions of how this might be done? ____________________________

16. What might your school principal and co-workers do to "make substitutes feel at home," consequently encouraging them to want to do more substitute teaching in your building? ____________________________

17. If enough interest could be aroused in providing orientation workshops for persons new to substitute teaching, would you be willing to serve in a workshop?  ____YES  ____NO  Please comment: ____________________________
18. What kinds of experiences should an orientation workshop provide?

____________________________________________________________________

19. If enough interest could be aroused in providing in-service workshops for experienced substitute teachers, would you be willing to serve as a member of a workshop staff? ___YES ___NO Please comment: __________________________________________

____________________________________________________________________

20. What do you believe are among the experiences that should be provided at such an inservice workshop? ________________

____________________________________________________________________

Please return this questionnaire to your principal.

William Sumner, Principal
Tomlinson/Honer Schools