

**NO SUBSTITUTION FOR SUBSTITUTE TEACHING EXPERIENCES:  
A CASE STUDY EXPLORING PERSPECTIVES OF  
NEW SUBSTITUTE TEACHERS**

by

Linda S. Barnes

A Dissertation Submitted to the Faculty of  
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Doctor of Philosophy

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This dissertation was prepared under the direction of the candidate's dissertation advisor, Dr. Michelle Vaughan, Department of Curriculum and Instruction, and has been approved by all members of the supervisory committee. It was submitted to the faculty of the College of Education and was accepted in partial fulfillment of the requirements for the degree of Doctor of Philosophy.

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## **ABSTRACT**

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Substitute teachers organize the classroom and instruct students in the absence of the regular teacher. An expectation placed on substitute teachers is to ensure learning experiences continue (Duggleby & Badali, 2007); however, this charge may exceed the preparation. Three central research questions and four sub-questions guided this case study. The questions focused on initial experiences of new substitute teachers in a Kindergarten through twelfth grade public school, the factors they believed influenced their confidence for instruction and perceived strengths and weaknesses of the required training in a large urban public school system. This case study explored perspectives of 32 new substitute teachers. An online survey, semi-structured interviews, and artifact reviews captured data. Online tools organized data for coding and analysis to discover themes and answer research questions. Findings indicated that the initial experiences substitute teachers had while working were varied, significant and often had a direct impact on their own performance and perceptions of school community members.

Lesson plans, student activities and classroom management contributed to a new substitute teacher's success in the classroom. Opportunities to interact with school community members strengthened a sense of belonging. These feelings were reflected in their own confidence as a substitute teacher. Additional factors impacting confidence included a personal knowledge of subject areas being taught, consistency with job assignments and building relationships with students in the classroom. The required training for the new substitute teachers highlighted more strengths than weaknesses along with a few recommendations for improvement. Implications from this study can uncover, design and implement a pipeline to full-time teaching - experience as a substitute teacher. There are no substitutes for an optimistic, well-prepared, engaged substitute teacher. By understanding the perceptions of new substitute teachers, a new direction improving the work of this instructional position as a valuable school community member is justified.

## **DEDICATION**

I dedicate my dissertation to my family and friends. Whether close or far, their interest and encouragement was a constant presence and source of inspiration.

A special feeling of gratitude to my husband, Don Barnes, whose words of comfort and confidence supported me throughout the process. I will always appreciate all that he did for me, especially for the hours of proofreading.

I also dedicate this dissertation to my sons, Jeremy and Justin. As graduate and undergraduate students themselves throughout my entire doctoral program, they supported my decision while pursuing their degrees and starting new careers. They make me so proud each and every day!

This dissertation is dedicated to the memory of my mother, Barbara Lanzetta Slight. Although she knew of my interest to pursue a doctoral degree, she was unable to be a part of my journey and graduation.

Finally, I dedicate my dissertation to all the substitute teachers, who are my unsung heroes and continue to serve as a source of inspiration in my work as a life-long educator.

**NO SUBSTITUTION FOR SUBSTITUTE TEACHING EXPERIENCES:  
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LIST OF TABLES .....	xiii
CHAPTER 1 .....	1
Statement of the Problem.....	1
Challenges for a Substitute Teacher .....	2
Lack of Consistency in Substitute Teacher Assignments.....	3
Pandemic Impacts on Substitute Teachers .....	4
Purpose of Study.....	5
Significance of the Study .....	6
Theoretical Framework.....	9
Andragogy .....	9
Self-Efficacy .....	11
Social Constructivism.....	13
Definition of Terms.....	15
CHAPTER 2: LITERATURE REVIEW .....	18
Method for Review .....	19
Criteria.....	20



Review of Relevant Literature .....	22
Factors Contributing to Perspectives of Substitute Teachers .....	23
Substitute Teachers' Feelings or Opinions .....	24
Preparedness, Growth and Development.....	26
Pre-Employment Preparation of Substitute Teachers.....	28
Substitute Teacher Preparation .....	31
Substitute Teachers Working in the School Community .....	33
Experiences as Social Interactions .....	35
School Community Engagement .....	36
Importance of Substitute Teachers .....	37
Conclusion .....	38
CHAPTER 3: METHODOLOGY .....	41
Qualitative Inquiry .....	42
Research Questions.....	42
Research Design .....	43
Research Site .....	44
Role of Researcher.....	45
Participants .....	46
Data Collection Tools .....	47
Online Survey .....	47
Semi-structured Interviews.....	48
Artifact Analysis.....	50

Data Collection and Analysis.....	51
Online Survey .....	52
Semi-structured Interviews.....	52
Artifact Analysis.....	53
Coding Process .....	54
Reliability and Trustworthiness.....	55
Limitations.....	56
Delimitations .....	57
Summary.....	57
 CHAPTER 4: RESULTS.....	 59
Purpose of Case Study .....	59
Research Methodology .....	60
Participants.....	62
Recruitment .....	63
Survey Participants .....	64
Interview Participants .....	65
Data Collection .....	67
Data Analysis .....	70
Substitute Teacher Experiences .....	78
Lesson Plans, Student Engagement and Management Techniques.....	79
Individual Conversations with School Administrators.....	84
Communicating with Faculty On and Off Campus.....	86
Exchanges with Staff.....	88

Conclusion .....	90
Confidence Factors for Instruction .....	92
Familiarity with Role as a Substitute Teacher .....	94
Confidence Improved with Subject Matter Knowledge and Access to Lesson Plans	95
Confidence Raised with Frequent Experiences Working in a School Community...	97
Confidence Impacted Through Positive Student Interactions .....	98
Summary .....	99
Substitute Teacher Training .....	100
Training Content, Resources and Design of Activities .....	102
Application of New Knowledge .....	105
Recommendations for Future Trainings .....	107
CHAPTER 5: DISCUSSION, RECOMMENDATIONS AND IMPLICATIONS .....	111
Summary of Findings .....	112
Substitute Teacher Crisis Due to COVID-19 Pandemic .....	116
Shifting from Substitute Teacher to Guest Teacher .....	119
Recommendations and Implications .....	121
District Policies and Practices .....	121
Introductions, Orientation and Recruitment by School Administrators .....	123
Interactions with Sub Coordinator about Job Assignments .....	127
School Community .....	128
Faculty Conversations and Teachers' Lesson Plans .....	130
Substitute Teachers' Mindset in Classrooms .....	133

Preparation and Ongoing Development of Substitute Teachers.....	136
Substitute Teachers as Classroom Observers .....	137
Substitute Teacher Training as an Online Learning Experience Only .....	138
Future Research .....	142
Final Thoughts .....	144
APPENDICES .....	147
Appendix A.....	148
Appendix B.....	149
Appendix C.....	150
Appendix D.....	153
Appendix E.....	154
Appendix F.....	157
Appendix G.....	158
Appendix H.....	161
Appendix I.....	167
Appendix J.....	168
Appendix K.....	169
REFERENCES .....	170

## LIST OF TABLES

Table 1. Education and Training Requirements in Top Public School Districts .....	28
Table 2. Demographics of Survey Participants.....	64
Table 3. Interview Participants .....	66
Table 4. New Codes Developed After First Round of Coding.....	74
Table 5. Interrater Reliability Results of Interview Responses .....	76
Table 6. Substitute Teachers Currently Working as Full-Time Employees in ECSD....	124
Table 7. ECSD’s Rules of Engagement for Substitute Teachers.....	134

## **CHAPTER 1**

School days spent with substitute teachers are experiences shared globally by Kindergarten through twelfth grade students. Internationally, students spend one full year, or more, from Kindergarten through twelfth grade with a substitute responsible for teaching and learning (Lunay & Lock, 2006; Nichols & Wells, 2017; Vorell, 2012). Substitute teachers organize the classroom as a learning environment to instruct students in the absence of the regular teacher. This indicates that schools are unable to operate without contributions of substitute teachers (Duggleby & Badali, 2007). School system educational leaders and classroom teachers expect substitute teachers to maintain cohesion of the learning (Duggleby & Badali, 2007). The expectation placed on substitute teachers is to ensure learning experiences continue (Duggleby & Badali, 2007); however, this charge may exceed the preparation. Spotlighting the reality of time students spend with substitute teachers clearly identifies a call to action to respectfully advance the role of the substitute teacher to strengthen academic contributions made in the classroom. This study will explore how new substitute teachers describe their initial teaching experiences in a Kindergarten through twelfth grade public school classroom after participating in the required training.

### **Statement of the Problem**

Professional learning activities focused on the role and responsibilities of a substitute teacher performed in school classrooms with students are essential. Currently, there are no national or state standards guiding the growth and development of substitute

teachers. Consistency does not exist in the decisions for preparedness. Application and hiring processes follow school system requirements to determine eligibility for temporary employment. There is no accountability for the level of readiness to be effective.

However, if a substitute teacher is unsuccessful or does not perform as expected, he or she will be dismissed, following local procedures, and rendered unable to accept future assignments. If substitute teachers are expected to maintain the continuity of learning in the absence of a permanent teacher, then adequate training is necessary. Development for this position must go beyond written or published materials; there is a need to connect role and responsibilities to real-world experiences. As previously explained, substitute teachers are a vital position; thus recruitment, development and retention efforts are necessary.

### **Challenges for a Substitute Teacher**

A condition of employment for a substitute teacher as a temporary or part-time employee in a Kindergarten through twelfth grade school system may require participation in training and development. Successful completion potentially affects a substitute teacher's skill and proficiency as a classroom teacher. Professional development alone is a missed opportunity for substitute teachers without follow-up support by training providers, classroom teachers, school leaders, and/or district personnel (Lunay & Lock, 2006; Gonzales, 2002). Growth is also possible outside of a formal training. Substitute teachers can collect ideas at different schools through observation and discovery (Trotter & Wragg, 1990). This independent learning fills a desire for ongoing knowledge beyond the opportunity to personally engage in a training session with fellow substitute teachers. The degree to which strategies and techniques

learned during a training are implemented by a substitute teacher reflects a personal decision to incorporate what was learned. Asking substitute teachers to describe experiences using the new learning potentially leads to revised or new training designs.

### **Lack of Consistency in Substitute Teacher Assignments**

A sense of obligation to embrace the substitute teacher as a full-time faculty member is lacking. Without a continuous and consistent place of employment minimizes a school community's time and opportunity to provide support that is satisfying to substitute teachers (Duggleby & Badali, 2007). Exceptions are pool substitute teachers who work at the same school daily or interim substitute teachers who accept assignments for an extended period. These two classifications of substitute teachers are accepted as faculty members. Daily substitute teachers that accept assignments in many separate locations lack any consistency to build relationships with a school's faculty or staff. As an effective alternative to the permanent teacher, this absence of a continued presence on campus creates a void. To counteract this gap is possible when daily substitute teachers are offered an opportunity to return to one or a small number of schools on a regular basis. Remaining in the same locations increases self-confidence when working in a classroom thus contributing to a positive experience (Bandura, 1977). This motivation creates a desire to expand the number of days working as a substitute teacher. School communities must recognize that consistent employment conditions affect a substitute teacher's perception of their role contributing to decisions to remain or leave the position.



## **Pandemic Impacts on Substitute Teachers**

Substitute teaching amid the COVID-19 pandemic beginning in the spring of 2020 created an unprecedented reality contributing to a complex issue. Expectations of employment availability, preparations for remote learning and engaging students in synchronous and asynchronous online lessons are simultaneously occurring without any past or best practices guiding future actions. Current educational conditions heighten an immediate need to understand even more about substitute teacher experiences. With a transition of traditional schooling to remote learning, teachers remain as the instructional leaders. On those occasions when the permanent teacher is unable to complete his/her online teaching responsibilities for a short or long-term absence, a substitute teacher position is a viable option to maintain momentum within a virtual learning environment similar to in-person instruction (Duggleby & Badali, 2007).

With the onset of fast-track “how to teach online” professional development for full-time teachers, a parallel track for substitute teachers could be established. This eliminates any duplication of training services. An abundance of resources to guide and supplement online instruction has surfaced for educators causing feelings of being overwhelmed with uncertainty of where to begin effectively. Substitute teachers are capable of filling a void when a teacher absence is required for personal reasons or professional growth. Reaching out universally to invite substitute teachers to join new digital practices and experiences brings them into the fold of participating in online teaching and learning, from a distance.

To summarize this section, educators are expected to be lifelong learners without exceptions. Substitute teachers are educators and as such deserve equal access and

opportunity to hone their craft. Adequate preparations are needed for a substitute teacher to assume student supervision responsibilities, maintain effective classroom management and follow lesson plans provided by the permanent teacher. Knowledge and understanding of school policies is needed to complement the completion of lessons and instructional activities towards a productive school day for students and the substitute teacher. Substitute teachers are stakeholders actively contributing to the teaching profession. Connecting real-world experiences of substitute teachers to the required Substitute Teacher Training is imperative to expand and improve current processes. The recruitment, development and retention of substitute teachers are critical. Daily in East Coast School District (ECSD), the number of teacher absences exceeds the number of available substitute teachers resulting in a 70-80% fill rate of vacancies. The remaining 20-30% of students in classes are without a teacher or a substitute teacher. Schools must make instantaneous decisions to ensure all students are placed with a teacher. Options include doubling up of classes, students split between teachers, cancellation of elementary specials (art, music, or physical education) and/or support staff pulled to cover classes. Large gatherings of students in a media center, auditorium or gymnasium require fewer adults for supervision without any instruction. All adjustments are disruptions!

### **Purpose of Study**

The purpose of this case study is to describe how new substitute teachers characterize their initial classroom experiences following the Substitute Teacher Training in ECSD in order to contribute to their preparedness, confidence, and professionalism along with improving the design of the training. Initial classroom experiences are

generally defined as perceptions of instructional activities implemented following training and social interactions within one quarter or nine weeks of a school year. The substitute teachers' personal perspectives have the potential to inform educators about their role to minimize loss of instructional time while maximizing student achievement. To explore perspectives of substitute teachers, three central research questions and four sub-questions will guide this case study:

1. What are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school?
  - a. How do new substitute teachers describe their classroom experiences?
  - b. How do new substitute teachers describe their experiences with administrators?
  - c. How do new substitute teachers describe their experiences with faculty?
  - d. How do new substitute teachers describe their experiences with staff?
2. What factors do new substitute teachers believe influence their confidence for instruction?
3. What do new substitute teachers perceive are the strengths and weaknesses of the required training?

### **Significance of the Study**

Many factors contribute to substitute teachers' feelings about their instructional actions and behaviors as a temporary classroom teacher in schools. Substitute teachers believe few others value their work (Coverdill & Ourlvey, 2007). Negative perceptions and low expectations of substitute teachers from permanent teachers marginalize relief teachers (Lunay & Lock, 2006). As a marginalized group, substitute teachers are often

isolated from peers (Duggleby & Badali, 2007; Nichols & Wells, 2017; Trotter & Wragg, 1990). Substitute teachers, as outsiders, are marginalized, powerless, and isolated by the education community (Duggleby & Badali, 2007). Marginalized groups find difficulty with participating in the social learning necessary thus preventing participation in professional development impeding skill and knowledge acquisition (Nichols & Wells, 2017). Powerlessness contributes to alienation, or persistent negative feelings, leading to an inability to demonstrate a substitute teacher's full skill set causing depression (Lunay & Lock, 2006; Vorell, 2012). There is also a fear of retribution if job assignments are not accepted (Duggleby & Badali, 2007). Substitute teachers are expected to conform to boundaries such as rules, procedures, instructional plans, and materials established by the full-time teacher (Charteris et al., 2017). Any deviations and alternatives contribute to loss of instructional time further impacting the feelings of self-doubt, marginalization, powerlessness, and/or lack of skills by a substitute.

Successful participation in training programs supports a substitute teacher's skill and proficiency as a classroom teacher. Substitute teachers' perspectives (positive or negative) of their teaching experiences and professional growth influence their own actions and behaviors, potentially contributing to either a strong cadre of substitute teachers or creating a shortage causing loss of instructional time and negative impact on student achievement (Shilling, 1990; Nidds & McGerald, 1994). Substitute teachers may either perceive themselves positively or feel disappointed by the school system unable to operate without them with the world's most precious resource, our children. Little discussion exists on their perceived significance in the classroom.

If school communities embraced substitute teachers as members of a school community, then positive contributions can be made to teaching and learning. With limited research about substitute teachers, doors are open to future studies. This study will support an optimistic view of new substitute teachers to raise recognition, trust and respect from the education community that relies on their service to alleviate interruptions and contribute to productive school days. Recognition of social interactions that influence the actions and behaviors of a substitute teacher leads to a level of respect exhibited by school administrators, faculty, and staff. Listening to gain insights from new substitute teachers informs decisions in support of quality training and development opportunities.

Education systems entrust substitute teachers with the world's youth primarily out of need. This study aims to examine perspectives of new substitute teachers. By exposing the realities of daily substitute teachers, change is possible to strengthen classroom preparation and engagement with others. This is achieved by capturing their descriptions of teaching experiences, outcomes of training, and perceived regard by school community members. "Research suggests that substitute teachers endure an occupational dichotomy, whereby on the one hand they are seen as babysitters, and on the other hand as *guest teachers* [emphasis added]" (Vorell, 2012, p. 488). If studies found that the effectiveness of substitute teachers could increase when regarded as prepared and professional members of the education field, then contributions could be extended to classrooms around the globe. An additional recognizable significance is that teaching and learning would never stop.

## **Theoretical Framework**

Substitute teachers step into a classroom and step up as the guest teacher. To frame this experience begins with a willing and able adult seeking temporary employment as an educator. This study is guided by three theories that explain the substitute teacher experience and provide a framework for studying them. The three scholars and their respective theories include Knowles (1980) with andragogy, Bandura (1977) on self-efficacy, and Dewey (1897, 1938) with social constructivism. This framework highlights an individual's actions to be prepared, ready, and supported earning the distinction of a successful substitute teacher.

### **Andragogy**

Andragogy, according to Knowles (1980), is a theory specifically for adult learning and focused on creating effective learning experiences built on competencies and strengths. Especially in the field of education, Knowles' (1980) methods and principles of adult learning contribute to the professional growth of educators intended to enhance job performance that positively impacts student achievement. Understanding how adults learn and how they learn most effectively are generalizations in the theory of andragogy and not directed towards any individual. From the lens of substitute teachers, their active involvement in the training is as self-directed learners. The implication is that engagement is dependent on taking ownership of the need to learn something new.

Knowles' (1980) four principles focus on process, how to approach adult learning, over content that outlines what the adults will learn. The first notes that adults, substitute teachers in this case study, prefer to know the purpose of why they are learning something. This means they need to know how the training will be conducted, what

types of learning will occur and why it is important. Secondly, adults need to learn through experiences which are available with training and jobs as a substitute teacher. Respecting individuality of each adult learner by validating prior experiences adds dimension to the new learning. Adult learners are encouraged to connect what they learned in the past as a foundation to build upon new knowledge. “In other words, to not take into account the learning that adults have acquired through their experiences is essentially a denial of who they are, where they have come from, and their differences and similarities” (Caffarella & Daffron, 2013, p. 53). Next, adults discover relevance in task specific and problem-solving learning. Substitute teachers need to solve problems on a regular basis since each school community is different. Lessons learned from one situation can be applied to a new experience with confidence. This suggests that adults learn not only by doing, but by reflecting on practice (Caffarella & Daffron, 2013). Lastly, adults are motivated to learn when they can make an immediate connection to the topic that is relevant to a job or personal life. “When teachers try new approaches to instruction and those approaches resonate with students, they naturally want to continue their efforts” (Hite & Donohoo, 2021, p. 26). For substitute teachers, the training is linked to potential employment at schools which may help their lives in different ways. Knowles’ (1980) theory about adult learning applies to substitute teachers but not without challenges and the need for suggestions to improve training that follows his four principles as discussed.

If training is called adult learning, then adult learners must be treated as adults and not as Kindergarten through twelfth grade students. During the training, a non-judgmental and supportive learning environment is necessary. Without consistent

support by training providers for substitute teachers, who will show up to help out in the classrooms when the permanent teacher is absent? Substitute teachers are often in short supply and shortages are exacerbated when districts are hit with increased absences. As accountability demands continue to rise regarding student achievement, it is in the best interests of school systems to ensure that substitute teachers are equipped with the requisite knowledge and skills to perform at a proficient level or higher. This will maximize teaching and learning and recognize substitute teachers with a more positive distinction as guest teachers. That one adjective (guest) may affect a substitute's ability to overcome feelings of loneliness or isolation contributing to a feeling of being part of a school community.

### **Self-Efficacy**

Psychologist Bandura (1977) believed that people's behavior is affected by how they think, believe and feel; his theory on self-efficacy calls for an individual's belief in his or her capacity to behave and work in ways necessary to fulfill a goal. For substitute teachers, they have the initiative to apply effort when performing instructional tasks. Since no two classrooms are alike, the belief that one's actions have influence over the outcome of a given situation will transfer from one classroom to the next. Bandura (1977) describes personal efficacy derived from four principle sources of information. The first is performance accomplishment or a personal assessment of one's accomplishments. Bandura (1977) referred to this as the most powerful source of efficacy. This experience is constructed at individual and social levels. Hite and Donohoo (2021) elaborated on performance accomplishments as a source of internal motivation; performance accomplishments or "mastery experiences generate an



influential source of efficacy because repeated success raises future expectations for success” (p. 49). This means that when a substitute teacher recognizes success with students in an instructional setting, the experience will be internalized, bolstering one’s self-efficacy. Next is vicarious experiences. This is achieved through observation of successful activities performed by others. Substitute teachers could be exposed to highly effective classroom teachers and/or substitute teachers as a model for performance. “Models are a source of aspiration, competencies, and motivation. Seeing people similar to oneself succeed by perseverant effort raises observers’ beliefs in their own abilities. The failures of others instill self-doubts about one’s own ability to master similar activities” (Bandura, 1998, p. 54). Thirdly, verbal persuasion helps people believe they can handle tasks successfully. This causes them to put forth more effort into their actions. When a substitute teacher is convinced they have the skill set to be an effective instructional leader and it is confirmed by others; then they are more likely to experience success and less likely to fail. This sense of self-efficacy positions a substitute teacher as capable of meeting student needs applicable to their assigned classroom for a school day. Finally, physiological states can either positively influence or decrease confidence to perform specific tasks. “Positive mood enhances a sense of efficacy; depressed mood diminishes it” (Bandura, 1998, p. 54). When a substitute teacher is uncomfortable with the work they are performing either in or out of a classroom, negative feelings will be triggered. Therefore, school administrators, faculty and staff should strive to mitigate and extinguish stressful situations for substitute teachers.

A challenge with self-efficacy is the lack of confidence felt by a substitute teacher. The cause may occur because an individual who seeks temporary employment

as a substitute may or may not have any educational experience. When compared to others who want to substitute, they may have the minimal education requirement and/or varying work experiences. Solutions to these challenges are possible as a substitute gains experience and familiarity with schools. This may promote productive interactions positively contributing to self-efficacy. If substitute teachers' actions are successful, then they will believe in their success and feel much better about themselves. The mindset of substitute teachers is to create a productive day of learning for students thus creating a level of confidence of what goes on in the classroom academically, behaviorally and socially.

### **Social Constructivism**

Dewey (1897, 1938) is recognized for his theory of social constructivism. Research on substitute teachers which employed a socio-constructivist lens has been engaged in exploring learning by doing in a classroom. In this context, substitute teaching is a social interaction between adults and children. This occurs through social interactions and group learning as opposed to individual education. According to Dewey (1897, 1938), authentic learning is possible and shaped by one's environment, or what is learned from others is internalized and valued. When others recognize the work of a substitute teacher, this increases chances of social interaction between a substitute teacher and permanent teacher. "All human experience is ultimately social: that it involves contact and communication" (Dewey, 1938, p. 38). This connection is preferable. For example, with no two classrooms identical, a substitute must create his/her own repertoire of teaching strategies, activities and bag of tricks. Each day potentially brings a totally new experience than the day before with the substitute teacher adjusting their social

actions to what works best in the moment. Job-embedded learning is possible with an increase in the frequency of substituting. Trainings provide opportunities for substitute teachers to discover and create their own instructional and management techniques for an assigned position. Training models can change. The intent is to meet the needs of the system hiring substitute teachers as temporary employees. Advances in technology are enhancing learning from a distance to support real-time interactions. Training is one solution; another is capitalizing on the social interactions with fellow teachers to strengthen the role of the substitute by all stakeholders.

Substituting is more than a solo act; social interactions with fellow teachers strengthen the role of the substitute teacher in the eyes of the students, faculty and administration. This broadens a substitute teacher's circle of influence from a social constructivist theory perspective that calls for jointly assembled new learnings based on real-world encounters. These experiences reflect Dewey's (1938) theory of experience to instructional experiences of a substitute teacher acknowledging that one's social context, either individually or with others, is shaped by past experiences informing the present (Nichols & Wells, 2017). Dewey believes learning evolves through social interactions with ever-changing experiences; thus, substitute teachers' professional practices influenced by internal and external occurrences are worthy of reflection (Nichols & Wells, 2017; Duggleby & Badali, 2007).

Embracing all three theories as a theoretical framework to support a permanent change of knowledge, skills and behaviors contributes to building capacity for a robust substitute pool. Regardless of educational and/or professional experience, the potential substitute teacher must engage in training to learn the necessary knowledge and skills to

effectively perform the job. With personal interest and foundational preparation intact, the substitute teacher is equipped to enter a classroom. From the second day forward, a substitute teacher will gain confidence with initial classroom experiences. These feelings will intensify with opportunities to interact with the school community. Building relationships with administrators, faculty and staff will strengthen self-confidence and transfer to deepen developed knowledge and skills. Training and experiences are influenced by seminal authors whose work as a collective creates a theoretical framework to study classroom experiences of a substitute teacher. The teaching profession has the capacity to use what is known or can be learned about andragogy, self-efficacy and social constructivism to create a plan of action that accentuates the role of a substitute teacher.

### **Definition of Terms**

The following are terms and definitions used in this research case study.

#### **Behavior Management**

Specific procedures and practices for reinforcing positive behaviors and decreasing undesirable behaviors for an individual student (Smith et al., 2016).

#### **Classroom Management**

Describes procedures intended to maintain order in the classroom for continuous lessons, minimizing or eliminating disruptions from students interfering with teaching and learning.

#### **Daily Substitute Teacher**

One who accepts work assignments in any grade level one day at a time at the same or different schools.

**Guest Teacher**

An alternate term to visualize a substitute teacher as a guest and filling in for another teacher with the intent to receive more respect (Vorell, 2012).

**Interim Substitute Teacher**

Employed to take the place of a contracted teacher who is expected to return during the school year, must have at least a bachelor's degree and is expected to be in the position for at least 20 days. He or she does not have to be certified in the subject area they will be teaching.

**Instruction**

Class learning activities led and guided by the teacher to deliver content knowledge towards student mastery.

**Lesson Plans**

A detailed set of instructions that outline class activities for the day, including lessons to be taught, materials to be used, schedules to be met, and other pertinent information relating to student instruction and behavior management (Smith et al., 2016).

**Substitute Pool**

Online repository of information on all eligible substitute teachers.

**Substitute Teacher**

An individual responsible for organizing the classroom as a learning environment to instruct students in the absence of the permanent teacher. Internationally, substitute teacher synonyms include casual teacher, casual relief teacher, relief teacher, supply teacher, guest teacher and emergency teacher.

**Pool Substitute Teacher**

Reports to the same location each day and may have a minimum of 180 student days of employment.

## **CHAPTER 2: LITERATURE REVIEW**

Professional learning courses focused on the role and responsibilities of a substitute teacher performed in school classrooms with students are essential. Current practices require a minimum of training, leading to less than optimal outcomes. A focus on access and availability to training, relevance and practicality of the new knowledge and skills addresses a need to affect job performance elevating current practices. A condition of employment for substitute teachers as a temporary or part-time employee in a Kindergarten through twelfth grade school system may require participation in initial training and development. Successful participation in training programs supports a substitute teacher's skill and proficiency as a classroom teacher. Professional development alone is a missed opportunity for substitute teachers without follow-up support by training providers, classroom teachers, school leaders and/or district personnel (Lunay & Lock, 2006; Gonzales, 2002). Growth is also possible outside of a formal training. Substitute teachers are able to collect ideas at different schools through observation and discovery (Trotter & Wragg, 1990). This independent learning fills a need for ongoing development without the opportunity to personally engage in a training session with fellow substitute teachers.

Substitute teachers' perspectives (positive or negative) of their teaching experiences, professional growth, and community support impact their own actions and behaviors potentially contributing to a strong cadre of substitute teachers or creating a

shortage. A person's will to perform a job is the foundation that propels one's self-worth and productivity. A substitute teacher is impressionable by the actions of others. A sense of obligation to embrace the substitute teacher as a full-time faculty member is lacking. Without a continuous and consistent place of employment, minimal support may be given to a substitute teacher by the school community. This lack of recognition and employment conditions affect a substitute teacher's perception of their role contributing to decisions to remain or leave the position. The following sections of this literature review will explore the teaching experiences of substitute teachers.

### **Method for Review**

An analysis and comparison criteria from Boote and Beile (2005) for a literature review was used to organize the data and critique the quality of the research studies focused on substitute teachers. Peer reviewed studies were located using the ERIC and GALE educational databases including SearchWise available through Florida Atlantic University Libraries and Google Scholar web search engine. Search terms with key topics were expanded to include familiar words and word phrases to maximize available literature elicited: substitute teachers, substitute teaching, substitute teachers perceptions of teaching, professional development for substitute teachers, professional learning for substitute teachers, training for substitute teachers, impact of professional development, professional learning, training, instructional delivery of substitute teachers, pedagogy of substitute teachers, classroom management of substitute teachers, strategies used by substitute teachers, student behaviors with substitute teachers, relief teacher, casual teacher, emergency teacher, guest teacher, school community support, and school



relationships. A total of 50 articles were located using the search terms and key topics and downloaded for ongoing use and reference.

## **Criteria**

Abstracts from all 50 articles provided sufficient information to enter into an excel spreadsheet listing author/s, full title of article, year of publication, APA citation, database location if applicable, and 11 inclusion criteria.

Inclusion criteria were used to create a rationale to compare and analyze similar studies and studies of quality found using identified search terms and key topics:

1. Peer-reviewed studies present scholarly work that is comprehensively reviewed by experts in the field prior to acceptance for publication. A peer-reviewed study lends credibility to the published work with respect and acceptance within academia.
2. Country location of the study included national and international locations establishing substitute teachers as workers within an education system world-wide. Included in order of frequency are United States (9), Australia (3), United Kingdom (3) and Canada (2).
3. Kindergarten through twelfth grade substitute teaching experiences separated the work of substitute teachers from that of full-time classroom teachers. The work of substitute teachers takes place in the absence of the permanent teacher.
4. Substitute teacher professional development encompasses opportunities for training and growth exclusively for individuals substituting in a Kindergarten through twelfth grade school setting. Opportunities may be required and/or

available prior to beginning as a substitute teacher or ongoing while substituting, avoiding school day times.

5. Community considerations seek to determine the degree of engagement afforded to a substitute teacher. Acceptance into a community may or may not be achieved through the efforts of the substitute teacher or school members.

In addition, no restriction on the publication date of articles was enforced in order to represent a range of historical perspectives. Despite the 33 year span of cited studies, ones with similar foci presented a thread of commonalities with the past informing the present. “The literature on substitute teachers that dates back 40 years is still significant because many of the issues identified then still remain” (Duggleby & Badali, 2007, p. 23).

Exclusion criteria predominately included non-studies lacking data collection and substantiated results. These included published pieces such as opinions/editorials, journaling, employment and assignment procedures, and best practices for substitute teachers. Studies representing perceptions of school-based leaders, faculties, staff, and students were omitted for not representing perceptions of substitute teachers. The inclusion and exclusion criteria produced a sample total of 17 studies for the literature review. Seventeen studies were coded using Boote & Beile (2005) criterion. Four additional criterion codes were created due to frequency of use and reference within selected studies: participants, research question/s, specific location of study, and role of researcher. Identifying the composition of the participants and the sample size included in each study provided a range of results from small groups to larger groups. Research questions vary or are similar in guiding inquiry for the method of study about substitute

teachers. Countries beyond the United States were included to explore similarities or differences in the role of a substitute teacher. The role of the researcher was added evidenced by authors' working in schools as substitute teachers as part of their study.

### **Review of Relevant Literature**

Connecting individual teaching experiences of substitute teachers to their well-being within social interactions includes personal feelings, perspectives, and support mechanisms. Such a connection exists between substitute teachers and their students as a “temporary field experience with the potential for transformative performance” (Bletzer, 2010, p. 419) through learning by doing along with others thus counteracting a substitute teacher's individual feelings of loneliness (Duggleby & Badali, 2007). This is also accomplished when the substitute teacher conveys to the students that he/she fully comprehends the permanent's teacher's plans for the day (Vorell, 2012). Every classroom space is different, and a substitute teacher is expected to manage the day without making any adjustments, leaving the classroom exactly as they found it (Vorell, 2012). This means a substitute teacher has a choice to assume the role as baby-sitter or guest teacher (Vorell, 2012).

The variety of terms that exist and are used for substitute teacher across international contexts reveals the varying perceptions that others have of this instructional role. In Australia, substitute teachers are referred to as casual relief teachers or CRTs (Charteris, et al., 2017). These individuals' subjectivities are positioned by schools as convenient and expendable employees to serve students, remain employed to fill gaps and advance student performance causing CRTs to be viewed as fluid and relational; changing from one school site to the next (Charteris, et al., 2017). As long as teachers

earn and use paid leave, the need for substitute teachers is constant. In addition, work-related responsibilities and opportunities also create time when the full-time teacher is absent from the classroom. Within the classroom walls, substitute teachers make decisions in the best interests of the students during a school day, thus positioning them as an instructional leader responsible for teaching and learning.

### **Factors Contributing to Perspectives of Substitute Teachers**

Many factors contribute to substitute teachers' feelings about their instructional actions and behaviors as a temporary classroom teacher in schools. Substitute teachers believe few value their work (Coverdill & Ourlvey, 2007). Negative perceptions and low expectations of substitute teachers from permanent teachers marginalize relief teachers (Lunay & Lock, 2006). As a marginalized group, substitute teachers are often isolated from peers (Duggleby & Badali, 2007; Nichols & Wells, 2017; Trotter & Wragg, 1990). Substitute teachers, as outsiders, are marginalized, powerless and isolated by the education community; marginalized groups find difficulty with participating in the social learning necessary thus preventing participation in professional development impeding skill and knowledge acquisition (Duggleby & Badali, 2007; Nichols & Wells, 2017). Powerlessness contributes to alienation, or persistent negative feelings, leading to an inability to demonstrate a substitute teacher's full skill set causing depression (Lunay & Lock, 2006; Vorell, 2012). There is also a fear of retribution if job assignments are not accepted (Duggleby & Badali, 2007). Substitute teachers are expected to conform to boundaries such as rules, procedures, instructional plans and materials, established by the full-time teacher (Charteris et al., 2017). Any deviations and alternatives contribute to

loss of instructional time further impacting the feelings of self-doubt, marginalization, powerlessness and/or lack of skills by a substitute.

### **Substitute Teachers' Feelings or Opinions**

Using grounded theory for analysis identified a trend revealing substitute teachers' perceptions of how instructional or behavioral issues and/or concerns raised contribute to substitute attrition rates in only two studies. Coverdill and Oulevey (2007) "began with a grounded theory approach (Glaser & Strauss, 1967) that entailed simultaneous involvement in data collection and analysis" (p. 537). For their study, it was a combination of the one author's work as a substitute teacher combined with the other's author's work with first-round of interviews. In the second study, to affirm emergent categories, Vorell (2012) followed grounded theory procedures with triangulation in both participant observation and in-depth interviews to answer research questions. Following an examination of additional qualitative studies reflects the potential to increase this research method to gather and analyze data. If given the opportunity, a substitute teacher's participation as an author in a research study not only offers a unique perspective, but it also increases credibility in the results from the viewpoint of a practitioner. The substitute teacher in the role of a researcher shifts the power from an outsider to an insider and accurately portrays authentic experiences compared to shared recollections.

Based on Vorell's (2012) study using grounded theory, he found that stress felt by substitute teachers can be caused by length of workday, geographical location of school, expectations, and personalities of adults and children at assigned school (Vorell, 2012). To counteract symptoms, utilization of problem-centered and avoidance-centered coping

strategies (Vorell, 2012) was studied. Another perspective to understand how substitute teachers deal with stressful situations, Lunay and Lock (2006) used “a psychological alienation-non-alienation model, adapted from Finn (1989) and Carlson (1995)” (p. 172) to identify individual feelings of isolation coupled with conditions causing alienation resulting from being a relief teacher.

Stress felt by a substitute teacher is counteracted through enjoyment of time with children to impress school administration aligned to the notion of legitimate peripheral participation (Duggleby & Badali, 2007). This participation begins for the substitute teacher as a newcomer who gains experience over time until reaching a comfort level as a familiar face on campus. Until that consistency of familiarity is reached, it is possible to reduce anxiety if substitute teachers are limited to grades/subjects taught for which they feel competent (Johnson et al., 1988). Additionally, substituting affords “personal freedom and choice” (Cornwall, 2004, p. 15) notwithstanding demands of the job including last minute notices and expectations to perform as per assigned school site with different members in locations with considerable geographical distance between them (Shilling, 1990). Whether at a familiar or fresh location, supply teachers perceive their role as maintaining the status quo by following the permanent teacher’s plans and procedures before interjecting any personal approach (Bletzer, 2010; Trotter & Wragg, 1990). The incompleteness of lesson plans prepared by the permanent teacher is a top criticism of substitute teachers (Bontempo & Deay, 1989; Coverdill & Oulevey, 2007; Duggleby & Badali, 2007; Gonzales, 2002; Manera, 1992; Nidds & McGerald, 1994). These internal struggles may not be avoidable.

Frustration is felt by a substitute teacher due to a lack of awareness of school policies and procedures, thus minimizing comprehension of school culture (Duggleby & Badali, 2007). Encouraging a CRT's membership in a community through inclusive action increases opportunities for engagement (Nichols & Wells, 2017). As relationships build, substitute teachers may be treated more like permanent teachers; rather than no rapport developing between the two groups of workers (Cornwall, 2004). To avoid lack of relationships, school administrators are in a position to embrace the potential of substitute teachers "as a contributor to overall school effectiveness" (Deay & Bontempo, 1986). This positive impact extends with substituting as a viable pathway to full-time teaching and the perceptions of substitute teachers evolving from disregarded to respected educators.

### **Preparedness, Growth and Development**

Professional development alone is a missed opportunity for substitute teachers without follow-up support by training providers, classroom teachers, school leaders and/or district personnel (Lunay & Lock, 2006; Gonzales, 2002). Growth is also possible outside of a formal training. Substitute teachers are able to collect ideas at different schools through observation and discovery (Trotter & Wragg, 1990). This independent learning fills a need for ongoing learning without the opportunity to personally engage in a training session with fellow substitute teachers. Circumstances impeding a substitute teacher's effectiveness include frustration from the lack of available professional development or only with permission to attend if spaces are not filled by full-time teachers (Duggleby & Badali, 2007). Offerings conducted during the school day often preclude substitute teachers from attending training thus participation during non-school

hours is expected, or the only option (Nichols & Wells, 2017). Substitute teachers are frustrated over exclusion from professional development courses as it eliminates any prospect to implement new pedagogies or educational technologies (Trotter & Wragg, 1990). Classroom management continues to be a leading problem for substitute teachers compounded by attempts to meet the needs of students with learning disabilities all while teaching unfamiliar content and following established school/classroom plans and procedures (Bontempo & Deay, 1989; Deay & Bontempo, 1986; Trotter & Wragg, 1990; Nidds & McGerald, 1994).

Allocating human and fiscal resources dedicated to collectively offer high quality job-embedded training encourages social interactions thus minimizing solitude.

Regrettably, the reality is that funding resources for professional development is a sore topic requiring resolution by educational decision-makers (Lunay & Lock, 2006). In a climate of budget shortfalls, training funds are often drastically reduced. This is further expanded to substitute teachers as temporary employees with low prioritization. If local funds are unavailable, institutions of higher education are suitable partners for educational systems as professional learning providers (Manera, 1992). Solutions create opportunities for professional development to be ongoing; if a lack thereof exists, then instructional and classroom management problems arise which are not the fault of the substitute teachers (Lunay & Lock, 2006).

Instructional strategies, class activities and selection of materials are areas of development for substitute teachers (Deay & Bontempo, 1986) to minimize mistakes (Trotter & Wragg, 1990). Factors contributing to substitute teachers' ability to be effective are increased knowledge acquisition and skill attainment from professional



learning impacting teaching experiences. Collaborative planning of school administration and faculty along with substitute teachers to remedy concerns is possible through inservice education meetings (Johnson et al., 1988). At such a meeting or orientation are opportunities to present school policy, procedures, routines, discipline plans, etc. (Johnson et al., 1988; Nidds & McGerald, 1994). School site administration thus demonstrates a mindset of acceptance for the work of a substitute teacher while providing them with essential requested information (Bontempo & Deay, 1989) to eliminate distractions caused by unanswered questions or concerns.

District administrative staff is also competent to provide ongoing opportunities for substitute teachers to share their experiences with others through professional development (Bontempo & Deay, 1989; Deay & Bontempo, 1986). The critical element is for the opportunity to maintain currency with curriculum and assessments included in a national curriculum (Shilling, 1990). Educators are expected to be lifelong learners without exceptions. This belief informs further scholarship to represent current experiences reflecting the past and looking ahead to the future. Substitute teachers are educators as members of a group and as such deserve equal access and opportunity to hone their craft. Educational leaders should be disapproving of school systems without well-developed programs established to assist and support substitute teachers.

### **Pre-Employment Preparation of Substitute Teachers**

To understand current practices on how substitute teachers are prepared in the United States, an online review of the largest fifteen largest public school districts by student enrollment was completed by the researcher. Each district's website provided a designated section or pages for interested persons listing information about employment

eligibility and initial training. Districts detailed minimum education requirements, mandatory training with course titles, length, and any cost to attend. A compilation of information from all 15 districts, in unranked order, indicates minimal to substantial requirements expected of substitute teachers (see Table 1).

**Table 1**

*Education and Training Requirements in Top Public School Districts*

Minimum Education Required	Training	Is Training Mandatory	Length of Training	Cost to Enroll
1. Associate's degree or 60 college credits	Compliance training modules (Child Abuse and Neglect, Bullying, Diversity, Employee Code of Conduct)	Yes	15-20 minutes per module	\$0
2. 60 college credits or 90 college quarter hours	a. Substitute Teacher Training Program b. Substitute Teacher Orientation	Yes, for non-certified teachers only		\$0
3. 30 college credits, or education major or "Teachers for Tomorrow" high school course	Suite of training courses to manage and facilitate virtual classrooms	Yes	Varies	\$0
4. Associate's degree or 60 college credits	ClassSmarts (six online modules)	Yes	18 hours	\$0
5. 60 college credits	Basic Training	Yes	2.5 – 3 hours	\$0
6. Teaching license or Substitute License	"Substitute Strong Start" training	Yes	Varies	\$0
7. Bachelor's Degree or Substitute License	Orientation only	N/A	N/A	\$0

Minimum Education Required	Training	Is Training Mandatory	Length of Training	Cost to Enroll
8. Certified Teacher or completed Student Teaching	Choice of one: a. Substitute Effective Teacher Training b. Effective Teacher Training	Yes, for non-certified teachers only	20 hours (onsite or online)	\$29.00
9. Bachelor's degree	Choice of one: a. STEDI Subskills b. The Master Teacher: Substitute Teacher Online Training c. College Course	Yes, for non-education majors only	8 - 25 hours	\$39.95 - \$100.00 0
10. 30 college credits	STEDI Subskills Training	Yes, for non-certified teachers only	@ 8-10 hours to complete	\$29.95
11. High School diploma	Teacher Match Smart Practices (online modules)	Yes	18 hours	\$0
12. 60 college credits	Substitute Training	Yes	1 day	\$40.00
13. 30 college credits	Temporary Instructor Training (college course)	Yes, for non-education majors only	2 days	\$118.22
14. Bachelor's Degree or pass State's Basic Educational Skills Test	Pre-service Training	Yes	16 hours	\$0

All districts identified a minimum education requirement of interested adults ranging from a high school diploma to a bachelor's degree. Only one district did not include information about any initial training or orientation but relied on a nomination from an educational leader signaling familiarity or experience with the potential substitute teacher. If training was listed on the website, it was unanimous for mandatory attendance with some designating for non-education majors only. This would provide an

opportunity for professional growth for those substitute teacher candidates to gain the necessary knowledge and skills with varying higher education degrees and/or prior professional experience. Online learning is not a new option amid the COVID-19 pandemic; however, the frequency to learn from a distance is widespread among the top school districts.

A commitment of time is expected to fulfill the expectation of training indicating that districts want their substitute teacher to have the requisite skills for temporary employment. Despite that status, one-third of the districts expect the substitute teacher to incur the cost for training. When a cost is attached to secure eligibility to work as a substitute teacher, it is not the district profiting from the collected funds. Districts partner with a professional organization or community college as the training provider that establishes a cost for their course/s. Regardless of education or initial training requirements, all must be completed before a substitute teacher will even be considered to fill the vacancy of a permanent classroom teacher for a day. When that day comes, the substitute teacher will have some training that contributed to their preparation.

### **Substitute Teacher Preparation**

Training for substitute teachers from a social constructive perspective supports an evolution of actions to create experiences that strengthen efforts and heighten significance in the classroom. Since many full-time teachers began their education careers as substitute teachers, learning with and from their experiences can shape and support current practices. Second-career professionals seeking temporary employment as a substitute teacher may or may not have any educational experience. Examples include retired military, first responders, or other educated professionals. Others may have the

minimal education requirement and/or varying work experiences. These differences require substitute teachers to acquire additional skills and knowledge to be successful in unfamiliar classrooms (Bletzer, 2010; Duggleby & Badali, 2007; Trotter & Wragg, 1990).

Social interactions with other professionals allow substitute teachers to fully learn the job which is difficult when working in schools on a short term basis; thus, continuous development is possible within the notion of communities of practice (Duggleby & Badali, 2007, Nichols & Wells, 2017). Ongoing training occurs during communities of practice. Participants grow and develop knowledge and skills as teachers and active members. These experiences are not relegated to one group of educators over another. They represent a shared social experience for anyone interested in participating. Without the opportunity of access, participation and membership in communities of practice place substitute teachers at a disadvantage to effectively use instructional strategies to improve their practice (Nichols & Wells, 2017; Duggleby & Badali, 2007). This socialization is evident when school administrators take responsibility to conduct training on topics such as student behavior management (Gonzales, 2002). With classroom behaviors well-managed, this creates an ideal condition for learning. Accountability demands continue to rise regarding student achievement; therefore, it is in the best interests of school systems to ensure substitute teachers are equipped with the requisite knowledge and skills to perform at a proficient level or higher to maximize teaching and learning.

Options for training have expanded to include onsite or face-to-face trainings, online learning options and/or a blended format to include time spent in both types. The content of any training should include a mix of employment processes and operational

requirements along with instructional strategies and classroom management techniques. Ongoing opportunities offered at appropriate times to maintain effective teaching practices may be preferable. If done correctly, then an education system is able to retain a pool of substitute teachers. This sustainability confirms an individual's desire to pursue substitute teaching. Finally, ongoing support and professional acknowledgements are contributors to continued employment. These characteristics are intended to capture results, with far-reaching implications, to inform the existence of an ever-growing group of educators.

### **Substitute Teachers Working in the School Community**

Recognizing substitute teachers as an integral part of a school's community maintains optimal educational operations. However, current practices do not fully embrace substitute teachers thus expanding the divide between them and the school community. Studies have neglected to connect employment benefit packages to the realities of the disregard school communities portray to substitute teachers. A minimal benefits/high work demand ratio creates undue pressure for substitute teachers. Safety, insurance benefits, paid-time off and difficult or unmanageable student behavior are equally important contributors to being unmotivated to maintain work as a substitute (Gonzales, 2002). Job dissatisfaction stems from substitute teachers' opportunities of working with students, delimited job responsibilities, recognition for accomplishments, and/or perceived value of job performance (Gonzales, 2002). A substitute teacher's conscious decision on how to personally behave while in the classroom with students is an initial call to action positioning them to successfully manage classroom behavior

(Trotter & Wragg, 1990). Substitute teachers must separate their personal and work experiences to guide instructional actions (Vorell, 2012).

Substituting lends itself to flexible scheduling and catching the attention of administration if full-time employment is desired (Duggleby & Badali, 2007). Whenever possible, accepting assignments through personal relationships is found to be more satisfying (Coverdill & Oulevey, 2007), yet difficult when jobs are scarce (Duggleby & Badali, 2007). Work as a substitute is potentially positive despite observable tensions in professional work leading to dissatisfaction (Duggleby & Badali, 2007). If struggles persist, anxiety is harmful to the substitute and learning environment (Johnson et al., 1988). Current practices to employ pool substitute teachers, who must report to a specified school every student day in a school year, or interim substitute teachers when an extended teacher absence is necessary potentially reduces the isolation and job dissatisfaction felt by a substitute teacher. This daily presence heightens the participation and contribution of substitute teachers as valuable school community members. School systems should build an infrastructure including substitute teachers as valuable members of the school community.

This discovery calls for a shift in the treatment of substitute teachers by others. Educators who choose to accept the position as a substitute teacher do not deserve to be treated as second-class employees. Substitute teachers are not baby-sitters, should not be forgotten or seen as warm bodies while students have a “free” day. They should be recognized, respected and appreciated for their role in the education of the whole child. The profession should be cognizant of how their collective actions impact a substitute’s psyche. Whether done consciously or unconsciously is irrelevant. This reality exists for

a group of educators, that a school system cannot function without, to minimize any loss of instructional time. There is overlap and repetition in the literature with similarities and agreement in recommendations indicating an ongoing need for future research. More studies are published on the perceptions of substitute teachers about their own feelings, thoughts and opinions compared to the impact of training and how substitute teachers are regarded by school communities.

Educational leaders need to create consequences for the disappointing perceptions of marginalization and powerlessness. This deserves an immediate action to initiate reform efforts informed by historical research. Current and future studies with larger samples that parallel an area's population of substitute teachers in classrooms as instructional leaders could further identify implications and offer recommendations elevating this position within the field of education. An undeniable constant in schools world-wide is the work of a substitute teacher. To avoid unfilled teacher absences and gaps in learning, the role of the substitute teacher shares a similar goal of a permanent classroom teacher. Teachers shall build and sustain a classroom atmosphere that generates high expectations and enthusiasm for learning towards maximizing student achievement.

### **Experiences as Social Interactions**

As a substitute gains experience and familiarity with school/s, this will promote positive social interactions. However, truly little has been published about substitute experiences despite the time spent in school classrooms (Johnson, et al., 1988; Trotter & Wragg, 1990; Vorell, 2012). The mindset of a substitute teacher is to maintain continuity of learning for the students. During this classroom time, substitute teachers construct



knowledge about teaching and learning while performing their duties amongst other permanent teachers avoiding isolation (Duggleby & Badali, 2007). Efforts to perform well push a substitute teachers' learning forward through experiences in differing classrooms leading to their visibility among faculty (Bletzer, 2010). Recognition by others increases chances for social interaction and contributes to a substitute teacher's characterization of their classroom teaching experiences. Substitute teachers with strong social connections will translate that experience to their performance in the classroom. Substitute teachers are a population of educators who are readily available to serve, yet unimportant as workers. The purpose of this study will be to describe experiences of a substitute teacher with school administrators, teachers and staff to strengthen their social interactions.

### **School Community Engagement**

Access to the school community results from increased involvement over a period of time; potential for a substitute teacher is unlimited (Duggleby & Badali, 2007). When substitute teachers participate in school functions beyond the traditional school day, they exhibit an increased interest in the school community. Evening or weekend special events welcome additional support and substitute teachers as willing volunteers are welcomed and appreciated. During the school day during non-student contact time, substitute teachers may be asked to perform other tasks such as monitoring the halls, cafeteria, playground and/or arrival/dismissal areas. Assistance in the front office, media center or other gathering space may require the services of a substitute teacher. Anytime a substitute teacher extends him/herself to the school community, this strengthens the

working relationship. School community participation that steadily escalates aligns with social constructivist theoretical ideas.

Reflexive analysis identified feelings of dissatisfaction, alienation and powerlessness by the CRT if support as a substitute teacher by the community was lacking (Charteris et al., 2017). Casual teachers are expected to exhibit a pedagogical and relational expertise and transfer this from school to school with a limited knowledge about all members of a school community (Charteris et al., 2017). Without similar teaching experiences, substitute teachers feel lonely which is ironic since many permanent teachers were former substitute teachers (Duggleby & Badali, 2007). Loneliness as an outcome of substituting raises uncomfortable trepidations. To counteract feelings of loneliness or disconnect from school community members and focus on the positive experiences of substitute teachers is why it is important to conduct this study.

### **Importance of Substitute Teachers**

The perceptions of substitute teachers about their teaching experiences, impact of training, and school community engagement is found to align with a social constructivist theory to discuss teaching and learning as a collaborative process. Actions cause a substitute teacher to reflect on meaningful experiences to produce knowledge and skills. Teaching across various schools without permanency places the substitute teacher at a disadvantage if solely responsible for earning the respect of a school community. If turnover of substitute teachers is a concern, it is more advantageous for a community to be inclusive rather than exclusive. Substitute teachers are a valuable commodity in school systems and deserve acknowledgment accordingly.

Substitute teaching is a social interaction between adults to children and adults to adults. Substitute teachers are readily available to serve in the absence of a permanent teacher, yet often perceived as unimportant as workers by full-time school employees. Without full-time employment status, substitute teachers may be forced to compete for temporary assignments. Substitute teachers approach duties freely yet cautiously as defenseless subjects. This topic is worthy of creating a body of work that is long overdue for dedicated scholarship to expose how the conscious or unconscious behaviors of school community members adversely affect a substitute teacher.

### **Conclusion**

The literature contributes to the field of education by giving substitute teachers a voice and position worthy of respect as capable, competent professionals with the responsibility to deliver high quality instruction with effective classroom management. Research suggests that substitute teachers should be viewed as valuable educational capital (Lunay & Lock, 2006). Strength of this position includes the opportunity for college/university undergraduates through teacher retirees to work as a substitute teacher. A shortage of substitute teachers causes loss of instructional time, negative impact on student achievement, or no school available as a last resort (Shilling, 1990; Nidds & McGerald, 1994). It is a missed opportunity for school systems to expect professional behavior without a proper employment package to maintain a strong cadre of working substitute teachers due to the limited scholarly attention about the position. It is critical to accept that there is a difference between a permanent and substitute teacher. Historically, the literature indicates that substitute teachers are still viewed by many as

less than authentic with low expectations (Lunay & Lock, 2006). This is an unfortunate reality when the real work should be to raise their status.

The experiences of substitute teachers reflect personal perspectives worthy of study with results contributing to a body of knowledge spanning learning environments world-wide. Classroom settings could position substitute teachers' development and growth towards being instructional leaders and respected school community members. One's social context, either individually or with others, is shaped by past experiences informing the present. Through social interactions with ever-changing experiences, substitute teachers' professional practices are influenced by external occurrences. Future research studies, such as this one, are needed to determine what impacts a substitute's perceived role within an education system that entrusts their involvement with the world's most precious resource, our children.

By understanding the perceptions of substitute teachers through a review of the literature, a new direction to improve the work of substitute teachers is justified. Adequate initial training is needed for a substitute teacher to assume student supervision responsibilities, maintain effective classroom management, and follow lesson plans provided by the permanent teacher. This professional responsibility by the full-time classroom teacher to provide substitute teachers with all necessary information goes beyond one classroom of students. Each teacher, as a school system employee, works with peers, parents and the community in the continuous improvement of the educational experiences of students. Substitute teachers are stakeholders actively contributing to the role of the teacher. Implications from this study can uncover, design and implement another practical and sustainable pipeline into the teaching profession - experience as a

substitute teacher. There is no substitute for an optimistic, well-prepared, engaged substitute teacher.

### **CHAPTER 3: METHODOLOGY**

Training of substitute teachers has the potential to benefit recruiting, encourage stability within a district, contribute to improved relationships with school administration, faculty and staff, and increase the number of skilled substitute teachers in school classrooms. Research on substitute teachers dates back 40 years describing issues that are still present today (Duggleby & Badali, 2007). The literature review of 17 national and international peer-reviewed studies found the frequency of qualitative studies exceeds other methodologies to effectively study the experiences of substitute teachers. Little discussion exists on their perceived confidence and preparedness for the classroom, consequently strengthening the need for this study to capture perceptions directly from individuals working as substitute teachers. First-hand accounts lend credibility to the data and subsequent findings to inform the field of education on the realities of being a substitute teacher. This qualitative study intends to add to the field by exploring perspectives of new substitute teachers within their first quarter, or nine weeks, of a school year semester working in a Kindergarten through twelfth grade public school classroom having recently completed the District's required Substitute Teacher Training.

Schools are unable to operate without contributions of substitute teachers (Duggleby & Badali, 2007). As temporary teaching assignments change, substitute teachers exhibit adaptability and flexibility on a daily basis. Upon entering a classroom, substitute teachers neutralize any negativity due to the permanent teacher's absence. A substitute teacher's confidence in his/her instructional performance increases with

practice. By understanding the perceptions of these educators through a qualitative case study, a new direction to improve the work of substitute teachers was justified to bring awareness to their importance as thoughtful and capable instructional leaders and limit any negative impact on students. This led to adequate preparedness along with updates and revisions to improve the training design and delivery. Revisions to the design must continue to follow the methods and principles of andragogy (Knowles, 1980) for adult learning, thus recognizing substitute teachers as self-directed learners, responsible for their own decisions. It is essential to grow a strong cadre of substitute teachers to maintain the quality of education students receive throughout the school year and support the development of a pipeline of new educators. Lack of efforts will contribute to a shortage of substitute teachers causing further disruptions to an instructional school day.

### **Qualitative Inquiry**

Qualitative inquiry was the selected methodology for this study because it afforded the researcher an opportunity to capture personal feelings, behaviors, and perceptions (Creswell & Poth, 2018). It established an opportunity to expand answers or conversations about first-hand accounts of experiences. The specific approach was a case study. Pseudonyms were used in all references to the research site (East Coast School District) and title of the training (Substitute Teacher Training).

### **Research Questions**

To explore perspectives of new substitute teachers, three central research questions guided this qualitative case study. For the purpose of this study, the researcher defined a new substitute teacher as an educator working in a Kindergarten through twelfth grade classroom during an initial quarter, or nine weeks, of a school year

semester. In addition, four sub-questions were included for the first research question to separate experiences both in and out of the classroom:

1. What are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school?
  - a. How do new substitute teachers describe their classroom experiences?
  - b. How do new substitute teachers describe their experiences with administrators?
  - c. How do new substitute teachers describe their experiences with faculty?
  - d. How do new substitute teachers describe their experiences with staff?
2. What factors do new substitute teachers believe influence their confidence for instruction?
3. What do new substitute teachers perceive are the strengths and weaknesses of the required training?

### **Research Design**

This case study was significant and considered multiple perspectives (Yin, 1981) with new substitute teachers as participants who successfully completed a required substitute teacher training. It was bounded by established parameters (Creswell & Poth, 2018) defined by time, activity, and employment. These parameters justified that a case study was effective to explore different perspectives of substitute teachers' teaching experiences once training was completed and they worked in a public school Kindergarten through twelfth grade classroom. The parameter of time was nine weeks or one quarter within a school year semester; the completed Substitute Teacher Training was the activity and employment was working in a classroom as a substitute teacher. These



criterion justified that a case study was effective to explore different perspectives of substitute teachers' teaching experiences. This study's purpose and research questions were crafted to a case study. In-depth data collection included multiple sources of evidence using surveys, interviews, and artifacts (Yin, 1981).

This case study's design began with the Substitute Teacher Training for all eligible applicants. There were two data collection procedures for the qualitative methods following the training. The first involved the recruitment of participants for independent survey completion and if interested, the researcher scheduled an interview with a subset of the participants. Simultaneously, an analysis of artifacts included print or online published materials such as Substitute Teacher Handbook (Smith et al., 2016) and STEDI.org, a website that provides research-based training materials and services for substitute teachers. The other two artifacts were from the Substitute Teacher Training. One was the master PowerPoint presentation used by the facilitators to deliver the training and the second were the facilitator training notes. Therefore, more than one activity was conducted during the same timeframe of the study. There was a triangulation of data to check consistency of findings generated by the different methods used (Denzin, 1978) in the case study. A timeline established the specific schedule for data collection to describe and analyze the case study (see Appendix A).

### **Research Site**

The research site is one of the top ten largest school districts in the United States. During the 2019-2020 school year, the District served 267,970 students with 14,313 instructional personnel (<https://tinyurl.com/EastCoastSD>). It is an urban Kindergarten through twelfth grade public school system located in southeast Florida. The pseudonym,

East Coast School District (ECSD), was used to identify the study site. Prior to ECSD transitioning from on-campus school days to virtual learning due to the COVID-19 pandemic, there was a daily substitute teacher fill rate of 70-80%. This left 20-30% of all classrooms with a teacher absence without an assigned substitute teacher creating disruptions and hardships to other faculty and staff members.

The specific location for the Substitute Teacher Training before the COVID-19 pandemic was a district administrative building with a large training room conducive for adult learning. Amid the COVID-19 pandemic, online training was the recommended mode of delivery. In addition, ECSD was an appropriate research site for this case study because it was responsible for maintaining documentation, such as employment applications, academic transcripts, letters of recommendation and fingerprinting information. An electronic system, SmartFind Express, automated the process of teacher absence reporting and substitute selection. This system recorded all jobs accepted, declined, canceled after acceptance, or completed for qualified and eligible substitute teachers. The research site was the researcher's primary employer with convenient access to the training session, participants and active substitute teachers.

### **Role of Researcher**

The role of the researcher was to capture the perceptions of new substitute teachers following their initial experiences in classrooms. The researcher, an employee of ECSD for over 33 years was a former classroom teacher, school-based coach, district-based coach, and district administrator. The last 20 years were spent in professional development focused on teacher preparation, new teacher support and teacher leaders. The researcher was a member of the original design team charged to create a six-hour

training for potential substitute teachers. Over four years later, the researcher was the lead designer and facilitator of the trainings held throughout an academic school year. The researcher also assisted in the recruitment of substitute teachers. Researcher bias existed in the opportunity to capture data highlighting positive perceptions and effective preparedness following the training to influence a substitute teacher's performance in the classroom. Information about how the researcher mitigated this bias is addressed in the section on reliability and trustworthiness later in this chapter.

## **Participants**

The sampling strategy was purposeful based on participation criteria of training and work experience as a substitute teacher. This allowed the researcher to select subjects for the study “because they can purposefully inform an understanding of the research problem and central phenomenon in the study” (Creswell & Poth, 2018, p. 326). The researcher invited all individuals who completed the Substitute Teacher Training and met the eligibility requirements to work as a daily substitute teacher in ECSD. As active members of the District's substitute teacher pool, substitute teachers controlled the frequency, schedule and times of available work assignments accepted.

The training was available every three weeks with approximately 30-90 participants per session throughout a school year. After a session, the researcher emailed all participants following a recruitment script (see Appendix B) to invite substitute teachers to voluntarily participate. Requested contact information included full name and email address. Substitute teachers must have worked a minimum of 10 full school days, within their first nine (9) weeks of a semester as a daily substitute to participate. After working two weeks, this allowed participants time to develop thoughts and form opinions

to discuss and reflect on their experiences. The researcher requested a report from the research site for all participants who worked the minimum number of school days required for this study. All interested participants were asked to complete an online survey, then as many as 10 were interviewed with a video/phone conference. Since more than 10 participants agreed to be interviewed, the researcher randomly selected 10 from the pool of substitute teachers. A minimum combined total of 30 subjects for the survey or interview allowed for eliminating a substitute teacher who did not meet the work experience requirement. To motivate and maintain interest for further participation, an incentive of a \$10 eGift Card to Amazon or Target was given to each substitute teacher who completed an interview.

## **Data Collection Tools**

### **Online Survey**

An online survey was distributed to capture initial classroom experiences of new substitute teachers following the Substitute Teacher Training. The purpose of this survey was to capture perspectives of new substitute teachers after their initial nine-weeks of assignments in a Kindergarten through twelfth grade classroom. Survey responses were used to answer all three central research questions and the sub-questions. Questions from a completed nation-wide self-efficacy study were adapted with permission from the Substitute Teacher Division of STEDI, LLC (STEDI.org) licensed by Utah State University for this survey. The survey was created using the Qualtrics XM platform (<https://fau.az1.qualtrics.com>), a survey software to gather data and create reports. The first six (6) questions collected demographic information from each participant to illustrate academic and professional backgrounds of those who pursued the position of a

substitute teacher. The remaining 13 items required short answer responses (see Appendix C).

All survey questions were piloted with a group of 10 new substitute teachers in the spring of 2020 and slightly revised for this case study based on participant responses. The revisions included the elimination of three questions that were either redundant or about an activity that was not experienced, such as asking good questions during an instructional lesson. Three questions were added that collected responses addressing research questions two and three. Participants were asked to describe their interactions with school administrators, faculty and staff. A question about what topic from the training was most useful was on the piloted survey with two additions. Participants were asked “what topic from the training was the least useful for you?” and “what recommendations do you have for future topics?” on this survey. Participants received a link to the online survey via email after their initial nine (9) weeks of working as a substitute teacher in any school, grade, and classroom within ECSD. The survey was confidential.

### **Semi-structured Interviews**

Ten one-on-one semi-structured interviews were scheduled. Interviews were the most appropriate qualitative method because they had a laser focus on the topic of the case study and were insightful by providing spontaneous responses (Yin, 1981). The purpose of the interviews allowed questions to be asked and answers to be collected during a personal conversation. However, due to any health or safety concerns amid the COVID-19 pandemic, a recorded video meeting (with or without use of webcam) using Microsoft Teams was a viable option. Interviewees were recruited following a script (see

Appendix D) sent as a follow-up email to the volunteers willing to participate further in this study and reminded of the requirement of working at least 10 full school days prior to scheduling the interview. Phone numbers were requested when an interview date and time were confirmed individually with each participant via Microsoft Bookings. Semi-structured interviews of about 30 minutes in length were conducted after their initial nine (9) weeks of working as a substitute teacher to hear first-hand accounts of the participant's experiences. Based on responses given, interviewees were prompted to offer clarifications. Length of time for each interview was flexible to allow for complete responses and expanded answers for questions ranging from 13 to 35 minutes. Immediately following each interview, the researcher purchased a \$10 eGift card based on the participant's preference of Amazon or Target and had it sent to their preferred email address.

Predetermined well-constructed questions were asked following a protocol for the guided conversation (see Appendix E). Interview questions were adapted with permission from the Substitute Teaching Division of STEDI, LLC (STEDI.org) licensed by Utah State University. All were selected to provide perspectives addressing all three research questions. Seven of the interview questions were piloted with a group of four new substitute teachers in the spring of 2020 with two revised for this case study. Revisions shifted the focus to capture descriptions about their own confidence when walking into the classroom before the school day begins and continuing the learning while the permanent teacher is absent to address research question two. A three-part question was added to hear about how they interacted with school administrators, faculty and staff to focus on the sub-questions for research question one. Since interviewees

completed the online survey, the interview questions about social interactions focused on their choice of actions and how they interacted compared to the survey questions that asked for a description of interactions with each group (school administrators, faculty, and staff). An eleventh question was added from the original list of ten to ask, “to what degree did the training you received increase your confidence level? This question focused on the training as a factor to increase confidence for the researcher to hear about the benefits and deficiencies of their preparedness. The final four (4) questions collected demographic information from each participant to illustrate academic and professional backgrounds of those who pursued the position of a substitute teacher. Confidentiality was maintained for interviewees.

### **Artifact Analysis**

Artifact analysis was conducted to further understand the content and resources of the training for new substitute teachers. The analysis examined the role or significance of the materials in contributing to a participant’s level of confidence as a substitute teacher and/or perception to the training that addressed research questions two and three about the perceived strengths and weaknesses of the required Substitute Teacher Training. An artifact analysis protocol (see Appendix F) described information for each primary or ancillary artifact. Artifacts included the Substitute Teacher Handbook (Smith et al., 2016), master PowerPoint presentation, facilitator training notes, and the STEDI.org website.

ECSD purchased the Substitute Teacher Handbook (Smith et al., 2016) for each participant and sent the book to training participants via the United States Postal Service. Two of the artifacts, the master PowerPoint presentation and facilitator notes, were

created by the training facilitators independently and then each was combined into one complete version by the researcher. It was an expectation that the Substitute Teacher Handbook (Smith et al., 2016) and the STEDI.org website were referenced during the training and served as ongoing resources for substitute teachers. ECSD purchased and produced items intended to guide and reinforce the facilitation of the training and contribute to the skill set and knowledge acquisition of the new substitute teachers.

### **Data Collection and Analysis**

Data collected to understand the phenomena of substitute teacher perspectives was effectively organized and managed prior to determining how to do the analysis. To illustrate how all methods connected to each central research question, a data crosswalk (see Appendix G) was created by the researcher to ensure all survey questions, interview questions, and artifacts addressed the central research questions and sub-questions for this study. All confidential survey response reports, interview transcripts, and artifact summaries were maintained and managed electronically. A unique password created by the researcher was needed to access the data. A free and open source qualitative research tool for all operating systems, Taguette (Rampin et al., 2019), was used to import all reports, transcripts and summaries with the capability to highlight text with applicable codes. This online tool organized the data for open coding to identify categories and themes. A theoretical framework crosswalk (Appendix H) explicitly identified codes informed by theory. All data were read and reviewed by highlighting important phrases and sentences to discover connections to each research question. The highlighted text formed themes used to code the data. At least two rounds of coding were completed. A third round of coding was possible if saturation of the data (Merriam & Tisdell, 2016)



was not reached. The coded text guided analysis to describe themes leading to emerging findings. The findings informed conclusions and recommendations of this case study.

### **Online Survey**

The online survey was available to participants without restricting access. Participants were notified and encouraged to complete the survey after one week and again after two weeks of the original request. Qualtrics (<https://fau.az1.qualtrics.com>) provided a distribution summary including audience size (number of participants), surveys started and responses (completed surveys). The researcher sent an email after the first week to kindly remind participants to complete the survey and the importance of their responses. All recorded responses completed through Qualtrics (<https://fau.az1.qualtrics.com>) were created as reports. An available report format was a list of all ten open-ended questions followed by all answers. This data report was downloaded, saved as a Word document and uploaded to Taguette (Rampin et al., 2019) for coding. The demographic information on the background of each participant was charted to illustrate the composition of this study's participants.

### **Semi-structured Interviews**

The researcher listened to the personal experiences as described by the new substitute teacher in their own words with reflexivity (Merriam & Tisdell, 2016). In the role of the researcher, this means to be conscientious of any preconceived notions or assumptions about the experiences or perspectives of substitute teachers and to take these into account during the data analysis. The interviews between researcher and participant were video and/or audio recorded and transcribed using Microsoft Teams. Microsoft

Teams has a transcription feature that captured spoken words from video and/or audio recorded conversations in real time. It had the capability to distinguish between speakers, thus separating the text person by person. The full transcript was downloaded as a Word document. A review of the transcript revealed errors in word usage or speaker match. Corrections were made on the document following multiple replays of the audio recording. All documents were uploaded to Taguette (Rampin et al., 2019) for coding.

The semi-structured interviews captured data that addressed all three research questions for the researcher to hear first-hand accounts of experiences within the classroom, with school administrators, faculty and staff. In addition, the answers revealed the factors that influenced confidence as a substitute teacher. Finally, questions directed to the required training acknowledged strengths or benefits while exposing missed opportunities or weaknesses. This feedback may be used to inform the training facilitators of potential improvements to the design of the session.

### **Artifact Analysis**

All four (4) artifacts (a handbook, website, PowerPoint presentation, and facilitator notes document) were reviewed individually resulting in an organized summary with all information collated into a single document. All print items, including the Substitute Teacher Handbook (Smith et al., 2016) and website, STEDI.org, were intended to provide a foundational level of understanding about the role of a substitute teacher. The master PowerPoint presentation and facilitator training notes included details on the training design, flow and format of the session. The analysis examined the role or significance of the materials to a substitute teacher's level of confidence with instruction and/or reaction to the training to answer research questions two and three. In

addition, during the analysis of survey and interview responses, references to the artifacts were revealed.

### **Coding Process**

Analysis of the collected qualitative data followed a constant comparative method with multiple rounds of coding that compared data according to each category, integrated categories, and set limits before identification of the findings (Glaser, 1965). It is important to note that these findings represented only the particular new substitute teachers in this study's participant sample group.

The use of Taguette (Rampin et al., 2019) was utilized as an online repository of collected text data from surveys, interviews and artifact summaries with the capability to highlight text and label with corresponding codes or tags. By reading and reviewing all data, keywords, and phrases that appeared more than twice suggested a pattern (Saldana, 2016) and were identified and used to create the themes for coding. Each code consisted of two to four capital letters matching the theme. All themes, definitions and codes developed a master code list. An a priori code list (Appendix I) was created to provide examples of codes. Some of the data were double or triple coded. Coded text was sorted into sections carefully aligned to each theme. The themes that elicited the highest number of codes created categories. Each theme's group of highlighted entries were able to be downloaded in multiple formats to accommodate the researcher's preferences. The data were revisited in its entirety to synthesize ideas aligned to the research questions.

A fellow doctoral candidate was invited and added as a peer coder that contributed to the interrater reliability of the coding. The researcher consulted with the peer coder (Merriam & Tisdell, 2016) to ensure familiarity of the theories and manner of

coding. A work plan was created and followed for the peer coder to independently code a portion of the data. The plan began with a virtual meeting to review the a priori code list with definitions and process for coding. Agreements were made that codes for theories (adult learning principles [ALP], self-efficacy [SE] and social constructivism [SC]) could be used together with a non-theoretical framework code. Uncoded data was shared electronically with the peer coder as word documents. Included were all survey responses and half of the interview transcripts selected randomly. The peer coder completed the coding using track changes on a Word document by highlighting text and adding a comment with selected code or codes. In a post discussion about the process, for the first round of coding, the peer coder focused on all the non-theoretical framework codes, or the ones for ALP, SE, and SC. For the second round, the peer coder specifically coded for the theoretical framework since familiarity increased with the data and process. Upon completion, the researcher compared each set of coding and identified the coding that was different. An interpretation of the emerged themes from the collected data followed. Final selections led to key findings that represented the perspectives of the new substitute teachers that participated in this case study.

### **Reliability and Trustworthiness**

This case study was reliable and trustworthy through the collective use of data collection tools and procedures. The feedback was only from the invited participants. The researcher maintained electronic logs and journals throughout the study. Analytic memos were written by the researcher that guided the progress of the study and provided a detailed outcome of the process implemented, leaving an audit trail. Protocols were created for the online survey, semi-structured interview and artifact reviews. The

researcher also worked with a peer coder, a fellow doctoral candidate, to increase trustworthiness.

A pilot of this case study was conducted in the spring 2020 with a total of 10 participants who volunteered to complete the online survey or be interviewed during a phone conference. In addition, previous versions of the artifacts were analyzed during the pilot study. All artifacts, except the Substitute Teacher Handbook (Smith et al., 2016), were updated due to the COVID-19 pandemic, reflecting the necessary adjustments to the job responsibilities of a substitute teacher. In ECSD, substitute teachers were required to report to school buildings, no virtual substitute teachers were being hired during virtual instruction of students.

Verbatim quotes were captured from the surveys and interviews to support themes added validity or trustworthiness. As previously discussed, the inclusion of a peer coder for interrater reliability ensured trustworthiness of this case study. It is imperative to recognize that the findings and conclusions of this case study cannot be generalized for all substitute teaching experiences that exist world-wide. When the permanent teacher is absent, the goal is for the students and substitute teacher to have a productive day.

### **Limitations**

A limitation of this study was that observations of the substitute teachers' actions in a Kindergarten through twelfth grade classroom during a school day were not conducted due to the research site not approving in person research. The sample size of participants was limited to the number of individuals who applied and were processed as eligible to accept assignments as a substitute teacher within the study's timeline.

Establishing a timeframe of one quarter or nine-weeks of work within a school year semester as a substitute teacher limited the amount of experiences available for this study.

### **Delimitations**

The exclusion of substitute teachers electing to work in a charter and/or private school was a delimitation. Both education systems had their own eligibility and application processes separate and apart from ECSD. Perceptions of substitute teachers' teaching experiences by school administrators, teachers, staff and/or students were also omitted.

### **Summary**

Substitute teachers organize the classroom as a learning environment and instruct students in the absence of the regular teacher. An expectation placed on substitute teachers is to ensure learning experiences continue (Duggleby & Badali, 2007); however, this charge may exceed their necessary preparation. Three central research questions and four sub-questions guided this case study. First, what are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school? Sub-questions for research question one focused on how new substitute teachers describe classroom experiences and experiences with administrators, faculty and staff. Second, what factors do new substitute teachers believe influence their confidence for instruction? Third, what do new substitute teachers perceive are the strengths and weaknesses of the required training? This case study explored perspectives of new substitute teachers recently trained in a public school system. An online survey, semi-structured interviews, and artifact analysis captured data. The data were coded and analyzed to discover

connections and answer the research questions. Findings uncovered another practical and sustainable pipeline into the teaching profession – experience as a substitute teacher.

There are no substitutes for an optimistic, well-prepared, engaged substitute teacher. By understanding the perceptions of new substitute teachers from this study, a new direction improving the work of this instructional position was justified.

## **CHAPTER 4: RESULTS**

This case study explored perspectives of 32 new substitute teachers recently trained in a public school system. An online survey, one-on-one semi-structured interviews, and artifact reviews captured data. Online tools including Taguette and Microsoft Teams organized data for analysis to discover connections and findings to answer each research question.

### **Purpose of Case Study**

To address the identified problems and shortage of substitute teachers, the purpose of this case study was to understand and identify the challenges during their initial classroom experiences following the Substitute Teacher Training in ECSD. Next was to identify and understand training needs contributing to their preparedness, confidence, and professionalism. Training provided opportunities for substitute teachers to discover and create a personal repertoire of strategies and techniques for an assigned learning environment. Finally, suggestions to improve the design of the training were identified. These initial classroom teaching experiences took place within one quarter or nine weeks of a school year semester between the dates of January 28, 2021 to June 9, 2021.

The substitute teachers' personal perspectives and self-reported level of confidence have the potential to inform educational leaders about their role to minimize loss of instructional time while maximizing student achievement. To explore



perspectives of new substitute teachers, three main research questions and four sub-questions guided this case study:

1. What are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school?
  - a. How do new substitute teachers describe their classroom experiences?
  - b. How do new substitute teachers describe their experiences with administrators?
  - c. How do new substitute teachers describe their experiences with faculty?
  - d. How do new substitute teachers describe their experiences with staff?
2. What factors do new substitute teachers believe influence their confidence for instruction?
3. What do new substitute teachers perceive are the strengths and weaknesses of the required training?

### **Research Methodology**

Qualitative inquiry allowed for the study of personal first-hand descriptions of classroom experiences, social interactions and training participation. It was bounded by time, activity and employment. The parameter of time was nine weeks of a semester within a school year, the completed Substitute Teacher Training was the activity and employment was working in a classroom as a substitute teacher for a minimum of 10 full school days. The case study began with ECSD's required Substitute Teaching Training. Participants were recruited from the subgroup of completers who accepted job assignments to work in a Kindergarten through twelfth grade classroom. The first sample group was recruited and completed an online survey. From the sample of survey

completers, a subgroup of participants were recruited for one-on-one semi-structured interviews. All participants met the established criteria of employment, training, and actual workdays as a substitute teacher. The minimum of 10 full school days with hours worked was verified by ECSD. Ten (10) full school days is equivalent to two weeks of work as a substitute teacher allowing for a minimum amount of time to develop personal thoughts about their experiences. Simultaneously, all artifacts were analyzed. Artifacts included the Substitute Teacher Handbook (Smith et al., 2016), Master PowerPoint Presentation, Training Notes, and STEDI.org website.

The research site, ECSD, pivoted to full-time online teaching and learning as of March 13, 2020 in response to the nation's shutdown due to COVID-19. This marked a significant reduction in the daily need for substitute teachers. There was an immediate halt on hiring any new individuals to work as substitute teachers. All efforts were focused on the transition to virtual instruction for students. The District was still experiencing teacher absences; however, the need for daily substitute teachers reduced significantly since teachers were working remotely and able to teach from their homes. ECSD remained with virtual instruction through the opening of the 2020-2021 school year. As schools reopened in late fall and welcomed students back to campus, the only jobs for substitute teachers was to report to a school location. ECSD resumed accepting applications to be a substitute teacher in October 2020 after a seven month hiatus amid the pandemic. The Substitute Teacher Training resumed in December 2020 allowing new substitute teachers to begin accepting assignments in January 2021. From January – May 2021, ECSD welcomed 154 new substitute teachers who accepted the condition of employment to work in person with students present in school classrooms.

Submitting a research request to ECSD's Institutional Review Board (IRB) required an extended time for review and subsequent approval for two major reasons. Due to the COVID-19 pandemic, all in-person research was suspended without a definitive date to return to in-person activities. Therefore, no researcher was permitted on school campuses. All activities were conducted online in a virtual environment. Secondly, ECSD Policy #6313 states that proposed research should not conflict with District and state mandated testing or other district and school operations. The spring testing window began on April 5, 2021 through the last day of school on June 9, 2021. For the timeline of this study, the missed opportunity for in-person research and an extended testing window resulted in a longer timeline for IRB approval. In mid-March, ECSD experienced a serious data breach suspending online IRB submissions due to a corrupt pathway. Prior to receiving approval on June 23, 2021, a total of two revisions to the proposal to conduct research were required to ensure compliance with no in-person classroom observations and no in-person interviews during a substitute teacher's 7.5 hour workday. Although in-person research on campus was not being approved by the university, this did not interfere with the IRB submission and approval process for this study in a public school system. Both IRB applications were submitted in mid-March with the first approval from the university received on April 9, 2021 and from the research site on June 23, 2021.

### **Participants**

For this case study, a minimum of 30 participants were needed to complete the online survey. For the one-on-one interview, a subset of 10 out of the 30 participants who completed the online survey was the expected sample. A source of data dependent

on ECSD records was a report generated from SmartFind Express to verify a substitute teacher's number of full days worked in a school. A request was made through a department's director to the human resources specialist/substitute teacher district coordinator to run the report following the study's criteria. Information needed were the names and email addresses for all substitute teachers who successfully completed ECSD's Substitute Teacher Training between January – May 2021 and worked a minimum of 10 full school days in a Kindergarten through twelfth grade classroom. The report was prepared as an Excel spreadsheet including the following information: email address, first name, last name, and Substitute Teacher Training date. A sample of 75 people were identified as potential participants for this study. This represents 49% of the 154 new substitute teachers to ECSD.

### **Recruitment**

To recruit participants, individual emails were distributed using a Qualtrics (<https://fau.az1.qualtrics.com>) function. The study's recruitment script was entered as text and sent directly to the email addresses of the 75 potential participants. After the initial distribution of the survey, three (3) reminders were emailed via Qualtrics (<https://fau.az1.qualtrics.com>) to voluntarily participate within the survey's open period of 16 days. Due to the Fourth of July holiday falling within the survey's open window, an accommodation was made to send a third reminder and allow for two additional days to access the survey. A spike in completions was observed after each reminder, yet the days that followed yielded minimum submissions. A total of 44 surveys were started with 32 completed. This total represents two (2) more than required as part of the study. Participants were permitted to skip questions as per the recruitment script. With the

option to leave an answer blank, partial surveys with over 50% completed could have been included in the final count of responses. As a result of the last notice, the substitute teachers with a majority of questions answered chose to finish and submit the survey. The final question on the survey was an invitation to participate in a one-on-one interview. With a sample of 10 participants needed as interviewees, the survey remained open for just over two weeks (18 days) until at least 10 substitute teachers volunteered and scheduled a time to be interviewed.

### **Survey Participants**

Demographic information was collected from the survey participants. This data illustrated the characteristics from a sample of new substitute teachers. Participants self-reported on gender, age by decade, if they held a bachelor's degree and if so, added the name of the major. They were also asked to identify about experiences such as current undergraduate student, teaching experience, substitute teaching experience, military and/or first-responder. If none of those categories fit, the option of "other" allowed them to type in their employment experience. As noted in Table 2, participant ages ranged from 18 to over 60 years old, with all age decades represented. Interestingly, the largest age decade was 40-49. Many more females participated than males. Participants identified as either White or Black with a majority being non-Hispanic. One participant chose not to respond to indicate if he/she was Hispanic or Non-Hispanic. Of the 32 participants, nearly 47% hold a Bachelor's degree. All participants successfully completed ECSD's Substitute Teacher Training between the dates of January – May 2021, earning eligibility to work as substitute teachers in Kindergarten through twelfth grade public school classrooms.

**Table 2***Demographics of Survey Participants*

Gender		Age					Race			Degree	
Male	Female	18-29	30-39	40-49	50-59	60+	White	Black	Hispanic	Non-Hispanic	Bachelor's
5	27	7	7	10	4	4	19	13	8	23	15
32 Responses		32 Responses					32 Responses			31 Responses	32 Responses

**Interview Participants**

A total of 14 participants expressed an interest to voluntarily participate in a one-on-one semi-structured interview. The intent to interview participants who completed the survey was deliberate for this qualitative study to understand how substitute teachers characterize their experiences, how they construct their environment and how their perceptions contribute to their performance (Merriam & Tisdell, 2016). Since more than 10 participants voluntarily expressed an interest to be interviewed, it was necessary to randomly select names. Wheelofnames.com is a free, easy to use website that uses a list of names and randomly rotates them before decelerating to a stop. This virtual wheel was clicked to spin 13 times to allow all names to be placed in order from 1 to 14. In the event one of the top 10 participants either declined the invitation to be interviewed or neglected to respond to the invitation, number 11 on the list was recruited with an invitation for an interview. This process continued for two weeks. Email reminders encouraged participation in support of their initial willingness to be interviewed. All 14 participants were eventually contacted to arrive at the needed sample size of 10 for this

study and received the incentive of a \$10 eGift Card to Amazon or Target for participation.

Email addresses for the 10 substitute teachers was provided in the final question on the survey about continued participation in the study. To avoid scheduling challenges and numerous email exchanges to secure a day, date and time for an interview, an online tool was used. Microsoft Bookings is a scheduling tool affording appointments to be made based on mutual availability. Once the Booking page was created by the researcher, a link was shared with the participants. The online calendar displays available days, dates and times for which the recipient can select and book him/herself for that timeslot. Once the interviewee enters his/her contact information, an automatic email confirmation is sent including the Microsoft Teams meeting link. Appointments can be canceled or rescheduled online based on calendar availability by the interviewee. Microsoft Bookings has features that allow for an automatic email reminder the day before and day of the appointment to minimize no shows. For this study, all 10 interviews were conducted on the day, date and time selected by the interviewee based on the researcher's calendar of availability. Despite a few technical issues of joining the Microsoft Teams meeting link, minimal troubleshooting resolved any issue and allowed for all 10 interviews to be conducted when booked. No rescheduling was necessary.

Since the participants are a subgroup of the survey participants, the demographics reflect the same major categories asked on the survey. Included were gender, age by decade, race, and education degree. As listed on Table 3, if participants held a bachelor's degree, a further question inquired as to their choice of major. The interview protocol included the opportunity to learn if a participant was: currently enrolled in a College of

Education and/or Student Teacher, former classroom teacher, retired classroom teacher, substitute teacher with prior substitute teaching experience, active or retired military, active or retired first-responder. All but one responded with a different option, and she was a former classroom teacher.

**Table 3**

*Interview Participants*

Gender	Age	Race	Major of Bachelor's Degree
1. Male	60+	White/Hispanic	International Business
2. Female	40-49	White/Non-Hispanic	Secondary English Education
3. Female	30-39	Black/Non-Hispanic	Fine Arts/Interior Design
4. Female	50-59	Black/Hispanic	Dance/Ballet
5. Female	18-29	Other/Hispanic	Photography
6. Female	18-29	Black/Non-Hispanic	Animal Science
7. Female	40-49	Black/Non-Hispanic	Associate's Degree
8. Female	18-29	Black/Non-Hispanic	Interdisciplinary Studies
9. Male	60+	White/Non-Hispanic	Advertising
10. Female	18-29	Black/Non-Hispanic	English

**Data Collection**

Online surveys were distributed to capture initial classroom experiences of new substitute teachers following the Substitute Teacher Training. Questions from a completed nation-wide STEDI self-efficacy study were adapted with permission for the



survey. A protocol guided the process for the online survey. The 19-item survey was created using Qualtrics (<https://fau.az1.qualtrics.com>), a survey software to gather data and create reports. The first six (6) questions collected demographic information and the remaining 13 items were multiple choice or short answer responses. Participants received a link to the survey via email after working a minimum of 10 full work days as a substitute teacher in any school, grade, and classroom within ECSD. Two weeks allowed time for experiences, to develop thoughts and form opinions. The survey was anonymous, and each substitute teacher was highly encouraged to voluntarily participate, but not required to complete and submit. Participants also had the option to skip questions without penalty and no incentives were given for participation.

With a few quick volunteers for interviews after the survey's initial distribution, an email was sent 10 days later to thank the participants for their interest and willingness to continue in the study and that additional details about scheduling an interview would be emailed to them following the close of the survey. Interviews could not be scheduled prior to the survey end date to allow all 75 eligible participants an opportunity to participate. These interviews were conducted in order to hear first-hand accounts of a new substitute teacher's experiences.

Semi-structured interviews ranged from 13 to 35 minutes in length. Each participant answered all of the questions. The interviews were originally to be scheduled face-to-face at a school location. However, due to a decision by ECSD to suspend in-person research on a school campus, all interviews were conducted via a Microsoft Teams meeting following an interview protocol. Similarly to the survey, questions from

a completed nation-wide STEDI self-efficacy study were adapted with permission for the interviews.

Conversations between researcher and interviewee were audio recorded and transcribed simultaneously using features available within Microsoft Teams. Once the interview was over and the recording stopped, the video saved as an .mp4 file and the complete transcription saved as a .docx file were available within Microsoft Teams. This eliminated the need to utilize more than one online tool to capture the full interview. Six (6) interviews were conducted with webcams and four (4) were audio only. Each interview closed seeking the participant's choice of incentive, a \$10 Amazon eGift Card or a \$10 Target eGift Card. It was advantageous to offer a choice since 50% chose Amazon and 50% chose Target. Each eGift Card was sent to the preferred email address and confirmation of receipt was received for all 10 participants.

Artifact analyses were conducted to further understand the content and resources of the training for new substitute teachers. An artifact analysis protocol captured five different pieces of information for each artifact. For each artifact, the name of the artifact, date received, website (if applicable), detailed description and significance was collected. The four items selected for the artifact analysis were easily and readily available. All items are necessary for the Substitute Teacher Training. The Substitute Teacher Handbook (Smith et al., 2016) and STEDI.org website are ongoing resources for the participants and served as primary sources for the content included in the master PowerPoint presentation. The combination of purchased items and those produced by ECSD supports the facilitation of the Substitute Teacher Training and contributes to the skill set and knowledge acquisition of the new substitute teachers.

Throughout the collection of data, electronic logs and journals were maintained by the researcher. If hand-written notes, analytic memos, or additional documents were used, then scanned copies were added to the password protected electronic files. All interview consent forms, Microsoft Bookings notices, and eGift Card receipts were kept electronically.

### **Data Analysis**

The study's theoretical framework of andragogy, self-efficacy, and social constructivism was the structure that informed the data collection to data analysis. It also provided focus to organize the coding process. A subset of codes was created for each of the theories and aligned to each of the central research questions. For research question one about initial experiences of new substitute teachers in the classroom with students and in schools with administrators such as a principal or assistant principal, teachers on the faculty, and staff comprised of non-classroom or non-instructional employees, the three codes for social constructivism:

- Social Constructivism:
  - SI: Social Interactions or behaviors between adults and children
  - LRG: Learning by doing or job-embedded learning
  - REC: Recognition by others contributing to experiences

The factors that substitute teachers believed influenced their growth and self-confidence with instruction was captured in research question two and included the codes for all four principle sources of information of self-efficacy were included. An overlap occurred with the addition of one code for social constructivism for the second research question.

- Self-Efficacy Principle Sources of Information:

- PER: Performance accomplishment through practice to gain relevant experiences
- VIC: Vicarious experiences through observing others modeling a task
- VER: Verbal persuasion is positive encouragement by someone perceived as credible
- PHY: Physiological states that influence or decrease confidence to perform tasks
- Social Constructivism
  - REC: Recognition by others contributing to experiences

Finally, to improve a training design, feedback from participants assisted in the identification of the training's strengths and weaknesses that answered research question three as noted below.

- Adult Learning Principles:
  - ALP1: Adults need to learn through experiences that resemble real-world experiences
  - ALP2: Adults learn best with an immediate connection that is relevant to their work

A constant comparative method was followed with at least two rounds of coding. A priori codes identified patterns. Themes and categories emerged from a synthesis of ideas organized to align to all three central research questions and sub-questions. A peer coder joined for interrater reliability of coding. Finally, the key findings represented an interpretation of the collected data.

All survey response reports, interview transcripts and artifact analysis protocols were maintained and managed electronically. An online tool, Taguette, organized the data for coding to identify categories and themes. All data were read and reviewed by highlighting important phrases and sentences to discover connections to each research question. The highlighted text formed themes used to code the data. Three rounds of coding were completed. The coded text was collapsed into categories and themes that guided analysis leading to emerging findings (see Appendix J).

From the group of 75 eligible participants, thirty-two (32) online surveys were completed through Qualtrics (<https://fau.az1.qualtrics.com>) representing a 43% response rate. This exceeded a typical 25% response rate on surveys to “get the minimum necessary number of responses for a sufficient level of accuracy” (Sinickas, 2007, p. 11). When the survey closed, a default choice for a report was downloaded and saved as a Word document. The report included all answers organized question by question. The design of the survey allowed for participants to answer the first six (6) multiple choice items that collected demographic information. Of the remaining 13 items, three (3) were multiple choice questions, eight (8) short answer questions and two (2) as fill-ins about topics from the Substitute Teacher Training. This composition and number of items maintained a reasonable amount of time and effort to complete the survey.

To analyze survey results, the report generated by Qualtrics (<https://fau.az1.qualtrics.com>) displayed responses to the multiple choice items numerically. For each of the three multiple choice questions, simple statistics calculated the mean, standard deviation and variance. For this study, only the percentage of participants who selected a particular choice for each item was analyzed to supplement

the open-ended responses. The downloaded report as a Word document with all of the open-ended question responses was uploaded into an online tool, Taguette (Rampin et al., 2019). Three rounds of coding were completed on the data. Responses were limited, not by survey design, but to the level of detail provided in a response. If there was a lack of interest by the participant, then items were skipped. An additional consideration stems from a new substitute teacher's perception of public opinion about their role in a school. To further minimize the potential for survey fatigue (Sinickas, 2007), the recruitment script noted benefits of participation, that the survey was for a research study and included all 75 eligible participants and not a random sample.

Although the opportunity existed for a participant to recognize the researcher as one of the trainers from the Substitute Teacher Training, only two (2) of the 10 verbally acknowledged the connection. This low occurrence was possible due to the researcher's limited screen time during the training session. Only one hour divided into two non-sequential 30-minute presentations by the researcher was done during the four-hour virtual training. Without additional recognitions, and full disclosure by the researcher that participation was not connected to any work potential work assignments as a substitute teacher, honest responses were possible.

The length of time for an interview ranged from just over 13 minutes to nearly 35 minutes. The total combined time for all interviews was just under four (4) hours. Each of the 10 one-on-one interview transcriptions assisted in locating each question and response that followed. All text was labeled with full name of speaker to clearly indicate what the researcher or participant verbalized throughout the conversation. All occurrences of full names were changed to initials for the coding process. During a

viewing of the video interview or listening to the audio recording, corrections were made to the transcription to accurately capture the spoken word. This eliminated errors in word usage or speaker match. Hearing personal accounts of experiences reflected this moment in time for each new substitute teacher. Although they work under the same job title, their view of the position evolved into individual perspectives that impacted their words and actions.

All four (4) artifacts were reviewed individually resulting in an organized summary with all information collated into a single document. All print and online items were appropriate for providing a foundational level of understanding about the role of a substitute teacher. The master PowerPoint presentation and facilitator training notes were seamless and cohesive. The design maintained a flow of content combined with participant engagement.

A free and open source qualitative research tool for all operating systems, Taguette (Rampin et al., 2019), was used to import each Word document with all participant responses and artifact summaries. By reading and reviewing all data, coding was completed using a list of 26 a priori codes. Taguette, as an online tool, has the capability to highlight text and label with corresponding codes or tags. Each code consisted of two to four capital letters matching the a priori code list with definitions. After the first round of coding, five new codes were created (see Table 4) specifically to address each of the central research questions.

**Table 4**

*New Codes Developed After First Round of Coding*

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Classroom Experiences: Situations with full classroom of students	CEX
Confidence of Substitute Teacher: Self-reported awareness of confidence	CON
Substitute Teacher Training: Strengths of required training	STTS
Substitute Teacher Training: Weaknesses of required training	STTW
Substitute Teacher Training: Recommendations for future trainings	STTR

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As a result of some data being double- or triple-coded, five of the codes on the original list were not used. No data were identified about classroom setting (CS) or a participant's impression of the physical room/space on a school campus. The classroom (CM) code for situations with a full classroom of students was too broad. The final three eliminated codes aligned to the study's theoretical framework, ALP for adult learning principles, SE for self-efficacy, and SC for social constructivism as a big code family. It was more advantageous to use the codes that specified the element of the theory in its connection to the data. Therefore ALP1 and ALP2 represented the first and second adult learning principles. For self-efficacy, PER, VIC, VER and PHY referred to the four principle sources of information: performance accomplishment, vicarious experiences, verbal persuasion, and physiological. Social constructivism was identified through the use of SI for social interactions, LRG for learning, and REC for recognition.

A further analysis of the data were completed by a peer coder, similar to a "*peer examination or peer review*" (Merriam & Tisdell, 2016, p. 249). Peer coder is the more applicable term for this study since she is a fellow doctoral student. An initial virtual meeting provided an opportunity to discuss the role of a peer coder and to review the list



of a priori codes and definitions. There were initial agreements that text could be labeled with more than one code and the potential overlap of codes with similar definitions. For instance, references to the Substitute Teacher Training may also match either one of the adult learning principle codes. There is a connection between performance accomplishment with self-efficacy and learning by doing from the lens of social constructivism. Finally, verbal persuasion and recognition demonstrate commonality between the theories of self-efficacy and social constructivism.

Uncoded data were shared electronically with the peer coder as word documents. Included were all survey responses and half of the interview transcripts. The interview transcripts were randomly selected utilizing the same online tool, wheelofnames.com, to prioritize the list of potential interviewees. Coding was completed through track changes on a Word document. The peer coder highlighted text and added a comment with the selected code or codes. In a post discussion about the process for the first round of coding, the peer coder focused on all of the non-theoretical framework codes listed on the a priori code list. For the second round, the data were coded using the theoretical framework codes or the ones on adult learning principles (ALP1, ALP2), self-efficacy (PER, VER, VIC, PHY), and social constructivism (SI, REC, LRG). The familiarity with the data for the second round increased understanding and ability to code effectively. This review strengthens the consistency and dependability (Merriam & Tisdell, 2016) when at least two different people agree on the coding.

Upon review of the coding for the survey responses, the peer coder coded 46 lines of text with a total of 48 codes (two were assigned double codes). This was slightly more than the researcher's 40 coded lines resulting in a difference of six lines of text coded.

Using simple statistics, the smaller number of 40 was divided by the larger number of 46. The quotient was 0.869, rounded up to 0.87 and converted to a percentage. This equated to an accuracy rate of 87%. The interview responses were compared one by one according to interviewee. The same comparison was made with the survey responses as illustrated in Table 5. The number of comments, number of codes, number of matches to illustrate agreement between researcher and peer coder was then calculated as a percentage of accuracy. The make-up of the randomly selected participants resulted in a sample that included the only two males from the interviewees, one of the longest interviews and one of the shortest interview times. No changes were made based on these differences thus allowing the peer coder to proceed and complete the coding of the data.

**Table 5**

*Interrater Reliability Results of Interview Responses*

Participant Sample	Comments	Codes	Matches	Accuracy
1	33	51	42	82%
2	17	28	26	93%
3	29	52	24	83%
4	15	20	20	100%
5	24	35	31	86%

Overall, the combined average percentage of codes used by the researcher and peer coder is 89%. Using an a priori code list with definitions contributed to this outcome. The discrepancies reflected a difference in interpretation of the codes' definition. For example, lesson plans (LP) were for the extent or quality of written and/or electronic plan provided and left by the classroom teacher to be used by the substitute

teacher and not what the substitute teacher planned to use with the class. Another example is for student behaviors (SB). This was for situations with individual students which is different than classroom management (CM) with the entire class as a whole and not the reporting of such occurrences back to the classroom teacher. This comparison does not include the additional coding by the researcher above and beyond the coding done by the peer coder due to the multiple reviews and first-hand opportunities to meet, hear and listen to the interviewees.

### **Substitute Teacher Experiences**

This study explored perspectives of substitute teachers and captured descriptions of their initial experiences that acknowledged their “why” to become a substitute teacher and validated they had a “story” to share. Research question one had a central question and four sub-questions. The central question asked, what are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school? Within a school, substitute teachers expected to have experiences in the classroom and with other adults on campus. To expand on these significant personal accounts, there were four sub-questions for research question one.

1. How do new substitute teacher describe their classroom experiences?
2. How do new substitute teacher describe their experience with administrators?
3. How do new substitute teachers describe their experiences with faculty?
4. How do new substitute teachers describe their experiences with staff?

There are four findings that addressed research question one and its sub-questions.

Findings used to create categories are listed below and discussed further with the specific codes in subsequent sections:

1. Experiences in the classroom were dependent on the use of lesson plans, combined with actions to keep students engaged while managing the class and student behaviors.
2. Experiences with administrators occurred through personal conversations.
3. Experiences with faculty focused on communications with teachers present on campus or with the absent permanent teacher they were assigned to as a substitute teacher.
4. Experiences with staff were limited and often task oriented.

### **Lesson Plans, Student Engagement and Management Techniques**

Substitute teachers spent most of their workdays in classrooms with students. At the elementary level, they were with one class for an entire day. If the substitute teacher was assigned to a special area subject (i.e., art, music, physical education), they either moved from class to class as one participant described as a “rover”, or they were in a room and the classes switched throughout the day following a schedule. At the middle and high school levels, each period was with a different group of students in the same subject or different subjects depending on school needs to fill a teacher vacancy.

Regardless of their assignment, the substitute teachers described their positive and negative experiences without hesitation on the survey and during interviews. These experiences set a tone and created a space for substitute teachers’ thoughtful responses.

There were no hesitations in descriptions and some unconventional experiences.

Descriptions of themselves in classroom situations defined their role as a substitute teacher and coding of the data identified two major findings.

The first finding was the substitute teachers' ability to follow lesson plans was based on the extent or quality of the written or electronic plans left by the permanent teacher necessitating preparation and planning prior to the start of the school day. The second finding focused on the students and how the actions of the substitute teacher guided activities and behaviors necessary to maintain order in the classroom for all students. The codes used to discover this finding were:

- Classroom Experiences (CEX): Situations with full classroom of students
- Lesson Plans (LP): The extent or quality of written and/or electronic plan provided and left by the classroom teacher to be used by the substitute teacher
- Student Engagement (SE): Level of activity; types of activities
- Management (MGT): Controlling behaviors of students

There were detailed responses that explored the full-time teachers' lesson plans, strategies used to engage students, and management techniques used to handle student behaviors in the absence of the permanent teacher.

Teacher absences were either planned in advance or unexpected. If it was a planned absence, there was a higher probability that lesson plans were left for the substitute teacher. Some participants received very detailed lesson plans, especially noticeable at the elementary level. One participant felt the lesson plans were very organized and available electronically with allotted times of 10, 15 or 20 minutes for each subject. She observed that the students "don't process whatever they are doing" due to a fast paced schedule. Another shared a permanent teacher's intent for the students, "there's been a few times where the teachers will just leave the lesson plans and let them take this as a day for them to make up any work or independent work." The substitute

teacher then circulated and assisted students as needed to finish up what the students were working on in class. During an interview conversation about lesson plans, a participant recalled “some are detailed but typically I find there’s enough room to achieve what the teacher wants me to achieve and having a little flexibility.” During this flexible time, the substitute teacher selected supplemental activities to use with the students.

For those occasions when little to no lesson plans are left by the permanent teacher, survey participants resolved this issue by “asking the students and/or consulting with other faculty members.” Another felt “it’s a great way to test my knowledge and how efficiently I can adapt to creating a successful learning day.” Keeping with that positivity, “I usually have a backup lesson plan in mind or resources that I can use depending on the grade level.” There were a few substitute teachers who were “insecure”, or “found it hard.” One did not “have the chance yet” to select student activities and one noted “I’m getting better.” An interviewee admitted, “be open to the unexpected” with minimal or without lesson plans available while a different participant was “trying to make learning fun by stimulating and rewarding curiosity, critical thinking, problem solving, resourcefulness and ingenuity.”

The perception that every classroom is unique lent itself to this interviewee’s answer about planning and preparing.

As much as you try to prepare, I don’t know if I was fully prepared. I mean, for instance, I didn’t even understand the term specials, which means music, art, physical education and you know some form of technology. I mean, the thing is, there are some things that are so specific to a particular classroom or to a particular grade.

Lesson plans included specific instructions and guidance for a school day. Since each day potentially is a new assignment, participants understood the need to review the lesson plans before student arrival. Although as one interviewee said, “you just follow the plan and it’s pretty straightforward”, it was followed up with “I try to do a little bit of preparing as quickly before that half hour before they [the students] come in in the morning you know and do a little bit of reading and try to understand the topic.” This quick preparation was the only option prior to the start of the instructional day. Another interviewee admitted that technology was an area of weakness. Instead of avoiding it, students were asked to help and teach the substitute teacher that resulted in a positive learning opportunity. This vicarious experience (Bandura, 1977) of observing students modeling tasks on computers for the substitute teacher was an outlier and reversed one comment in that “you’re just filling in for the day.” With increased vicarious experiences (Bandura, 1977) combined with job-embedded learning (Dewey, 1897, 1938), substitute teachers changed how they viewed their performance in the classroom.

Substitute teachers spent most of time during the day praising students who behaved appropriately followed by correcting students who behaved inappropriately. Survey results indicated that nearly 41% used praise to maintain positive student behaviors. Interview conversations elaborated on this positivity to manage student behaviors by offering incentives such as daily treats or a sticker for primary level elementary students. Substitute teachers also chose nontangible incentives and played an indoor game with the class, showed a video or gave extra free time if all classwork was completed for the day. Despite efforts to handle disruptions appropriately, 26% of the participants spent most of a school day correcting students who demonstrated

inappropriate behavior. At the secondary level, substitute teachers had to compete against a student's personal device, or cell phone, despite ECSD's policy noted in the Code of Student Conduct for the wireless device to be turned off or placed on silent and securely out of sight during class. Use of a cell phone during class is at the sole discretion of the teacher for instructional purposes only. If behaviors escalated and jeopardized the safety of the adults and students in the classroom, a couple participants sought assistance from campus security or administrators to remove the student. This option was utilized after all other techniques were unsuccessful. One participant felt,

it really depends on how the class is behaving, but I find that depending on the class and the kids that are in the class, I need to adapt to who I have in front of me, so there's not really a one size fits all for some classes. I can walk in and they're fine throughout the day and I don't have to do anything extra. There are some where I have to give extra incentives. There are some where I have to kind of hold their hands, kind of coax them, give them like a break after every single [lesson] and sometimes I've just thrown the lesson plan out completely and just put on something because it's just been a class full of challenging students that I just was not able to get through anything.

This substitute teacher exhausted all options and knew in the end that managing the student behaviors was paramount. Survey results reflected that just over 10% of participants report students involved in disruptive conduct to school administration and nearly 30% leave a written note or email for the permanent teacher citing the names of disruptive students. To strengthen opportunities for students to feel safe, attention was given to them by the substitute teachers. One interviewee used the term "avuncular" as a



self-description that indicated the type of relationship or connection with the students, which reduced being taken advantage of and increased the level of trust experienced in the classroom.

### **Individual Conversations with School Administrators**

The second finding is that experiences with administrators occurred by engaging in friendly and personal one-on-one conversations. These conversations were with the school's principal and/or assistant principal. For the survey and interviews, 100% of the participants met school administrators. From the survey, participants had an additional opportunity to enter what they talked about during the conversations. One interview question directly asked how a substitute teacher felt when they met and talked with school administrators. The responses were coded as interactions with administrators (IA) and reflected Dewey's (1897, 1938) theory of social constructivism as social interactions (SI) or behaviors between adults. These conversations between adults strengthened opportunities for an administrator to recognize the participant as a substitute teacher working at the school. One survey participant shared, "I subbed at a school I used to attend. I know the administration well." Another was a parent and worked at her children's school where she had met the administrators previously. When describing conversations with administrators, typical discussions were about school-day procedures, or "brief interactions of instructions or directions", potential future full-time employment or appreciation as a substitute teacher. Positive comments made about administrators included "super nice, super helpful, "very welcoming", "very supportive, very positive." One survey noted they talked about "just pleasantries; she thanked me for being there." No negative comments were offered. However, one participant admitted if she's "at a

school that I'm really temporary at, I'm just there for the day, I don't really have much interaction other than good morning, hi or bye."

Study participants returned to the same school or schools for assignments as new substitute teachers in ECSD which lent itself to more opportunities to interact with administrators. One participant expressed,

I'm friendly. I love to introduce myself when I'm subbing at a school to first get to know who the principal is, you know in case they have positions, they will tend to call you especially if you do an introduction and tell them a little bit about yourself.

As familiarity increased, substitute teachers approached administrators for answers to questions or assistance with problems. One participant further explained, "I also say to them on a day when it's rather unstructured, you know, I have a block of time, half hour here, can you put me somewhere you need me? I have the bandwidth, so it's very cooperative and collaborative."

Participants recognized substitute teaching was temporary employment and elected to discuss availability of future full-time employment. Some are recent graduates with plans to be full-time teachers and one wants to be a teacher assistant. Others wanted recognition during conversations about their "background and prior teaching experience" or to just share how their day was going at the school. Within social constructivism, this recognition by others contributed to their experiences (Dewey, 1897, 1938) and connected to one's self-efficacy through repeated effective performances (Bandura, 1998). Participants perceived that these interactions increased opportunities for job assignments or to "help me understand, do I want to come back here or not? The

advantage of working in a temporary position allowed the substitute teacher to decide whether to return to a particular school or not based on experiences. Gratitude expressed by administrators was recognized by the substitute teachers and over time, they got to know the school principals and assistant principals. One said, “I usually have everything that I possibly could have to help the day go smoothly.”

### **Communicating with Faculty On and Off Campus**

The third finding characterizes experiences with faculty focused on communications with teachers present on campus or with the absent permanent teacher they were assigned to as a substitute teacher. Two codes that lead to this finding were Interactions with Faculty (IF) and Classroom Teacher Communication (CTC). The ways substitute teachers described their experiences with faculty occurred during non-student instructional time through conversations that increased familiarity. Interactions were reciprocal. There were times when the substitute teacher approached a permanent teacher or vice versa. Either way, the recognition from the permanent teacher again confirmed a principle source of information for self-efficacy (Bandura, 1998). This was evident in survey and interview responses by participants. An open-ended survey question asked, how do you get to know full-time teachers at a school? There were multiple references to specific times during the day when communications took place with minimal remarks to any forward approach by the substitute teacher to initiate contact. Since interviewees completed the survey first, an interview question intended to expound on this initial interaction by asking, when working with full-time teachers as a substitute teacher, describe how they talk to you? These descriptions were dependent on frequent visibility and informal or causal observations of the substitute teacher’s performance. If a full-time

teacher recognized competence in a substitute teacher, that spoke volumes to their confidence in the substitute teacher and then increased opportunities for job assignments at that school. The use of the word *coterie* when used to describe interactions with teachers by an interviewee was unique, “in terms of working with the other teachers, they are always helpful. You have to break into that *coterie* of teachers.” The actions of this substitute were intentional to gain recognition.

Generalized terms used by participants to describe interactions with faculty included “they’re great, very nice”, friendly and helpful. Similar to administrators, self-introductions, casual conversations, or asking questions contributed to increased acquaintanceship amongst the teachers. Several mentioned that after they substituted for a teacher, returning to the same school aided in building relationships. Times during the day to get to know the full-time teachers were during lunch, breaks, or in the teacher’s lounge. Survey responses listed “difficult” and “there’s not much time to get to anyone” alluding to a lack of opportunity for social interactions. The teacher next door or across the hall was viewed as supportive when approached for assistance. During an interview, a participant shared, “they really do their best to just make sure that my day is able to run smoothly and that the kids for that class are able to at least stay on track and not fall behind.” Phone calls, text messages or emails between the substitute teacher and permanent teacher contributed to camaraderie.

An interviewee felt “a little bit more freedom in lessons, or they show a little bit more trust when they’re not just giving you busy things to do, but they’re trusting that you’re able to move the education forward, even though the teacher is not there.” These experiences supported the expectation that substitute teachers maintained the continuity

of teaching and learning. This does not eliminate those times when participants encountered faculty members who were not supportive. Having conversations that lacked support made this substitute teacher wonder “whether they’re having a bad day or they’re in a bad mood, or you know they’re not as warm or friendly.” A substitute teacher who described herself as young in age felt talked down to by the teachers older in age, however, she accepted everyone’s friendliness. Her experience was that

some teachers are a little more assertive than other teachers and then some are just kind and ready to help you and some are like no, make sure you do it this way and watch out for this kid and so I’m already intimidated a little bit, but other than that everyone is always nice.

Experiences ranged from brief and informative conversations to those that frontloaded information with operational details for the day. Even if met with matter-of-fact tones, participants sought out groups of teachers to interact with for advice, feedback or to learning something new that benefited them as a substitute teacher.

### **Exchanges with Staff**

The fourth finding described interactions between a new substitute teacher and staff. Codes to identify these changes were interactions with staff (IS) and social interactions (SI). A school’s staff was comprised of several different positions as reported by the substitute teachers. Included were office staff, school resource officers (police), security, guidance counselors, Exceptional Student Education (ESE) aides, paras (paraprofessionals), and cafeteria workers. Another open-ended question on the survey asked participants about their experiences meeting and working with staff. These different positions limited any in-depth exchanges and relied on specific tasks or jobs that

needed to be completed at a certain time throughout a school day. Participants used words such as “collegial”, “super-sweet”, “courteous and professional”, and a “pleasant experience” when working with staff. A survey mentioned “my experiences working with the staff has been very well as there is a lot of working together and collaboration with us substitutes.” There were those instances when a participant experienced both positive and negative experiences with staff. The contrast was viewed as “nice or rude”, “very friendly or very serious”, “warm to icy”, “great to awkward/not well.” Substitute teachers learned not to presume staff knew who they were at first and since they went from school to school, the substitute teachers did not know a staff member’s specific job. As one remarked, “everyone is different.”

Unlike during interactions with administrators and faculty, there were two participants who were reluctant to approach staff and kept to themselves. However, both admitted they did greet staff with short casual conversations, ask questions or share concerns when necessary. One participant admitted she was “prone to get lost especially in a large school” and relied on support or guidance from staff members. For those times when assignments received by substitute teachers were outside of a classroom, staff was very helpful. Examples included car duty, cafeteria duty, or proctoring exams. However, one found that “support staff expect far too much effort and additional work.”

Despite direct reference to a Sub Coordinator during the Substitute Teacher Training, no participant connected that title to any member of a school’s staff. Each school in ECSD has a Sub Coordinator to assist with information about a substitute teaching assignment and the school. Perceived experiences were that staff, as a whole, served as a resource, ready to help and listen.

## Conclusion

Experiences by substitute teachers in the classroom, with administrators, faculty, and staff revealed unique findings connected theoretically through self-efficacy (Bandura, 1977) and social constructivism (Dewey, 1897, 1938). Individually, three out of the four principle sources of information (Bandura, 1977) contributed to a participant's sense of confidence. The more frequent a participant works as a substitute teacher, increases opportunities to observe practical experiences and replicable tasks to choose and make their own. Positive comments or feedback offered by administrators, faculty or staff spikes credibility in the eyes of the substitute teacher. These moments contributed to an increased level of confidence. However, there are those recognitions or lack of recognitions by others that affect experiences with social interactions (Dewey, 1897, 1938). During an interview, a substitute teacher added a thoughtful comment at the conclusion of the questions about interactions with administrators, faculty and staff.

It's just a little weird because I don't think people realize that we're coming into every single day blind. And that's a lot for a person to like to wake up every day and not know what school they're going to, not know where to park, not know where the bathroom is, not know where the lunch room is, but still taking out that time to try and foster a good environment for those students while their teacher is gone. So I guess sometimes you don't really feel that appreciation of like thank you so much for helping out while our teachers aren't here. It's more like you are a sub; so I can say that no one went out of their way to be rude, but definitely sometimes the hospitality isn't there.

The "people" she refers to are the administrators, faculty and staff of a school. This physiological experience may have influenced or decreased her self-efficacy as a substitute teacher (Bandura, 1977). This study's participants demonstrated a willingness and interest to interact with school administrators, faculty and staff. Evidence for these experiences was supported by the frequent use of the codes connected to research questions two focused on interactions along with the study's theoretical framework codes addressing self-efficacy and social constructivism. They approached others and reciprocated by being approachable, despite any resistance of others to do otherwise. The participants' descriptions revealed an openness to receive assistance, resources, and materials to strengthen their credibility as a substitute teacher.

The self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school classroom addressed research question one in their genuine descriptions of classroom experiences and their social interactions with school administrators, faculty and staff. Study participants expressed a recognizable interest and desire to work as a substitute teacher and predominately accepted job assignments in more than one school. As the school day began, their feelings of happiness, excitement and exhilaration were felt walking in a classroom before the school day began. Simultaneously there were feelings of nervousness, uncertainty, or apprehension. One new substitute teacher had many unique experiences and summed it up thoughtfully.

Everything that you don't expect in the classroom will probably somehow happen, and to have the mindset of like you are a teacher. I think that's really the weird part, because you know, everyone's like I'm a sub, but today you are a teacher and I think that was the hardest part for me to realize. Like I'm the



teacher in this room. That is how they view me. But if I don't view myself like that, it's gone, especially for the kids.

In the end, the substitute teachers perceived themselves as capable and had a shared belief that through their actions, they will experience success.

### **Confidence Factors for Instruction**

The second research question asked what do new substitute teacher believe influence their confidence for instruction? After analyzing the data, findings indicated that three factors impacted substitute teacher's confidence: participants' familiarity with role, instructional content, and the school community. Survey responses and interview conversations identified factors that were and were not within the realm of control for a substitute teacher. Coding for confidence in conjunction with codes about self-efficacy (Bandura, 1977) and social constructivism (Dewey, 1897, 1938) led to four findings that answered research question two. There were other codes that contributed to the findings focused on content knowledge, work experience as a substitute teacher, and student interactions. The specific codes used to reveal these finding included:

- Confidence (CON): self-reported awareness of confidence in role as substitute teacher
- Performance accomplishment (PER): practice to gain relevant experiences
- Vicarious experiences (VIC): observing others modeling a task
- Verbal persuasion (VER): positive encouragement by someone perceived as credible
- Physiological (PHY): states that influence or decrease confidence to perform tasks

- Social Interactions (SI): behaviors between adults and children
- Learning (LRG): learning by doing or job-embedded learning
- Recognition (REC): by others contributing to experiences
- Lesson Plans (LP): the extent or quality of written and/or electronic plans provided and left by the classroom teacher to be used by the substitute teacher
- Instructional Delivery (ID): lesson presented to students
- Substitute Teacher (ST): work experience as temporary teacher in the absence of the classroom or permanent teacher
- Classroom Experiences (CEX): situations with full classroom of students
- Student Engagement (SE): level of activity; types of activities

There are four findings listed below that addressed research question two. Each will be discussed further in the sections that follow.

1. The first finding focused on one's level of confidence in the position as a substitute teacher.
2. The second finding revealed that a participant's preparedness for the instructional content either increased their confidence or created avoidance to accept assignments for grade levels or subjects with less familiarity.
3. The third finding identified frequency of working in classrooms within a school community as a repeated factor that positively influenced confidence.
4. The fourth finding demonstrated that when substitute teachers built relationships with students, their confidence improved when working in a Kindergarten through twelfth grade classroom.

## **Familiarity with Role as a Substitute Teacher**

The first finding discovered that when substitute teachers believed in their ability as instructional leaders, the potential for a successful and productive day was established. A survey question asked, “do you feel confident around teaching”? Nearly 90% of the respondents selected “Yes” and the rest answered “No.” The second part of the question asked for an explanation of why they answered yes or no. Several short answers referred to a love for teaching and enjoyment of working with children. Interestingly, despite answering in the affirmative for confidence, their own words alluded to a different perspective. One participant wrote, “I feel confident in teaching but cautious about what awaits me while substituting.” Another is “excited to be around young curious minds but also daunted by the challenge of working for a system that doesn’t support or value me as a person and as a professional.” Both comments echo Bandura’s (1977) physiological states that influence or decrease confidence to perform tasks. These participants had the right intentions for working as a substitute teacher along with hesitancy and concern for the school community. Only three reasons were noted on the survey for not feeling confident. Two referred to “not having enough experience within the classroom” and for the other, “there’s nothing really left for subs, very little if any instruction left behind, it creates a bit of confusion for the teacher and the students can sense this.”

Interviews began with a question about confidence, “how would you describe your confidence to teach before and after being in the classroom?” with the prompt, “what has impacted that difference?” This created a space for participants’ thoughtful answers. Confidence was either maintained from start to finish or gained as the school day progressed. Participants mentioned their own memories as students in Kindergarten

through twelfth grade classes without permanent teachers did not equate to understanding the experiences of substitute teachers. Descriptions highlighted positivity despite a few challenging instructional experiences. They recognized their own limits with curriculum content and student behavior. Interviewees were asked to “describe your confidence in continuing the learning while the permanent teacher is absent.” Personal impressions of themselves did not portray the interviewees as replacements for the permanent teachers, however, they recognized an improved preparedness over time in classroom situations and in their role as substitute teachers. The final question addressing confidence was about the Substitute Teacher Training, “to what degree did the training you received increase your confidence level as a substitute teacher?” This question will be revisited in the discussion for research question three. These questions accentuated the substitute teachers’ descriptions of factors influencing their confidence for instruction. Participants expressed confidence in themselves before, during, and after the school day. This self-confidence spread to additional contributing factors that made an impactful difference.

### **Confidence Improved with Subject Matter Knowledge and Access to Lesson Plans**

The second finding revealed that substitute teachers are more confident when they were given the opportunity to be prepared and possess familiarity or understanding of the grade level or subject matter and have lesson plans ready to follow during instruction.

An interviewee felt

I have a good amount of confidence, some subjects I’m not, I wouldn’t say I’m an expert in or I am not familiar with like, say for example maybe science, or you know calculus or algebra. I mean certain things I would have to brush up on, but I’m always up for the task or the challenge.

Another referenced her associate degree and believed “I know the material that’s being taught when I’m substituting, so I feel pretty confident because I’m able to relate with the subject.” In contrast, an interviewee believed she would not teach any class if she could not provide input on the subject. Another participant recognized an opportunity for growth with the “need to increase my vocabulary” when teaching.

Knowledge of the content was also dependent on the availability and completeness of lesson plans. If the permanent teacher provided detailed lesson plans for the school day, participants were confident in their ability to follow them effectively. If not, they were able to acquire assistance from members of the school community (administrators or faculty) to supply them with daily plans. They also had to rely on their own knowledge and skill set to supplement that information and plan activities for the students. From one substitute teacher in receipt of lesson plans, “I do feel confident as far as delivering the information that the teacher has left for me, as long as there’s enough information to deliver, if there’s not enough, then no, I would not feel confident at all.” Having a lesson plan also fills a gap if a particular subject isn’t their “forte.” In addition to the lesson plan, one substitute teacher preferred to have notes left by the teacher ahead of time to advise of subject area to better assist the students. Finally, one participant provided a sequence she follows as a substitute teacher.

I look at the teacher’s lesson plans that she’s left me, and I go through it and make sure I can find everything that she’s pointed out. So, if they are reading a certain lesson, I make sure to put a post-it where that lesson’s at so it’s easy to access. I make sure if I need supplies for something that I made sure those are right next to me and readily available because I just think that helps me feel better because

that's not my classroom, that's not my class. So, if everything is next to me and I know where everything is at, then I can easily transition between subjects then I feel a lot better.

The substitute teachers feel confident with access to the permanent teachers' lesson plans, class materials, and resources (print and digital) and rely on that preparedness to support student learning of the content.

### **Confidence Raised with Frequent Experiences Working in a School Community**

As new substitute teachers, all study participants worked a minimum of ten full school days in a classroom. Many interviewees indicated that they accepted frequent job assignments in the final weeks of the school year. The third finding seemed to show that with more chances to work, confidence levels rose. "I had trepidation; I didn't know what to expect. After some experience, I probably substituted 100 times. I'm pretty confident that I can carry out the responsibilities of a substitute teacher." One interviewee with high school teaching experience working in an elementary school honestly admitted, "so I would say that initially I went in very confident and was kind of shocked out of that confidence but have regained the confidence over time." Some participants chose to work at the elementary level because it was the school their children attended, a few wanted to work at a school they attended as a student, others picked locations close to their homes. One participant felt confident working only at the local elementary school which is in walking distance where he can teach Spanish and is a self-proclaimed "history geek, so I love all that." During this time spent at an elementary school, he continued with this realization,

what sometimes is a little tricky is the new ways of looking at arithmetic which are a little bit different than when I was growing up so, but I mean, it's just fascinating, but to me, I can do it, I can embrace it.

A substitute teacher working at the high school level for the first time felt very nervous and did not know what to expect. After she realized the situation and how it would be moving forward, she felt more comfortable. Finally, two of the three interviewees who are in the 18-29 age bracket mentioned their young age contributed to feelings of apprehension working as a substitute teacher. Both thought their youthfulness was a factor influencing their level of confidence that improved over time.

### **Confidence Impacted Through Positive Student Interactions**

The level in which the substitute teacher interacted with the students throughout the day factored into their belief of feeling confident with instruction led to this fourth finding. These social interactions (Dewey, 1897, 1938) or behaviors between adults and children included managing the classroom and individual student behaviors. One substitute teacher tells the students “that even though I’m a substitute teacher, there are no freebies on my watch, we’re going to learn. Just being confident and authoritative, I think those work.” To further opportunities for interactions, a participant particularly enjoyed having conversations to build relationships with students. It was also clear that when a substitute teacher spent consecutive or nonconsecutive school days with students, this increased opportunities to build teacher-student relationships. This was not as effective if with a class or group of students for one day only. This rapport was also evident during an interview,

before I go in, I'm a little nervous, so my confidence is okay, but I feel like it gets better once the kids come in. I get to see them and interact with them and so I feel like it grows throughout the day. I get those initial jitters or butterflies before the kids get there.

High confidence was felt by a participant due to her love for children and desire to be around them, too. She wants to have fun with them, and she wants them to have fun with her since she believes if they have fun, the students learn and she does, too! These student interactions also allowed the substitute teacher to select class helpers that “just made it a little bit easier” and “as time went on, it was just like second nature” being a substitute teacher.

### **Summary**

The substitute teachers recognized that confidence was necessary to expect the unexpected. Each school day creates new experiences. This created opportunities to learn by doing, or job-embedded learning (Dewey, 1897, 1938). The words of this participant during an interview sums up the four findings for research question two about factors that influence confidence for instruction.

It's not always easy because typically I may not really know what's going to happen unless I have the lesson plan and I may not know that until the morning of. So, I try to understand really quickly or sometimes it may be, let's say I'll have assignments to fill in for a particular teacher for a day or two. What I try to do is go over the coursework, understand the text, and more importantly, try to get to know the students as well, as best I can because I find that the better I know the students and if I'm there over several days, it's even more effective.



This interviewee referenced the importance of preparing for lessons by reviewing the coursework and text. Furthermore, this participant touched on opportunities to build teacher/student relationships that get better over time by regularly working in the same school. The new substitute teachers recognized limitations in their role with teaching and learning; however, they are motivated educators and capitalized on opportunities using all four of Bandura's (1977) main sources of self-efficacy. At the end of a school day, the participants want to do a good job by reflecting on their classroom experiences, learning through observation of instructional situations by permanent teachers, hearing positive feedback from others within the school community, and recognizing their own emotions as it relates to their behavior and performance in the classroom as a substitute teacher. An initial opportunity to learn about becoming a new substitute teacher was possible by attending the required Substitute Teacher Training. If and how this experience increases one's confidence level is fully described in the next section about research question three.

### **Substitute Teacher Training**

A requirement for all candidates to become a substitute teacher in ECSD was attendance at the Substitute Teacher Training. Regardless of any teaching or substitute teaching experience, this training must have been completed. The intent was to provide relevant knowledge, skills, and materials to support success in a Kindergarten through twelfth grade classroom for anyone over the age of 18 and who earned a minimum of 60 semester hours from an accredited institution. There was a one-time cost of \$40.00, paid online using a credit card, and was not reimbursed by ECSD. In addition, a completed application with all required documents (employment documents, copy of signed social security card, official transcripts) were uploaded into the online application system prior

to selecting an available training date. The monthly virtual training was a live, synchronous session conducted via Microsoft Teams from 9:00 AM – 1:00 PM. Participant needs for online learning included a personal computer or laptop, internet access, audio, microphone, camera, and quiet space. Each training followed the same agenda (see Appendix K). Content included expectations of a substitute teacher, ethics, effective teaching behaviors, classroom management, teaching strategies, safety and security protocols, and introductions to Canvas, which is ECSD’s learning management system and Microsoft Teams.

The Substitute Teacher Training was the common experience among all the study participants which supported the importance of the third central research question: what do new substitute teachers perceive are the strengths and weaknesses of the required training? The demographic information self-reported by participants reflected diverse educational backgrounds and professional experiences. There are three findings for research question three listed below and explained further in subsequent sections.

1. New substitute teachers reported that the content, resources and design of activities were a strength of the training.
2. New substitute teachers elected to implement the new knowledge through their actions.
3. A weakness of the training was the lack of field experiences for new substitute teachers.

Within the third finding, substitute teachers identified other weaknesses or topics they wished would have been included in the training. Coding predominantly was represented by four codes. Each one began similarly with substitute teacher training (STT) and three

others suggested strengths (STTS), weaknesses (STTW) and recommendations (STTR). Whether a substitute teacher is engaging the students with instruction or interacting with them in place of the permanent teacher, the ultimate goal is for a productive day for them and the students. This goal as a theme was reflected throughout all collected data. The study's online survey, semi-structured one-on-one interviews, and artifact analysis captured a new substitute teacher's perspective about the training. Identification of strengths and weakness from the session they attended provided an additional opportunity to recommend improvements.

### **Training Content, Resources and Design of Activities**

Before a learner is exposed to new content, that subject matter has been selected and crafted by trainers with expertise in the material into a professional development opportunity for adult learners. A working knowledge of the adult learning principles (Knowles, 1980) by the trainers positions them to design a session to maximize new knowledge acquisition. Such an opportunity was discovered through the artifact analysis with each of the four selected items for this study as a direct link to the Substitute Teacher Training. The Substitute Teacher Handbook (Smith et al., 2016), STEDI.org website, PowerPoint presentation, and trainer notes are essential in the planning and delivery of the training.

The Substitute Teacher Handbook (Smith et al., 2016), published by STEDI.org was originally founded as the Substitute Teaching Institute at Utah State University in 1995. There are six chapters that cover the following topics:

1. Classroom Management
2. Teaching Strategies

3. The Professional Substitute Teacher
4. Special Education
5. Other Things You Should Know
6. Fill-in Activities

This handbook was intended for individuals who chose to work in a classroom on a temporary basis.

As a trainer's primary resource, the Substitute Teacher Handbook (Smith et al., 2016), allowed for application of two adult learning principles (Knowles, 1980). Codes used to capture this alignment of theory to practice were ALP1 that concentrated on an adult's need to learn through experiences that resembled their particular job as a substitute teacher. The second, ALP2, sought to identify the immediate connection felt by substitute teachers when learning what was relevant to their work in schools. Trainers created professional development exercises that featured real-world experiences and connected the new learning to job expectations. Selected content specifically from the handbook focused on principles of human behavior, professionalism, and preparedness of the substitute teacher, instructional strategies, and activities.

Allocating funds explicitly for purchasing this handbook and mailing it to each training participant demonstrated a commitment to the development of new substitute teachers by ECSD. With the handbook in the possession of the participants, a further benefit was free access to an online repository of accompanying suggestions, resources and downloadable activities at STEDI.org. If a participant did not access additional free resources on STEDI.org, they were still in a position to be a fully prepared and professional substitute teacher. Three participants in particular recognized the handbook

as “helpful”, “had some activities and things in it that was good”, and “providing supplemental things.” During an interview, one shared, “The book, I took that with me every day because I was like, OK, if we run out of time, I need to know kind of what can I rely on? So that was really helpful.” Upon review of the lesson plans prior to the start of the instructional day, substitute teachers determined what materials or technology equipment were needed throughout the day and what additional activities were needed to maintain student engagement. Another option was that the substitute teacher prepared the materials ahead of time as fill-ins during a class period or student day.

PowerPoint was the selected program that created a presentation or slide deck for the training. The design of the slides was standardized and included information by four different departments representing the hiring, professional development, instructional technology, and safety and security departments. Each department designed 60 minutes of professional learning for a combined total of four (4) hours. This allowed each of the four different trainers an equal opportunity to have their content included in the master PowerPoint presentation. Selected content from the Substitute Teacher Handbook (Smith et al., 2016) included rules of engagement, principles of human behavior and the professional substitute, e-learning digital tools, safety and security, and SmartFind Express (automated callout and online absence management to fill teacher vacancies with substitute teachers).

To ensure the content was presented with fidelity, detailed facilitator training notes were written for each slide in the master PowerPoint presentation. This resulted in a single, seamless and cohesive compilation of significant information specifically designed for substitute teachers. It also provided the opportunity for increased familiarity

and/or review of the content and flow of the presentation. An annotated presentation promoted collaboration amongst the different participating departments and was an opportunity to build capacity for an effective trainer's cadre. The presentation was saved in OneDrive and shared with trainers to allow for review, revisions, and updates to maintain currency of the content prior to a training session. The sharing of this intellectual property demonstrated a united effort amongst trainers.

To supplement the artifact analysis, participant responses from the survey and interviews identified commonalities validating the opportunity to participate in the training. Despite the necessity for attendance to comply with requirements, the overwhelming description of the experiences shared by study participants were positive. Sentiments were that it was informative, helpful, straightforward and specific. Although the session was recorded in Microsoft Teams and accessible to all participants in the chat feature from the session, no participant mentioned the interest or desire to revisit the recording to review or deepen their understanding of the new knowledge.

### **Application of New Knowledge**

Each new substitute teacher had the potential to acquire the new knowledge. Survey and interview responses indicated positive intent for this position's role and responsibility. Comments and thoughts shared by participants acknowledged an individual responsibility as to the level of effort exercised in a classroom. The training provided the "what" to do preceding the "how" or practices necessary to increase confidence in the classroom. Although there were different processes in every school, survey participants noted that the training "was helpful as much as it could be; however, real life experience is the best teacher", and "we really learn in the field." This spoke to

Bandura's (1977) most powerful source of information for self-efficacy and coded as performance accomplishments (PER) or successful experiences mastered through practice as a substitute teacher. This specific data were double coded to include learning (LRG) aligned to social constructivism since participants applied what they learned by doing the job as a substitute teacher.

Principles of human behavior were evident in the training design. It was described as a call to action for substitute teachers. By recognizing their own behavior first, they were situated to effectively manage student behaviors in the classroom. Despite the inclusion of this content in the training, an ongoing expectation for improved performance and practices was with classroom management and behavior management. This topic was in the survey and interview to understand how new substitute teachers managed particular situations. The new substitute teachers readily provided details of times when they prevented and/or addressed inappropriate student behavior. These highlights also created a space for this topic to be perceived as a strength and weakness following the training. The survey confirmed that substitute teachers spent most of the day praising students who are behaving appropriately. The second most used action was for correcting students who were behaving inappropriately. To further explore the application of knowledge learned during the training, a method of controlling the behavior of students was to leave a written report or email for the regular teacher citing the names of disruptive students. Seeking administrative assistance to intervene or reaching out to parents was used minimally by the new substitute teachers.

Surveys and interviews clearly revealed several useful topics from the training, one in particular was about "bringing a light bag of extra supplies." This participant may

not recognize the light bag as the SubPack modeled during the training, however, the supplies were suggestions learned during the training. Other useful topics included “emergency training with police”, “how to handle student’s bad behavior”, “overview of teaching practices”, and “fill-in activities.” These remembrances summarized the majority of what was covered during the training as written in the trainer notes and PowerPoint presentation.

When asked to what degree did the training you received increase your confidence level as a substitute teacher, an interviewee shared,

I feel confident because the day I had the training, that evening one of the office managers at a school called me and I was booked the next day and then they kept me booked for months, so I was OK, I’m doing it I guess. So it did help me feel better knowing that I had just finished training and I kind of know a little bit of what’s going on.

This new substitute teacher started working without any opportunity to process the new knowledge, yet proceeded to accept work assignments based on her confidence following the training. A recommendation with potential to increase self-efficacy (Bandura, 1977), would have been “to give scenarios and ask what we would do; this would help gauge how much we do or do not know” as expressed by a participant. This would accentuate vicarious experiences through observing others modeling which is currently nonexistent or minimally completed during the training.

### **Recommendations for Future Trainings**

During the planning and preparing time before the school day began, adjustments were necessary to the student activities based on whether detailed lesson plans or no



lesson plans were left by the permanent teacher. Two survey questions connected a substitute teacher's ability to select and use student activities. When asked if they learned how to do this during the Substitute Teacher Training, 48% answered yes and 52% answered no. This nearly divides the participants in half and supported their opportunity to engage in training. The dichotomy in responses aligns to results from previous question on confidence around teaching with nearly 90% answering yes. It was also encouraging to understand that new substitute teachers recognized their own ability to make instructional decisions. Confidence was strengthened through a link of learning with others and learning by doing (Dewey, 1897, 1938).

References of attending the training and working as substitute teachers during the COVID-19 pandemic by the participants offered different perspectives. For instance, the activities in the Substitute Teacher Handbook (Smith et al., 2016) and those presented during the training were not applicable or possible in the classroom due to an abundance of caution to maintain the health and safety of students and teachers amid the COVID-19 pandemic. The increased use of personal devices or laptops and digital tools necessitated a stronger familiarity with technology that was not possible during an online training. Despite the training's foundational overview of Canvas and Microsoft Teams, one participant wished he had access to teachers' logins so he would not "lose a beat." There was a sense of understanding that online learning limits opportunity for hands-on experiences, despite the reality that the new substitute teachers were hands-on with students in the classroom.

Survey and interview participants responded with thoughts about the Substitute Teacher Training as well as highlighting strengths, weaknesses, and offering

recommendations for future topics. Interestingly, the only mention of the least useful topic was “everything non-policy” related. This new substitute teacher may have been entering ECSD with prior teaching experience and a preference to learn about the procedure and management of the job as a substitute teacher. The survey question that asked “what did you think about the Substitute Teacher Training” received two negative comments. One was “it was lacking” and the other stated, “it’s standard, long and tedious and teaches nothing new aside from the policies specific to the district.” These weaknesses can be minimized with a revised training design inclusive of participant feedback. Such feedback was offered as recommendations for future trainings that focused on a desire to learn more about what was presented during the training. Topics repeated in survey and interview responses focused on technology, discipline, and instruction. Specifically with technology were Canvas, Microsoft Teams, and Pinnacle (attendance/gradebook). Under discipline, behavioral issues, classroom management tips, and rules on how to get students to behave were requested. One sought “how to connect more effectively with special needs students.” Finally, there was interest in lesson ideas, understanding of curriculum, and more on student engagement. These suggestions were expressed with credibility since the substitute teachers completed at least ten full school days with indications of working well beyond the study’s minimum for participation. These findings aligned to the third central research question in that new substitute teachers openly recognized and accepted the need for basic training. Each participant’s personal experiences influenced their mindset before, during and after the training. This contributed to thoughtful remarks on the strengths and weaknesses. As a

result, adequate preparation lead to authentic classroom experiences following attendance at the Substitute Teacher Training.

## **CHAPTER 5: DISCUSSION, RECOMMENDATIONS AND IMPLICATIONS**

Understanding the perspectives of substitute teachers will inform actions and policy to respectfully advance the role of a substitute teacher in the classroom and community. School communities expect the substitute teacher to be prepared, enter new environments effectively, and assist on short notice. The position of a substitute teacher requires opportunities for preparation, training, and growth. As teachers, they deserve respect as valuable school community members.

This case study explored perspectives of new substitute teachers about their initial classroom experiences following the Substitute Teacher Training in ECSD that contributed to their preparedness, confidence, and professionalism as substitute teachers. Additionally, improvements to the design of the training were suggested. Three central research questions and four sub-questions were answered in this case study.

1. What are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school?
  - a. How do new substitute teachers describe their classroom experiences?
  - b. How do new substitute teachers describe their experiences with administrators?
  - c. How do new substitute teachers describe their experiences with faculty?
  - d. How do new substitute teachers describe their experiences with staff?
2. What factors do new substitute teachers believe influenced their confidence for instruction?

3. What do new substitute teachers perceive were the strengths and weaknesses of the required training?

Qualitative inquiry was the selected methodology for this study because it afforded the researcher an opportunity to capture personal feelings, behaviors, and perceptions (Creswell & Poth, 2018). It established an opportunity to expand answers or conversations about first-hand accounts of experiences. The specific approach was a case study. Pseudonyms were used in all references to the research site, East Coast School District (ECSD), and title of the training (Substitute Teacher Training). Participants included 32 new substitute teachers recently trained in ECSD. An online survey, semi-structured interviews and artifact analysis captured data.

### **Summary of Findings**

The new substitute teachers that participated in this case study enjoyed spending time with children in school classrooms. Some of the substitute teachers in the sample described their personal teaching experiences as challenging. This reality impacts their own actions and behaviors. This understanding benefits the field of education since internationally, students spend one full year, or more, from Kindergarten through twelfth grade with a substitute responsible for teaching and learning (Lunay & Lock, 2006; Nichols & Wells, 2017; Vorell, 2012). Public school systems have the capacity to embrace substitute teachers as active and contributing members of a school community. This is critical since schools are unable to operate without the contributions of substitute teachers (Duggleby & Badali, 2007). Without substitute teachers, shortages occur. Efforts are needed to recruit, develop and retain substitute teachers by connecting professional responsibilities to real-world experiences. By exploring the perspectives of

new substitute teachers, a call to action to shift the intentionality for the role and responsibilities of the position was identified.

For each research question, key findings were connected to the ideas in this chapter. This is a summary of the findings that lead to this study's discussions, implications and recommendations.

1. What are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school?
  - Experiences in the classroom were dependent on the use of lesson plans, combined with actions to keep students engaged while managing the class and student behaviors.
  - Experiences with administrators occurred through personal conversations.
  - Experiences with faculty focused on communications with faculty members present on campus or with the absent permanent teacher they were assigned to as a substitute teacher.
  - Experiences with staff were limited and often task oriented.
2. What factors do new substitute teachers believe influence their confidence for instruction?
  - Self-confidence is a trait of new substitute teachers.
  - Knowledge of the instructional content either increased confidence or created avoidance to accept substitute teaching assignments for grade levels or subjects with less familiarity.
  - Frequency of working in classrooms within a school community was a repeated factor that positively influenced confidence.

- Confidence was improved when substitute teachers built relationships with students working in a Kindergarten through twelfth grade classroom.
3. What do new substitute teachers perceive were the strengths and weaknesses of the required training?
- New substitute teachers reported that the content, resources, and design of activities were a strength of the training.
  - New substitute teachers elected to implement the new information through their actions.
  - A weakness of the training was the lack of field experiences for new substitute teachers.

If impressions of substitute teachers switch from a fill-in or permanent teacher's backup to a guest teacher, this creates a positive tone. Respecting experiences of substitute teachers that reflect on their competence and confidence combined with expectations of school leaders and classroom teachers will, as Duggleby and Badali (2007) believe, maintain cohesion of the learning. As new substitute teachers experience success with increased knowledge of applicable grade and/or subject content and build relationships with school administrators, faculty, staff, and students, this ultimately contributes to strengthening a school community personally, professionally, and academically. Hite and Donohoo's (2021) discussion of "the culture-climate relationship" (p. 104) is applicable to substitute teachers in this way. As substitute teachers are immersed in a school community's culture, the actions of its community members affect one's perception of the climate. These perceptions, when understood, inform actions that influence the culture. The relationship is cyclical with new

opportunities to grow, adjust and improve the relationship between a school's culture and climate.

This case study's findings acknowledged what ECSD is doing to attract, develop, and hire eligible individuals to work as substitute teachers. In a large urban public school system with thousands of Kindergarten through grade twelve classrooms, it is challenging to standardize rules of engagement for role and responsibilities. Therefore, engaging with new substitute teachers prior to entering a classroom instills in them the necessary requisite knowledge and skills. Each of the study's three research questions allowed participants to describe their journey from the initial required training to at least their first 10 full school-day work assignments.

Research question one found that new substitute teachers had numerous personal experiences which motivated engagement inside and outside of the classroom within a school community. These experiences manifested into factors that influenced confidence to answer research question two. All of this was possible following participation in the required Substitute Teacher Training. Research question three sought to identify the strengths and weaknesses of the training from the perspective of the participants. Within all findings, there are undisputed missed opportunities. The decisions and actions of district and school leaders, faculties and staff could have changed the trajectory of experiences to increase respect and retention of these necessary educators. Ways in which each contributed to missed opportunities will be discussed to increase awareness, identify actions, and recommendations toward change.



## **Substitute Teacher Crisis Due to COVID-19 Pandemic**

For this case study, the school community was ECSD, a large urban public school system with 241 schools welcoming 251,215 students engaged in learning with 14,326 teachers and 2,138 substitute teachers for the 2021-2022 school year. Prior to the COVID-19 pandemic, the average number of daily teacher vacancies ranged from 1,000 – 1,600 with Mondays and Fridays as high absence days. Amid the COVID-19 pandemic, ECSD pivoted to virtual instruction from March 2020 to August 2020. The 2020-2021 school year opened with in-person instruction and supported a flexible model permitting students on campus in classrooms or students at home for live synchronous class time. ECSD suspended hiring daily substitute teachers from March 2020 to October 2020. During that time, either pool substitute teachers or interim substitute teachers sufficiently covered the need during teacher absences. In October 2020, ECSD reopened the application window and conducted its first virtual training in December 2020.

Participants in this study were cleared to work in ECSD in January 2021 and subsequently attended the required Substitute Teacher Training session available monthly. Due to ECSD's liberal approval of teacher requests for accommodations to continue remote teaching and learning during the pandemic, there was an increased need for substitute teachers on campus. Despite mask mandates and increased availability of vaccines for those eligible, many vacancies remained unfilled resulting in alternate arrangements being made for student supervision on campus. Only in-person work assignments were available; substitute teachers were not permitted to work virtually. This increased opportunities to gain practical knowledge and skills, as well as visibility as a valued school community member. Subsequently, experiences working in ECSD

during the months of January – June 2021 were described by the new substitute teachers to answer each of the three research questions. During this time, actions and attitudes of school administrators, faculty, and staff were the foundation for personal experiences that influenced new substitute teachers' perceptions of the position in and out of a classroom.

In the summer of 2021, ECSD made the decision to bring all students and teachers back on campus to open the 2021-2022 school year. An attempt to resume normal school operations was not an easy nor smooth task. An elevated number of teachers were either approved for a leave or retired from the school system. This resulted in more full-time teacher vacancies than candidates for permanent teaching positions. Therefore, reliance was placed on the willingness and availability of substitute teachers to temporarily fill the teacher vacancies until a full-time teacher was hired, assuming there were interested teacher candidates seeking permanent positions. Instead of 20-30% of classrooms being left without a substitute teacher, the average increased to a staggering 38-48%. On any given school day, close to half of all classrooms were without an assigned teacher (permanent or substitute). Efforts were exasperated in January 2022, when nearly 80% of the teacher absences remained unfilled due to no availability for a substitute teacher. Not only were teachers getting sick with COVID-19, the substitute teachers were too. An alternative plan for substitute teachers was nearly impossible until the positivity rate declined.

ECSD had a responsibility to increase their reopening plans to consider how it would effectively ensure all students were in class with a capable adult to supervise the instructional activities for the day. Without the option of in-person training, it is unfortunate that the virtual Substitute Teacher Trainings had to wait 10 months to begin.

This delay created a void that could have been minimized with an increased frequency of trainings to create a surplus of substitute teachers. A possible solution should have been to charge ECSD's departments responsible for substitute teacher recruitment, hiring and training to increase the candidate pool, even if it meant suspending, removing or reassigning work responsibility in the interim. From there, the professional development providers could prioritize content from the training to afford the opportunity for new substitute teachers to receive critical and necessary knowledge for their first days in school.

ECSD is not the only public school system in crisis with a shortage of substitute teachers needing immediate attention. Disruptions to teaching and learning are inevitable when teacher absences are not filled with a substitute teacher. Despite a school's best effort, permanent teachers often are the first ones called upon to fill in the gaps. Whether they are taking on additional students in their classrooms or giving up their planning time to serve as a substitute teacher for a colleague, these efforts are taking a toll on teachers. School systems cannot afford to lose teachers who are burnt out and may choose to retire early or make a career change thus creating a serious problem (Kamenetz, 2022). Substitute teachers are currently a topic of national attention with superintendents teaching lessons, parents invited into schools to cover classes, National Guard reserves called to step in, or uniformed and armed police officers being assigned to classrooms (Thompson, 2022). The reality remains, schools cannot operate without substitute teachers (Duggleby & Badali, 2007).

## **Shifting from Substitute Teacher to Guest Teacher**

The future of our educator pipeline would be better served by shifting school community members' perspectives of substitute teachers and thinking about them as guest teachers. The image of a guest teacher changes a negative view of the substitute teacher role into an "integral piece in the noble profession of education" (Vorell, 2012, p. 489). The role of a guest teacher is important in its own way. A guest teacher could be an educator with teaching experience who has made the conscious decision not to pursue a permanent teaching position. This prior time spent in the classroom elevates the guest teacher to pick up where the permanent teacher left off with instruction compared to a substitute teacher as a fill-in using alternate plans and activities to adequately manage the students for a day (Vorell, 2012). A guest teacher, with or without educational experience, may be noticed for their withitness, or the instinct for perceiving behavioral student needs in the classroom. A guest teacher that exhibits composure to de-escalate a situation speaks volumes to one's level of professionalism. To gain familiarity with a school community, these guest teachers could be recruited to work in a limited number of schools within vicinity of each other. Another option is to assign guest teachers to a specific content or student population based on their educational background, prior work experience, or personal interest.

The characteristics of a guest teacher offer a different experience than a substitute teacher or even classroom visitors. Schools have welcomed guests or experts in their field to make presentations or teach mini-lessons to students. This single presence does not equate to the true potential of a guest teacher. School communities will gain an understanding that guest teachers approach the role with a mindset as a companion to

permanent teachers. To fully articulate the difference of a traditional substitute teacher to a guest teacher, the development of a job description would include contract year, equivalent to one full school year, salary, education and required qualifications (training), position goal, duties and procedures (annual evaluation) and performance responsibilities (in and out of the classroom). This places the guest teacher among all other instructional employees.

In addition, school systems can accommodate this position of guest teachers by offering incentives. Since lack of a benefits package and paid time off are contributors to feeling unmotivated to continue working as a substitute teacher (Gonzales, 2002), school systems can hire guest teachers as full-time hourly employees with a medical, dental and vision plan. No longer temporary employees, opportunities to attend trainings are essential to ensure the guest teachers are properly prepared and maintain currency with curriculum, resources and technologies. To support their performance in the classroom, instructional strategies, class activities and selection of materials are areas of development for guest teachers (Deay & Bontempo, 1986). Professional learning and growth are an investment to strengthen the pipeline into the teaching profession. In addition, being selected to work as a guest teacher brings honor to the role as a valuable and contributing member of the school community.

The shift to guest teacher is not intended to replace the role of a substitute teacher. Daily substitute teachers will always have a place in schools. It is conceivable to meet the current challenges of teacher and substitute teacher shortages by building a strong teaching workforce. Shortages create loss of instructional time, gaps in student learning, and ultimately school closures as an unfortunate and devastating last resort (Shilling,

1990; Nidds & McGerald, 1994). Current realities have shed a laser focus on the impact this situation creates that cannot be ignored. The time for action was yesterday; however, today can initiate the charge towards upward movement for notable substitute teachers to shift into the role as guest teachers.

### **Recommendations and Implications**

As a result of this case study in one of the nation's largest public school systems, there are several recommendations and implications that ECSD and other districts can follow or adopt to advance the role of a substitute teacher. They will be discussed in three categories: District Policies and Practices, School Community, and Preparation and Ongoing Development of Substitute Teachers.

#### **District Policies and Practices**

The administration of substitute teachers needs to be elevated from a single coordinator and clerical staff who manage the day-to-day operations of substitute teachers to District leadership charged with decision-making. This is not meant to diminish the efforts of the small group responsible for hiring, training, placing, and handling performance concerns, it is intended to heighten awareness and create a place at the table to make a policy decision. This is possible when the Chief of Human Resources brings forward an important issue impacting every school in the district from the Director of Instructional Staffing on the lack of substitute teachers to meet current demands. To strengthen the message, the Chief of Human Resources, in collaboration with the Chief Academic Officer must comprehensively present the undisputable negative impact on teaching and learning without available human resources in the position of substitute

teachers. Since substitute teachers are not represented by a labor union, there are no outside influencers or negotiations necessary to bring this need to the table. It is an internal issue with decisions possible by ECSD's Superintendent's Cabinet of senior leaders. At this top leadership level, adequate funding can be allocated from general funds or entitlement and/or competitive federal or state funds with allowances for substitute teachers. Plans to recruit, develop, and retain substitute teachers is a non-negotiable. If ECSD does not want to maintain a majority of classrooms without a substitute teacher to cover a teacher absence, then needed actions are long overdue. The data do not lie.

A review of fiscal policy regarding the hourly rate of daily substitute teachers is in order. If completed annually, then it would illustrate the disparity from what ECSD pays its substitute teachers to other large public school systems. ECSD offered \$11.27 an hour for many years, which was less than its bordering school districts. Despite ECSD raising the hourly rate for daily substitute teachers to \$15.00 an hour during the summer of 2021, this was not done to demonstrate value for the position, it was out of necessity due to a severe teacher shortage and the need to hire additional substitute teachers. However, the hourly rate for teacher assistants was simultaneously raised to \$15.00 an hour as a permanent employee with benefits. Again, these employees are deserving of a raise, however, current substitute teachers are electing to secure positions as teacher assistants to earn the same compensation with benefits. When and where were the conversations and consequences of such an impactful decision made? It is unfathomable and disappointing that the top esculent of senior leaders would not have predicted the effect on substitute teachers. If they did, then a plan of action to rectify the problem is an

immediate need. Therefore, a policy that requires an annual review to revisit a substitute teacher's hourly rate is pivotal to maintain a pool of candidates to meet the daily rate of teacher absences is a recommendation.

### ***Introductions, Orientation and Recruitment by School Administrators***

During the training, substitute teachers are encouraged to learn who the principal is at an assigned school. If he or she does not meet an administrator, it is a missed opportunity by administration to be acquainted with those present on campus during any given school day. Findings from the first sub-question of research question one indicated that administrators are approachable and genuinely interested to engage in casual conversations with their school's substitute teachers. This moment is possible when a substitute teacher approaches the administrator with a self-introduction or when an administrator makes a point to introduce him/herself and welcome a substitute teacher on campus. The latter occurs less frequently. When administrators extend themselves to substitute teachers, it also sets an example for other school community members.

A productive use of time by administrators and substitute teachers would be to participate in an orientation session scheduled at an optimal time for full introductions, materials distribution, and opportunity for questions/answers (Johnson et al., 1988; Nidds & McGerald, 1994). Ideally, this would occur in the morning before the school day begins. This frontloading of information may eliminate issues and concerns throughout the school day and minimize the need for administrative assistance. Regardless of the number in attendance for such an orientation, the time would be well spent and potentially save more time in the end.



With substitute teachers likely to be on campus daily, administrators can take advantage of the situation by learning who may or may not be eligible and/or interested in full-time employment. This grow-your-own recruitment strategy capitalizes on familiarity with a school's culture and paves the way for a seamless transition from a temporary worker to permanent employee. Each day a substitute teacher works in a school is an interview for both parties eager to learn a little bit more about each other. If administrators believe the substitute teacher is a good match for the school community based on observed performance, and if the substitute teacher wants to work full-time, this is a highly viable pathway to a permanent teaching position. If not, it is a missed opportunity and compounds any teacher shortage without approaching a solution.

Following the conclusion of this case study, 50% or five of the ten interviewees are currently full-time employees of ECSD. As illustrated in Table 6, three are teachers and two are assistants. Only one of the ten participants did not earn a bachelor's degree, and thus was ineligible for a permanent teaching position; however, this substitute teacher was hired as a teacher assistant. All five employees worked between two – six months as a substitute teacher prior to being hired in a full-time position. The remaining five participants are active substitute teachers. As substitute teachers become full-time employees, the need for new substitute teachers is not diminished. The introductions for recognition, morning orientation meetings and grow-your-own recruitment strategies need to be an expectation by the principal's supervisor as part of responsibilities discussed during a site visit. Whether there is observable evidence to support all three or identified as opportunities for growth, these behaviors and actions ultimately can create best practices that allow for replication in any school.

**Table 6***Substitute Teachers Currently Working as Full-Time Employees in ECSD*

Gender	Age	Race	Major	Months Worked as a Substitute Teacher	Full-Time Position Title
Female	50-59	Black/Hispanic	Dance/Ballet	6 Months	Teacher Autism Cluster
Female	18-29	Other/Hispanic	Photography	5 Months	Classroom Assistant High School
Female	18-29	Black/Non-Hispanic	Animal Science (Pre-Veterinary Degree)	2 Months	Teacher Grade 3
Female	18-29	Black/Non-Hispanic	Interdisciplinary Studies	3 Months	Teacher Science - High School
Female	40-49	Black/Non-Hispanic	Associate's Degree	2 months	Teacher Assistant Pre-Kindergarten Exceptional Student Education

To respect substitute teachers' preferences for the grade level/s they are willing and able to work in, it is recommended that a public school system create a policy to institute a placement process. An electronic paperless system would match a substitute teacher to a teacher vacancy. The placement is based on criteria that the substitute teacher submits as preferences. This does eliminate the option for a substitute teacher to work directly with a school or schools of choice. If relationships are pre-existing, there is no reason to discontinue assignments to those schools. This matching option supports the finding that when substitute teachers are assigned to preferred grade levels or subject

areas, their confidence lifted. In addition, frequency and familiarity of the school community positively contributes to a substitute teacher's performance.

To maximize job performance and provide opportunities for administrators to drop-in to a classroom without the permanent teacher, a policy to conduct performance reviews is recommended to be developed for substitute teachers. A protocol, or observation tool, with a set of look fors or expectations would be scored by a qualified administrator. Any actionable feedback following an observation offered to a substitute teacher is an opportunity for growth to further develop one's skill set as an instructional leader. These opportunities directly support the finding that personal conversations between administrators and new substitute teachers are experiences occurring at schools. The particular words of encouragement are a form of verbal persuasion (Bandura, 1977) coming from a credible source that boosts a substitute teacher's self-efficacy. The above-mentioned drop-ins would also support a school's grow-your-own recruitment efforts in full-time positions with substitute teachers working on campus. From first impressions to subsequent times a substitute teacher works at a school can be viewed as an interview for future employment. This focus on performance improvement may reduce the current practice of reporting a substitute teacher's inappropriate behavior. Without any observable improvement or repeat offense, this escalates the substitute teacher to be placed on a "do not use" list which diminishes any professional growth or future employability.

Communication is key to maintain positive relationships between a public school system and its pool of substitute teachers. An on-demand resource is a designated page on a District's website specifically for substitute teachers. Information, materials,

announcements, and employment opportunities are some of the content to be posted.

This web-page is recommended only if designated District staff will ensure the currency and accuracy of the posted information. Otherwise, credibility will be diminished, and retention of temporary employees will be jeopardized.

### ***Interactions with Sub Coordinator about Job Assignments***

Every school in ECSD has a Sub Coordinator. It is this person's responsibility to secure a substitute teacher for each vacancy and maintain records of teacher absences. As such, this sub coordinator has the best chance to build relationships with substitute teachers. School administrators, along with their sub coordinator, can create a priority list with names to contact first to fill teacher vacancies before relying on job assignments from ECSD's automated system, SmartFind Express. This sub coordinator may be the first and last person a substitute teacher interacts with on a school day. It is a missed opportunity if this sub coordinator does not fulfill the potential of this role for the betterment of the school community. Although substitute teachers can accept job assignments online or with computerized phone calls via SmartFind Express, it is more personable when a sub coordinator personally makes contact by phone, text, or email about pending vacancies. Substitute teachers rely on this person as a go-to for everything about the school. Although the sub coordinator may not know all the answers, he/she hopefully knows who to confer with to get the correct responses.

The most appropriate person to join an administrator during an orientation with substitute teachers is the sub coordinator. Although the sub coordinator is often a non-instructional staff member who works in the front office, this role can be assigned to any school employee. The principal has the responsibility to select the sub coordinator and

ensure he/she has the right skill set to fulfill the role and responsibilities effectively. Monitoring the work of the sub coordinator by an administrator is also an expectation. Classes without adult supervision are not an option, therefore efforts to minimize disruptions are in the best interest of all school community members. In addition, to support the connection with a substitute teacher, the sub coordinator could serve as a mentor. This person should have proven work experience as a mentor, familiarity with the entire school community, knowledge of teaching and learning, excellent communication skills and the ability to motivate others. If given a non-classroom assignment for the day, the mentor could provide a one-on-one orientation to describe specific details. Examples include supervision in the cafeteria, hallways or during student arrival and dismissal. If assigned to a special education class, additional duties may be required that need on-the-spot training (i.e., food tubes or diapering). Working with a school counselor has specialized tasks worthy of detailed information (i.e., proctoring exams or privacy issues when handling student records). With this additional level of support, substitute teachers are poised to successfully serve as guest teachers and feel appreciated as school community members.

### **School Community**

It is suggested that support and professional acknowledgements contribute to substitute teachers valued as school community members. In Article Five of Dewey's *My Pedagogic Creed* (1897), his final beliefs about the School and Social Progress state

I believe, finally, that the teacher is engaged, not simply in the training of individuals, but in the formation of the proper social life.

I believe that every teacher should realize the dignity of his calling; that he is a social servant set apart for the maintenance of proper social order and the securing of the right social growth.

I believe that in this way the teacher always is the prophet of the true God and the usherer in of the true kingdom of God.

Dewey's placement of these beliefs as his final ones are powerful and provoking to reinforce a teacher's identification as a major social contributor. A teacher creates a connection extending our current reality to the beyond. If teachers play such an important role, then the amount of time students spend with substitute teachers attaches them to the same ushering role as a spiritual leader. Teachers, including substitute teachers, may not and/or are not able to fully prepare children for continuous ever-changing personal experiences; however, they can contribute to guiding life-long learners along their life's path. It is acceptable to have different journeys. An identifiable constant is the mindset of learning from the past to inform the future. In these beliefs, the substitute teacher also has the power to follow a child's power and lead them through a continuing reconstruction of classroom interactions. In *Experience and Education* (1938), Dewey explains that

Continuity and interaction in their active union with each other provide the measure of the educative significance and value of an experience. The immediate and direct concern of an educator is then with the situations in which interaction takes place. The individual, who enters as a factor into it, is what he is at a given time. It is the other factor, that of objective conditions, which lies to some extent within the possibility of regulation by the educator. As has already been noted, the

phrase "objective conditions" covers a wide range. It includes what is done by the educator and the way in which it is done, not only words spoken but the tone of voice in which they are spoken. It includes equipment, books, apparatus, toys, games played. It includes the materials with which an individual interacts, and, most important of all, the total *social* set-up of the situations in which a person is engaged. (pgs. 44-45)

Substitute teachers are capable of establishing objective conditions similarly to any other educator. Their teaching presence and selection of instructional materials to engage students throughout an instructional day all contribute to social interactions. Dewey did not distinguish between types of educators in his description, neither should a school community.

To recognize and celebrate educators within a school community, why not add Substitute Teacher of the Year to the other types of annual programs such as Teacher of the Year, Principal of the Year, Assistant Principal of the Year and Noninstructional Employee of the Year? These types of programs celebrate a school district's outstanding employees who have dedicated themselves to support student success. For substitute teachers, school community members would nominate and vote to select their choice for Substitute Teacher of the Year. This opportunity creates additional data on how substitute teachers perform in classrooms and supports this role as valued school community members with a viable pathway towards becoming permanent teachers.

### ***Faculty Conversations and Teachers' Lesson Plans***

Teachers comprise the largest number of employees on a school campus. As a collective, they have the greatest potential to build strong and productive relationships

with new substitute teachers. Teacher absences are inevitable; however, time and effort dedicated to plan and prepare for any absence speaks volumes to their confidence in the substitute teacher assigned to their class/es. The mixed impressions substitute teachers felt when meeting and conversing with teachers is a missed opportunity to maximize teaching and learning. If interactions do not go beyond causal pleasantries exchanged during a school day, the substitute teacher will be unable to fully internalize what is expected, leading to disappointing performance. Teachers must recognize that substitute teachers are integral to their classroom success. Increased opportunities for productive school days eliminate the need to repeat or discount what the students did with a substitute teacher if perceived as a day of “busy work” by teachers. These perceptions will not positively impact student achievement, which is top priority for teachers.

Lesson plans are a necessity relied upon by substitute teachers to fulfill the teacher’s intentions for the school day. Bell to bell instructions guide a new substitute teacher effectively. Despite a permanent teacher’s best intentions, a day’s lesson plans may not fill an entire school day. Study participants were not concerned if a gap in time was needed to be filled with a supplemental activity. They had their “sub pack” or “bag of tricks” to instantaneously select an activity appropriate as a filler activity. However, it is a missed opportunity if a classroom teacher does provide the substitute teacher with detailed and comprehensive lesson plans. This is not to be confused with lesson plans the teacher develops on a daily or weekly basis for themselves. Often, fine details are omitted creating gaps that the permanent teacher performs daily, but not the substitute teacher. Necessary information includes bell schedules, seating charts, emergency protocols, special instructions, dismissal procedures, etc. Lesson plans should be



inclusive of bell-to-bell instruction to engage the students in lessons and activities. If technology is integral to the lesson or activity, step-by-step guides on how to set-up the equipment is needed.

A substitute teacher lesson plan template would facilitate a standardized format for all teachers at a school to follow when creating and preparing for a planned or emergency absence. This positions the substitute teacher for success with access to the lessons, activities, procedures, and schedule for the day. Without lesson plans, the new substitute teacher is left with minimal or irrelevant materials to use throughout the school day. This is easily understood by the students as busy work thus creating unnecessary disruptive behaviors that could have been eliminated with proper planning and preparing by the classroom teacher. In addition, a regular review by elementary grade chairs or secondary department heads (supplemental position eligible for additional compensation) of each teacher's substitute plans from their respective groups would serve two purposes. First, designated school leaders would notice if anything was missing and secondly, a review of the lessons and activities could minimize busy work and afford opportunities to reinforce or expand appropriate grade level and/or subject content. If these teacher leaders were remiss with this responsibility, school administrators need to intervene and correct the situation expeditiously.

The inclusion of "how to write substitute teacher lesson plans" to a course syllabus is a recommendation to support the work and importance of substitute teachers. By adding the topic to a course within an initial teacher preparation program or as a performance task within an alternative certification program would give substitute teachers an advantage. It would not take an exorbitant amount of time to inform and

teach future or second career educators how to adequately create substitute teacher lesson plans. Emergency lesson plans are intended to cover approximately three days plans and are used for unexpected absences. Other lesson plans are written for those instances when an absence is scheduled. These plans are more closely aligned to what the students are currently learning in class. Either way, this is a non-negotiable expectation of teachers by administrators to ensure the school day runs smoothly for the students and substitute teachers.

### ***Substitute Teachers' Mindset in Classrooms***

New substitute teachers unequivocally spend most of their time during the school day with students. Beyond building relationships with administrators, faculty and staff, students rightfully deserve a substitute teacher's full time and attention. When conditions are favorable, all is well for the substitute teacher and students. Unfavorable conditions creates the potential for missed opportunities for substitute teachers. To counteract such occurrences, the mindset of the substitute teacher from the moment he/she arrives on campus is as an instructional leader. This does not mean the substitute teacher is identical to the permanent teacher, however it does mean that the substitute teacher has the potential to fulfill the day to the best of his/her ability as the guest teacher. This description not only applies to how others perceive substitute teachers. It also must be internalized.

A substitute teacher is much more than a "fill in" to "save the day." A substitute teacher is a flexible instructional leader. They are available to help and move around with ease compared to full-time teaching. This affords school communities ample opportunities to advance the position. As previously discussed, substitute teachers chose

to work as such and often have the same requirements as someone on a temporary teaching certificate pursuing an alternative certification pathway towards a professional certificate. This demonstrates that substitute teachers possess more than mere entry level skills to be valued as members of a school community. To shift the mindset from a fill in teacher to guest teacher, a recommendation is that beginning in Kindergarten, students are taught what and why substitute teachers are in a school and refer to them as guest teacher. Children are familiar with guests. They know how to behave around a guest. Why not reinforce and apply this to a substitute teacher? A student's first impression with a stranger in uncharted territory does not fare well for the future. As part of a school culture, school administrators can lead by example with this no cost, no excuse consistent message. Time with substitute teachers will vary as a child progresses through the grades, however, it is to be expected.

A public school system could afford the opportunity for administrators and teachers to examine and clearly understand the role and responsibilities of substitute teachers. In ECSD's Substitute Teacher Training, expectations of substitute teachers are presented at the start of the session (see Table 7). The listed basic rules of conduct are not intended to be humorous, yet, the inclusion of such behaviors does not contribute to a positive image or impression of a new substitute teacher. What about capturing what substitute teachers expect from the school community? Substitute teachers should be asked to identify what they need to effectively perform the expected role and responsibilities. What rules of conduct do substitute teachers have for school leaders, faculty, and staff to embrace and support their instructional practices and activities? This content is recommended to be included during an annual workday training session

conducted immediately preceding the new school year. A reciprocal relationship is then possible to ensure substitute teachers are supported and recognized for performing what is expected, and what is not accepted.

**Table 7**

*ECSD's Rules of Engagement for Substitute Teachers*

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<b>Substitute Teacher Responsibilities</b>
Be on time and work the assigned hours
Follow lesson plans provided to ensure continuity of instruction
Always supervise students
Stay on campus during entire assignment, including lunch
Keep student attendance records
Be flexible as assignment may be changed as needed
Maintain your own schedule in SmartFind
Perform other duties requested by Principal/school

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<b>Reporting for Assignments</b>
Wear your ECSD identification badge
Report to the school's administrative office
Check-in with the sub coordinator
Your assignment may be changed based on needs
Confirm access to the teacher's Canvas course with the sub coordinator
Receive substitute teacher folder
Map of school, schedules, and emergency procedures
Check your Canvas dashboard for access to the teacher's course.
Punch in/out using Kronos time clock or follow directions given by the location

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<b>COVID-19 Rules of Conduct</b>
Do not come to work if you are sick or have been exposed to COVID-19
Cancel your assignment in SmartFind and contact the school
All staff are required to wear a mask while on campus
Students and staff should remain at least six (6) feet apart from one another

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<b>Basic Rules of Conduct</b>
Do NOT administer medication to students
Do NOT use personal technology for personal use while in the classroom with students
Do NOT flirt, call, text or use social networks to contact students
Do NOT discuss your personal relationships or situations with students
Do NOT show inappropriate videos, websites, etc.
Do NOT transport students in your personal vehicle

Do NOT allow students to leave during the school day  
Do NOT fall asleep!  
NO Soliciting  
Do NOT touch the students!

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Bandura's (1977) personal efficacy, derived from four principle sources of information, was pivotal for a substitute teacher to gain experience and familiarity with a school that promoted social interactions. Substitute teachers perceived their actions were effective and made a difference. Participants felt much better about themselves after they believed they could handle instructional and behavioral tasks successfully. "Seeing people similar to oneself succeed by perseverant effort raises observers' beliefs about their own abilities" (Bandura, 1998, p. 54). The mindset of a substitute teacher was to maintain continuity of student learning with a perceived power or control of what goes on in the classroom. Efficacy beliefs are shaped by past experiences that inform present matters (Bandura, 1998). These matters emerge from performance accomplishment, vicarious experiences, verbal or social persuasion and physiological or affective states (Bandura, 1977) present in this case study's findings that answered each research question.

### **Preparation and Ongoing Development of Substitute Teachers**

The final group of recommendations focus on the preparation and ongoing development of new substitute teachers. The inclusion of first-hand experiences advances preparation and develop from merely reading and listening about the work to talking and learning how to do the work. These experiences may be the missing piece to validate one's decision to become a substitute teacher.

### *Substitute Teachers as Classroom Observers*

The lack of data coded as vicarious experiences (Bandura, 1977) or opportunities to observe others modeling a task is a missed opportunity for the substitute teacher. “Models are a source of aspiration, competencies, and motivation” (Bandura, 1998, p. 54). If the substitute teacher genuinely wants to improve their instructional strategies, they need to be proactive and seek opportunities to observe other substitute teachers with a proven track record of effectiveness. Ideas are collected through observation and discovery (Trotter & Wragg, 1990). This is not to say that observing permanent teachers would not increase one’s knowledge and skills; however, those that work in the same position share a commonality and perspective. Outsiders’, or non-substitute teachers’ perceptions are different than how substitute teachers perceive interactions. As a collective, social interactions between substitute teachers constructs a unique camaraderie (Dewey 1897, 1938). Depending on one’s prior work experience or background, there’s always something new to learn when working with students in a classroom. Just because all adults spent time in class with substitute teachers as students, that does not automatically mean they have the requisite skills to be successful substitute teachers. Finally, when one substitute teacher recognizes another substitute teacher for a job well done this influences one’s level of confidence as a guest teacher.

These observations are possible if and when the sub coordinator in collaboration with elementary grade chairs or secondary department heads create a schedule of opportunities for the substitute teacher. For example, a classroom visit could be planned during the substitute teacher’s non-student contact time during a school day. These non-evaluative observations would respectfully be scheduled ahead of time, or, if the school

has a culture of opening classroom doors where teachers are encouraged, not obligated, to welcome visitors into their rooms (Hite & Donohoo, 2021).

### ***Substitute Teacher Training as an Online Learning Experience Only***

Pivoting to online learning amid the COVID-19 pandemic included the required training for new substitute teachers. What once was a six-hour in person training was reduced to a four-hour online training. During the onsite training model, participants were seated at tables to support conversations and collaborative group work. Trainers engaged participants in group work strategies and modelled types of cooperative learning and instructional methods to use in the classroom with students. Facilitation strategies such as chunking content, participant movement, opportunities for participant voices and use of music accentuated opportunities for the new substitute teachers to actively engage in the learning. Throughout the entire training, participants were encouraged to ask questions of the four different trainers to deepen their understanding of the presented content.

District staff selected content that substitute teachers needed to know and how to teach during a hybrid model of instruction with some students in class and other students online. Although the material presented was appropriate content, the lack of adherence to Knowles (1980) adult learning principles applied to online training was a missed opportunity. It is nearly impossible to comprehend how to use digital tools by listening to a presenter without hands-on practice. Although a personal device was needed to participate, new substitute teachers would often join the Microsoft Teams meeting from a cell phone which limited any opportunity for student engagement. Participants spent hours staring at a computer screen while experts presented, or verbally downloaded,

information necessary to prepare them for working as a substitute teacher. Feedback indicated that the session did not meet expectations and would have benefitted from reducing content to only include policy related information. Some procedures, strategies, or activities presented were not even possible in classrooms with predominately online teaching and learning. Despite the entire training being recorded via Microsoft Teams and available from a link within the chat feature of the communication platform, there was too much information shared without opportunities for participants to fully process and understand what was presented.

Online learning is not new, however, the COVID-19 pandemic created an immediate need to pivot from in-person to virtual training. Despite efforts by ECSD to prepare professional development providers with the digital tools, it neglected to consider the needs of an adult online learner nor did it address modifications necessary to a training design. It was all about availability of electronic devices and access to virtual platforms. For the Substitute Teacher Training, there were missed opportunities. In her article on redesigning an online course, Leslie (2021) describes how she utilized adult learning principles and a framework to engage students for an undergraduate course. Her successes are take-aways applicable to the Substitute Teacher Training. For instance, participants were not presented with authentic instructional or behavioral problems and given an opportunity to discuss plausible solutions. Seeking input from participants for creative ideas during the training would have strengthened the overall design. For new content presented, the use of digital formative assessments would have gauged how well the participants were comprehending the new knowledge. Showing video clips from ECSD classrooms to view experienced substitute teachers in action followed by guided



discussions would have strengthened an understanding of the position's role and responsibilities. Finally, there was no opportunity for the participants to complete an exit ticket and offer ECSD feedback prior to the close of the session. Lessons learned since the onset of the COVID-19 pandemic will continue to serve as an impetus to redesign an online training inclusive of adult learning principles.

Andragogy is a theory specifically for adult learners. In this study, training providers designed and delivered professional development for adult learners. Knowles (1980) refers to this concept as a learning-design model.

By "learning design model" I simply mean a process plan – a projection of a flow of events – for accomplishing a given set of objectives in a sequence guided by a conceptual schema, such as the steps in an operation, the performance of a role, the functions of an organizational unit, or an integrating theme (p. 236).

Concentrating on the performance of a substitute teacher as the role, it was imperative that a high quality professional development opportunity reflected application of Knowles' (1980) four principles of andragogy and was essential to any training session. For the Substitute Teacher Training, the assumptions applied for the target audience. The new substitute teachers needed to know the purpose and benefits of the new learning from the trainers, who also acknowledged participants' higher education and/or work experiences to strengthen discussions and deepen understanding of the content. During the training, participants exercised responsibility for their own learning which improved with a mindset or readiness to learn. The inclusion of problem-solving techniques by the trainers were appropriate for new substitute teachers and supplemented personal motivation to work with students in classrooms.

A recommendation to connect adult learning principles to the real work as a substitute teacher is by inviting active ECSD substitute teachers to the training. The sharing of authentic experiences lends credibility to the content presented by trainers. The inclusion of first-hand experiences advances the training from merely reading and listening about the work of a substitute teacher to talking and learning how to do the work in Kindergarten through twelfth grade classrooms. Hearing advice from the substitute teachers about what they did not know before they started, that they know now, may be the missing piece to validate the decision to become a substitute teacher.

Training is intended to create a change in behavior for the adult learner. To maximize this outcome, change in the training design may be advantageous. Differentiating opportunities based on the new substitute teachers' interests, level of knowledge, and experience is a recommendation. Trainings could be offered by level (elementary, middle, or high), for general education classes or special education classes. Trainings for non-core or elective courses would create a unique pool of substitute teachers for fine arts, health and fitness or career/technical classes. This requires time and opportunity for additional planning and preparing by the training providers. Oversight of these efforts is necessary from district leaders, such as the Human Resources Chief and Director of Instructional Staffing to inspect what is expected. Efforts to outsource the recruitment, development and employment of substitute teachers to a national organization is being discussed and considered. Does this potential action implicate ECSD's struggle to sustain substitute teachers who consistently accept job assignments? Or, is it a viable option to meet the need for more substitute teachers? If ECSD is unable to effectively accomplish what's needed, then choosing a staffing

company as a workforce solution may be the right next decision. Either way, the potential result is a strong pool of substitute teachers who are developed to maintain cohesion of the student learning (Duggleby & Badali, 2007) in the absence of the permanent teacher.

### **Future Research**

Observing substitute teachers in classrooms with students was not an option for this case study due to the COVID-19 pandemic and restriction on in-person research by the research site, yet optimal for future research. A classroom observation, whether announced or not, would broaden self-reported experiences by new substitute teachers in a Kindergarten through twelfth grade public school. It could also reveal if teaching comes naturally to the substitute teachers. Time spent in a classroom observing a substitute teacher's practice to gain relevant instructional experiences that support their descriptions of experiences would inform how to supplement their development. In addition, the substitute teacher is learning by doing the job, interacting with children in the classroom and adults on campus towards recognition as a valuable school community member.

The concept of collective efficacy is a shared belief that through collective action student outcomes will improve, including those for disengaged or disadvantaged students (Hite & Donohoo, 2021). If substitute teachers were supported and provided an opportunity to assemble as a community of learners, this would support Hite and Donohoo's (2021) belief that "clearly, it's important for district leaders, school leaders, informal leaders, and classroom educators to understand what collective teacher efficacy is and why it is important in relation to improving student outcomes and confronting and

addressing inequity” (p. xv). Although the issue of inequity was not included within the design for this case study, it will be noted as a timely and relevant topic for future research. Inviting all of these substitute teachers to join in the shared belief of collective efficacy is a timely and relevant topic for future studies. By creating this space for substitute teachers as members of the team, they will believe in a combined ability to positively impact student outcomes (Hite & Donohoo, 2021).

Future qualitative studies will expand the body of work to capture characteristics of infrastructures to recruit, develop, and retain substitute teachers as active members of a school community. Recruitment efforts create pathways to encourage an individual to become a substitute teacher. Development includes substitute teachers who enroll in a teacher preparation program in higher education or need training. Professional learning may be necessary for second-career professionals or retired professionals pursuing temporary employment as a substitute teacher. If done correctly, then an education system is able to retain a pool of substitute teachers. This sustainability confirms an individual’s desire to pursue substitute teaching. Finally, ongoing support and professional acknowledgements are contributors to continued employment. These characteristics are intended to capture results, with far-reaching implications, to inform the existence of an ever-growing group of educators.

Quantitative studies are suited to capture data on the qualifications of substitute teaching. For instance, studies on the gender to determine if men or women are more likely to work as a substitute teacher. Males may seek long-term, temporary or full-time jobs while serving as a substitute teacher. This work may be suitable for females to balance family and employment. Separating male and female intentions uses gender as a

lens to interpret the work of substitute teachers (Duggleby & Badali, 2007). Substitute teachers must possess minimum qualifications to qualify for employment and these differ by school systems. Another major category for study is salary comparisons. Examples include the margin of difference between the hourly rates of a permanent teacher compared to a substitute teacher, practice of applying a sliding scale of rates based on education degree/s earned and pay differential for daily or interim positions. Due to the daily need for substitute teachers, a sufficient number are needed to match teacher absences. The intent is for all positions to be filled without any remaining unfilled. Finally, to maintain an active status and reasonable assurance for continued work, there may be an established minimum number of days a substitute teacher must work to maintain eligibility. These represent opportunities for quantitative studies that are relevant and pertinent to expose findings and subsequent discrepancies concerning substitute teachers. Research that further supports the needs of substitute teachers to inform actions towards a positive impact reinforces past and present studies on the importance of this area to study.

### **Final Thoughts**

Individuals become substitute teachers for diverse reasons. Some are attracted to the work for the flexibility. Providing primary care to elderly parents or young children requires availability of time during the day for appointments or activities. Still others elect to be substitute teachers as a second job to supplement their income. Retired professionals have also found substitute teaching to be an ideal job to stay active and provide a needed service. Retirees are often former classroom teachers, first-responders or military personnel with knowledge and skills to positively impact student outcomes.

One unique substitute teacher with a passion for teaching needed to take time away to compete in the 2021 Summer Olympics in Tokyo representing the United States in karate (Northrop, 2021).

This case study used what is understood and practiced about andragogy, self-efficacy and social constructivism to contribute to the characterization of classroom teaching experiences by the participants. New substitute teachers as adult learners exhibited a desire to learn, were motivated, and believed they were capable of being an effective substitute teacher. Training contributed to a level of confidence to serve as an instructional leader in the absence of the permanent teacher. Additionally, substitute teachers with strong social connections translated that experience to their performance in the classroom. A current trend in education for school leaders and instructional leaders that acts on andragogy, self-efficacy and social constructivism is referred to as collective efficacy. As a result of the findings from this case study, collective efficacy can and should include the work of substitute teachers.

Substitute teachers should be included in that group of classroom educators and recognized as contributors to improving student outcomes. The core of collective teacher efficacy is built on Bandura's (1977) sources of efficacy beliefs. "As school communities learn and grow together, they are able to persevere through the complex challenges of education in order to positively impact adult relationships, student achievement and issues of inequity" (Hite & Donohoo, 2021, p. 112). School leaders are empowered to carefully examine how they can unpack and reassemble practices that need to be improved, such as valuing a substitute teacher within a school community.

To be a substitute teacher is a personal choice. All adults probably remember what it was like in school to spend the day with a substitute teacher. All full-time teachers can describe what it was like to return to their classroom after their students spent a day or two with a substitute teacher. All substitute teachers can express what it was like to spend the day in a classroom with students. The commonality in each memory is the substitute teacher. Why would anyone want anything other than a positive memory of the experience? By understanding the perceptions of new substitute teachers, a new direction to improve their work was justified as a result of this case study. They are an indispensable part of a public school system. Among this study's 32 participants, not one indicated they were going to stop working as a substitute teacher. The current status with 50% of the interviewees as current full-time employees with ECSD clearly demonstrates how viable they are as future school community members.

Those who lead change efforts by building awareness towards teacher absences are the same ones who automatically release responsibility of groups of children to substitute teachers. Trust in the process is presumed without any regard to the skill, knowledge or confidence level of the individual in the position. Once the classroom door is closed, a critical epiphany is to remove the word "substitute" and focus on the "teacher." Substitute teachers share the belief that educators are lifelong learners. Embracing these teachers as valued school community members along with an optimistic outlook will contribute to a strong pool of guest teachers. The lesson learned is that there is no substitution for the experiences of a substitute teacher!

## **APPENDICES**



## Appendix A

### Case Study Timeline

<b>Date</b>	<b>Case Study Procedures/Methods</b>	<b>Sample</b>	<b>Data Collection/Tool</b>	<b>Time</b>
December 15, 2020 – March 18, 2021	Propose Dissertation Study; Revise Chapters 1-3; Submit IRB Applications	N/A	N/A	13 weeks
March 18 – June 23, 2021	IRB Approval Process	N/A	N/A	15 weeks
June 29, 2021	Recruit Participants; Email post-training survey link to recruited participants	Substitute Teachers ( <i>N</i> = 75)	Recruitment Script; Survey Protocol; Online Survey instrument	1 hour; 3 weeks to respond; follow-up at week 2
July – August 2021	Recruit Participants for Interview; Email recruited interview candidates to schedule interview	Subset of Survey Participants ( <i>N</i> = 10)	Recruitment Script; Interview Protocol	30 minutes; 1 week to respond; follow-up at week 2
July 2021	Collect Artifacts	( <i>N</i> = 4)	Artifact Analysis List	1 day
July 2021	Artifact Analysis	( <i>N</i> = 4)	Artifact Analysis Protocol	6 hours
July - August 2021	Schedule Interviews	Substitute Teachers ( <i>N</i> = 10)	Microsoft Bookings	1 hour
July - August 2021	Conduct Interviews	Substitute Teachers ( <i>N</i> = 10)	Interview Protocol	Approximately 30 minutes per interview; 5-7 hours total
August-September 2021	Analyze Data	N/A	Coding	2 months
October - December 2021	Write Findings; Chapters 4 and 5; Revise Dissertation Paper	N/A	Microsoft Word	3 months
January 2022	Dissertation Defense	N/A	PowerPoint	3 weeks

## Appendix B

### Recruitment Script – Survey

Congratulations on completing Broward County Public Schools' Substitute Teacher Training! If you have worked at least 10 full days as a substitute teacher at an elementary, middle, combination (K-8 or 6-12), or high school, you are invited to participate in our research study.

The purpose of the study is to understand your perceptions of initial teaching experiences in a Kindergarten through twelfth grade public school classroom. This study will support an optimistic view of new substitute teachers to raise recognition, trust and respect from the education community that relies on their service to alleviate interruptions and contribute to productive school days.

We respectfully request your voluntary participation by completing an online survey at this link: **Take the Survey**

Or copy and paste the URL below into your internet browser:

[https://fau.az1.qualtrics.com/jfe/form/SV\\_6R93OiRi8zkCRiC?Q\\_DL=hwXldBcI7IUyNy\\_u\\_6R93OiRi8zkCRiC\\_MLRP\\_curonCTKpycDHb7&Q\\_CHL=email](https://fau.az1.qualtrics.com/jfe/form/SV_6R93OiRi8zkCRiC?Q_DL=hwXldBcI7IUyNy_u_6R93OiRi8zkCRiC_MLRP_curonCTKpycDHb7&Q_CHL=email)

It should take you no more than 15-20 minutes to complete the online survey. Your participation in this study is your choice. You may skip any questions that make you feel uncomfortable and you are free to withdraw from the study at any time without penalty. The risks involved with participating in this study are minimal.

Potential benefits that you may receive from participation include recognition and respect for a substitute teacher within a school community as a confident, prepared and professional educator. School communities expect the substitute teacher to be prepared to enter new environments effectively. Working as a substitute teacher and gaining this time in a classroom is a viable pathway to permanent or full-time teaching positions.

If you experience problems or have questions regarding your rights as a research subject, contact the Florida Atlantic University Division of Research at (561) 297-1383. For other questions about the study, you should call or email the investigator(s) Michelle Vaughan at [mvaughan3@fau.edu](mailto:mvaughan3@fau.edu) or Linda Whitehead at 754-702-8225 or [lwhitehead@fau.edu](mailto:lwhitehead@fau.edu).

By completing and returning the online survey, you give consent to participate in this study. If you choose, you can print a copy of the consent statement for personal records.

## Appendix C

### Survey Protocol

Criteria for Sample: All participants must have successfully completed the Substitute Teacher Training and meet the eligibility requirements to work as a new substitute teacher in ECSD. The researcher will recruit substitute teachers to participate via email. Requested contact information will include full name and email address. Participants must have verified employment of at least 10 full days or two weeks of substituting in their initial nine weeks as a substitute teacher.

Working Title of Study: No Substitution for Substitute Teaching Experiences: A Case Study Exploring Perspectives of New Substitute Teachers

Purpose: The purpose of this case study is to describe how new substitute teachers perceive their first 10 full days of working within an initial nine (9) weeks of classroom teaching experiences following the Substitute Teacher Training in order to contribute to personal preparedness, social interactions with administrators, teachers and staff and improve the design of training.

Survey Questions:

*Survey questions adapted with permission from the Substitute Teaching Division of STEDI, LLC (STEDI.org) licensed by Utah State University.*

#### Part I – Information for Participant Demographics

How do you identify with your gender?

- Male
- Female
- Other:

Age:

- 18-29
- 30-39
- 40-49
- 50-59
- 60+

Do you hold a bachelor's degree?

- Yes
- No
- If yes, what was your major?

What is your race/ethnicity? (Note: lists align to District's reporting of student demographics)

- White
- Black
- Asian
- Native American or Native Alaskan
- Native Hawaiian or Pacific Islander

Are you:

- Hispanic
- Non-Hispanic

Are you:

- Currently enrolled in a College of Education and/or Student Teacher
- Former Classroom Teacher
- Retired Classroom Teacher
- Substitute Teacher with prior substitute teaching experience
- Active Military
- Retired Military
- Active First-Responder
- Retired First-Responder
- Other:

### **Part II – Questions about your classroom experiences**

1. Describe how you feel walking into the classroom before the school day begins.
2. Do you feel confident around teaching?
  - a. Yes, please explain
  - b. No, please explain
3. Which method of controlling the behavior of students do you use the most?
  - a. Report the students involved in disruptive conduct to school administration.
  - b. Leave a written report for the regular teacher citing the names of disruptive students.
  - c. Call or write a note to the parents of the most disruptive students.
  - d. Control your actions.
  - e. Other:
4. As a substitute teacher, what do you spend the most time doing during the day?
  - a. Encouraging the quiet, shy children.
  - b. Praising students who are behaving appropriately.
  - c. Correcting students who are behaving inappropriately.
  - d. Keeping the group of students in the back of the classroom on task.
  - e. Other:

### **Part III – Questions about your interactions with Administrators, Faculty and Staff**

5. How do you communicate with the permanent teacher even though you may not meet him/her?
6. Have you met any school administrators?
  - a. Yes
    - i. What did you talk about?
  - b. No
7. How do you get to know full-time teachers at a school?
8. What are your experiences meeting and working with staff? Examples include front office staff, support staff such as Literacy Coach, ESE Specialist and/or Guidance Counselor, Custodians, or Cafeteria workers.

#### **Part IV – Questions about the Substitute Teacher Training**

1. How do you feel about your ability to select and use activities when the permanent teacher's lesson plans are not enough to fill a school day?
2. Did you learn how to do this from the Substitute Teacher Training?
  - a. Yes
  - b. No
  - c. Other:
3. What did you think about the Substitute Teacher Training?
4. What topic from the training was:
  - a. most useful for you?
  - b. least useful for you?
5. What recommendations do you have for future topics?

#### **Additional Opportunities**

For the next part of this study, are you open to being contacted for further voluntary participation? If so, I will email you to schedule a virtual one-on-one interview via a video meeting (with or without webcam). The interview will take around 30 minutes. Your identity will be confidential by changing your name to a pseudonym (fictitious name) for this study. In appreciation for your time, you will receive a \$10 Amazon or Target eGift Card after the interview. If interested, please enter your email below and you will be contacted about an interview.

## Appendix D

### Recruitment Script – Interview

Good Afternoon! THANK YOU for completing my survey as a BCPS substitute teacher! You are receiving this email from me because you entered your email address in the last survey item indicating your willingness to continue participation with a one-on-one interview.

To schedule a mutually convenient time for an interview from July 19 - August 1, please click on my Booking link below. Included in the Booking will be the Microsoft Teams link that you will use on the day of the interview.  
<https://outlook.office365.com/owa/calendar/FloridaAtlanticUniversity1@browardcountyschools.onmicrosoft.com/bookings/>

Attached is an Interview Consent form required prior to the interview. Kindly review and complete the bottom of page 2 on the .pdf by using the "fill and sign" (purple pencil icon). If you are unable to complete electronically, you can print, sign and scan or print, sign and take a picture of the page. It can be emailed to me at: lwhitehead@fau.edu

The interview will be virtual, up to 30 minutes, with questions focusing on your experiences working as a Substitute Teacher. You will remain anonymous throughout the study - I will not use your real name. **As a token of my appreciation, I will send you a \$10 eGift Card to either Target or Amazon (your choice) following our interview.**

Please reach out if I can be of any assistance. Look forward to virtually meeting/talking with you soon!

## Appendix E

### Interview Protocol

Criteria for Sample: All participants must have successfully completed the Substitute Teacher Training and meet the eligibility requirements to work as a new substitute teacher in ECSD. The researcher will recruit new substitute teachers to participate via email. Requested contact information will include full name, email address and phone number for each participant. Each interviewee must have verified employment of at least 10 full days or two weeks of substituting in their initial nine weeks as a substitute teacher.

Working Title of Study: No Substitution for Substitute Teaching Experiences: A Case Study Exploring Perspectives of New Substitute Teachers

Purpose: The purpose of this case study is to describe how new substitute teachers perceive their initial nine (9) weeks of classroom teaching experiences following the Substitute Teacher Training in order to contribute to personal preparedness, social interactions with administrators, teachers, and staff and improve the design of training.

Name of Interviewer: Linda S. Whitehead

Name of Interviewee:

Place:

Date:

Start Time:

End Time:

#### Introduction:

Thank you for participating. The purpose of my study is to describe how new substitute teachers describe their initial teaching experiences in a Kindergarten through twelfth grade public school classroom after participation in the Substitute Teacher Training. This interview will be around 30 minutes and may take more or less time depending on the conversation. May I have your permission to audio record the interview? We will begin at xx:xx am/pm.

#### Interview Questions and Probes:

*Interview questions adapted with permission from the Substitute Teaching Division of STEDI, LLC (STEDI.org) licensed by Utah State University.*

### **Part I – Information for Participant Demographics**

How do you identify with your Gender?

- Male
- Female
- Other: \_\_\_\_\_

Age:

- |                                |                                |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> 18-29 | <input type="checkbox"/> 50-59 |
| <input type="checkbox"/> 30-39 | <input type="checkbox"/> 60+   |
| <input type="checkbox"/> 40-49 |                                |

Do you hold a bachelor's degree?

- Yes  
 No  
 If yes, what was your major? \_\_\_\_\_

What is your race/ethnicity? *(Note: lists align to District's reporting of student demographics)*

First, select one from this list:	Next, select one from this list:
<input type="checkbox"/> White	<input type="checkbox"/> Hispanic
<input type="checkbox"/> Black	<input type="checkbox"/> Non-Hispanic
<input type="checkbox"/> Asian	
<input type="checkbox"/> Native American or Native Alaskan	
<input type="checkbox"/> Native Hawaiian or Pacific Islander	

Are you:

- |  |  |
|--|--|
| <input type="checkbox"/> Currently enrolled in a College of Education and/or Student Teacher | <input type="checkbox"/> Active Military         |
| <input type="checkbox"/> Former Classroom Teacher  | <input type="checkbox"/> Retired Military        |
| <input type="checkbox"/> Retired Classroom Teacher   | <input type="checkbox"/> Active First-Responder  |
| <input type="checkbox"/> Substitute Teacher with prior substitute teaching experience        | <input type="checkbox"/> Retired First-Responder |
|  | <input type="checkbox"/> Other: _____            |

**Part II – Questions about your classroom experiences**

1. How would you describe your confidence to teach before and after being in the classroom?
  - a. What has impacted that difference?
2. How do you prepare yourself for presenting lessons in the classroom?
3. How do you keep students on task while they are working on the necessary assignment?
4. Have you taught any lessons? Explain how you engage students to increase active participation.
5. Tell me about a time when you prevented and/or addressed inappropriate student behavior.
6. Describe your experience with easy-to-follow lesson plans from the permanent teacher.
  - a. How often do you find detailed plans?
  - b. How often are little-to-no plans available?
7. Describe your confidence in continuing the learning while the permanent teacher is absent.

**Part III – Questions about your interactions with Administrators, Faculty and Staff**



8. How do you feel when you meet and talk with school administrators?
9. When working with full-time teachers as a substitute teacher, describe how they talk to you.
10. Tell me how you approach working and talking with staff. Examples include front office staff, support staff such as Literacy Coach, ESE Specialist and/or Guidance Counselor, Custodians, or Cafeteria workers.

**Part IV – Questions about the Substitute Teacher Training**

11. To what degree did the training you received increase your confidence level as a substitute teacher?
12. What did you need to know before you started working as a substitute teacher that you know now?

## **Appendix F**

### **Artifact Analysis Protocol**

1. Name of Artifact
2. Date Received
3. Website, if applicable
4. Description
5. Significance

## Appendix G

### Data Crosswalk

Research Question 1 (RQ1): What are self-reported experiences by new substitute teachers in a Kindergarten through twelfth grade public school?

- a. How do new substitute teachers describe their classroom experiences?
- b. How do new substitute teachers describe their experiences with administrators?
- c. How do new substitute teachers describe their experiences with faculty?
- d. How do new substitute teachers describe their experiences with staff?

Research Question 2 (RQ2): What factors do new substitute teachers believe influence their confidence for instruction?

Research Question 3 (RQ3): What do new substitute teachers perceive are the strengths and weaknesses of the required training they completed for eligibility as a substitute teacher?

Research Questions	RQ1	RQ1 a	RQ1 b	RQ1 c	RQ1 d	RQ2	RQ3
<b>Survey Questions</b>							
Describe how you feel walking into the classroom before the school day begins.	X	X				X	
What has influenced your confidence around teaching?	X	X	X	X	X	X	X
How do you get students to follow classroom rules?	X	X				X	X
As a general practice, what do you spend the most time doing during the day as a substitute teacher?	X	X				X	
How do you feel about your ability to select and use activities when the permanent teacher's lesson plans are not enough to fill a school day?	X	X				X	X
How do you communicate with the permanent teacher even though you may not meet him/her?	X	X		X			X

What do you do when you meet the administrators at a school as a substitute teacher?	X		X			X	
How do you get to know full-time teachers at a school?	X			X		X	
What are your experiences meeting and working with staff? Examples include front office staff, support staff such as literacy coach, ESE specialist and/or guidance counselor, custodians, or cafeteria workers?	X				X	X	
What topic from the training was the most useful for you?						X	X
What topic from the training was the least useful for you?						X	X
What recommendations do you have for future topics?							X
<b>Interview Questions</b>							
How would you describe your confidence to teach before and after being in the classroom? What has impacted that difference?	X	X	X	X	X	X	X
How do you prepare yourself for presenting lessons in the classroom?	X	X				X	X
How do you keep students on task while they are working on the necessary assignment?	X	X				X	X
Have you taught any lessons? Explain how you engage students to increase active participation.	X	X				X	X
Tell me about a time when you prevented and/or addressed inappropriate student behavior.	X	X				X	X
Describe your experience with easy to follow lesson plans from the permanent teacher. How often do you find detailed	X	X				X	X

plans? How often are little to no plans available?							
Describe your confidence in continuing the learning while the permanent teacher is absent.	X	X				X	X
How do you feel when you meet and talk with school administrators?	X		X			X	
When working with full-time teachers as a substitute teacher, describe how they talk to you.				X		X	
Tell me how you approach working and talking with staff. Examples include front office staff, support staff such as literacy coach, ESE specialist and/or guidance counselor, custodians, or cafeteria workers?					X	X	
To what degree did the training you received increase your confidence level as a substitute teacher?	X	X				X	X
What did you need to know before you started working as a substitute teacher that you know now?	X	X	X	X	X	X	X
<b>Artifacts</b>							
Substitute Teacher Handbook							X
Master PowerPoint Presentation							X
Facilitator Training Notes							X
STEDI.org website							X

## Appendix H

### Theoretical Framework Crosswalk

**Adult Learning Principles:**

ALP1: Adults need to learn through experiences that resemble real-world experiences

ALP2: Adults learn best with an immediate connection that is relevant to their work

**Self-Efficacy Principle Sources of Information:**

PER: Performance accomplishment through practice to gain relevant experiences

VIC: Vicarious experiences through observing others modeling a task

VER: Verbal persuasion is positive encouragement by someone perceived as credible

PYS: Physiological states that influence or decrease confidence to perform tasks

**Social Constructivism:**

SI: Social Interactions or behaviors between adults and children

LRG: Learning by doing or job-embedded learning

REC: Recognition by others contributing to experiences

Theory Codes	ALP1	ALP2	PER	VIC	VER	PHY	SI	LRG	REC
<b>Survey Questions</b>									
Describe how you feel walking into the classroom before the school day begins.			X		X	X			
What has influenced your confidence around teaching?			X	X	X	X	X	X	X
How do you get students to follow classroom rules?			X			X	X	X	

As a general practice, what do you spend the most time doing during the day as a substitute teacher?			X				X	X	
How do you feel about your ability to select and use activities when the permanent teacher's lesson plans are not enough to fill a school day?			X			X	X	X	
How do you communicate with the permanent teacher even though you may not meet him/her?			X				X	X	
What do you do when you meet the administrators at a school as a substitute teacher?			X	X	X	X	X	X	X
How do you get to know full-time teachers at a school?			X	X	X	X	X	X	X
What are your experiences meeting and working with staff? Examples			X	X	X	X	X	X	X

include front office staff, support staff such as literacy coach, ESE specialist and/or guidance counselor, custodians, or cafeteria workers?									
What topic from the training was the most useful for you?	X	X							
What topic from the training was the least useful for you?	X	X							
What recommendations do you have for future topics?	X	X							
<b>Interview Questions</b>									
How would you describe your confidence to teach before and after being in the classroom? What has impacted that difference?			X	X	X	X	X	X	X
How do you prepare yourself for presenting lessons in the classroom?			X	X	X	X	X	X	X



How do you keep students on task while they are working on the necessary assignment?			X			X	X	X	X
Have you taught any lessons? Explain how you engage students to increase active participation.			X			X	X	X	X
Tell me about a time when you prevented and/or addressed inappropriate student behavior.			X			X	X	X	
Describe your experience with easy to follow lesson plans from the permanent teacher. How often do you find detailed plans? How often are little to no plans available?			X			X		X	
Describe your confidence in continuing the learning while the permanent teacher is absent.			X	X	X	X	X	X	X

How do you feel when you meet and talk with school administrators?			X		X	X	X	X	X
When working with full-time teachers as a substitute teacher, describe how they talk to you.			X		X	X	X	X	X
Tell me how you approach working and talking with staff. Examples include front office staff, support staff such as literacy coach, ESE specialist and/or guidance counselor, custodians, or cafeteria workers?			X		X	X	X	X	X
To what degree did the training you received increase your confidence level as a substitute teacher?	X	X	X	X	X	X	X	X	X
What did you need to know before you started working as a substitute	X	X	X	X	X	X	X	X	X

teacher that you know now?									
<b>Artifacts</b>									
Substitute Teacher Handbook	X	X							
Master PowerPoint Presentation	X	X							
Facilitator Training Notes	X	X							
STEDI.org website	X	X							

## Appendix I

### A Priori Code List

<b>Classroom Experiences:</b> Situations with full classroom of students	<b>CEX</b>
<b>Classroom Teacher Communication:</b> Types of communication with the permanent, full-time teacher of record	<b>CTC</b>
<b>Confidence:</b> Self-reported awareness of confidence in substitute teacher role	<b>CON</b>
<b>Instructional Delivery:</b> Lesson presented to students	<b>ID</b>
<b>Interactions with Administrators:</b> School Principal, Assistant Principal	<b>IA</b>
<b>Interactions with Faculty:</b> Full-time Classroom Teachers	<b>IF</b>
<b>Interactions with Staff:</b> Full-time support staff and/or non-instructional employees	<b>IS</b>
<b>Lesson Plans:</b> The extent or quality of written and/or electronic plans provided and left by the classroom teacher to be used by the substitute teacher	<b>LP</b>
<b>Management:</b> Controlling behaviors of students	<b>MGT</b>
<b>Preparation/Planning:</b> Instructional actions by the substitute teacher prior to the start of the instructional day	<b>PP</b>
<b>Student Behaviors:</b> Situations with individual students	<b>SB</b>
<b>Student Engagement:</b> Level of activity, types of activities	<b>SE</b>
<b>Substitute Teacher Training:</b> Required District Training	<b>STT</b>
Strengths of required training	<b>STTS</b>
Weaknesses of required training	<b>STTW</b>
Recommendations for future trainings	<b>STTR</b>
<b>Substitute Teacher:</b> Work experience as temporary teacher in the absence of the classroom or permanent teacher	<b>ST</b>
<b>Adult Learning Principles</b>	
Adults need to learn through experiences that resemble real-world experiences	<b>ALP1</b>
Adults learn best with an immediate connection that is relevant to their work	<b>ALP2</b>
<b>Self-Efficacy - Principle Sources of Information</b>	
<b>Performance Accomplishment:</b> Practice to gain relevant experiences	<b>PER</b>
<b>Vicarious Experiences:</b> Observing others modeling a task	<b>VIC</b>
<b>Verbal Persuasion:</b> Positive encouragement by someone perceived as credible	<b>VER</b>
<b>Physiological:</b> States that influence or decrease confidence to perform tasks	<b>PHY</b>
<b>Social Constructivism</b>	
<b>Social Interactions:</b> Behaviors between adults and children	<b>SI</b>
<b>Learning:</b> Learning by doing or job-embedded learning	<b>LRG</b>
<b>Recognition:</b> By others contributing to experiences	<b>REC</b>

## Appendix J

### Codes, Categories, Themes

<b>RQ1:</b> What are self-reported experiences of new substitute teachers in a Kindergarten through twelfth grade public school?				
<b>Codes:</b> CEX, ID, LP, PP, SE, MGT, SB, IA, IF, CTC, IS, SI				
<b>Categories</b> • <b>Themes</b>	<b>Experiences as a Substitute Teacher</b> (CEX, ID, LP, PP) <ul style="list-style-type: none"> <li>• lesson plans (followed/not followed)</li> <li>• planning and preparing (with or without plans)</li> </ul>		<b>Experiences with Students</b> (SE, MGT, SB) <ul style="list-style-type: none"> <li>• student engagement (activities)</li> <li>• classroom management (what worked; what did not)</li> <li>• student behaviors</li> </ul>	
<b>Categories</b> • <b>Themes</b>	<b>Administrator Interactions</b> (IA, SI) <ul style="list-style-type: none"> <li>• one-on-one</li> <li>• friendly</li> <li>• talk about oneself/school</li> </ul>	<b>Faculty Interactions</b> (IF, CTC, SI) <ul style="list-style-type: none"> <li>• on-campus - informal</li> <li>• off-campus - emails, texts</li> </ul>	<b>Staff Interactions</b> (IS, SI) <ul style="list-style-type: none"> <li>• less time together</li> <li>• by role/scope of work</li> <li>• very specific about tasks</li> </ul>	
<b>Theoretical Framework</b>	<b>Social Constructivism</b> (SI, LRG, REC) <ul style="list-style-type: none"> <li>• social interactions. learning, recognition</li> </ul>			
<b>RQ2:</b> What factors do new substitute teachers believe influence their confidence for instruction?				
<b>Codes:</b> CON, ST, PP, LP, SE, SI, PER, VIC, VER, PHY, REC				
<b>Categories</b> • <b>Themes</b>	<b>Factors that Increase/Decrease Confidence</b>			
	<b>Self-Confidence</b> (CON) <ul style="list-style-type: none"> <li>• trait</li> <li>• confident</li> <li>• not confident</li> </ul>	<b>Content Knowledge</b> (PP, LP) <ul style="list-style-type: none"> <li>• familiarity or understanding of grade level content (increase/decrease)</li> </ul>	<b>Experience</b> (ST) <ul style="list-style-type: none"> <li>• more time as a substitute teacher (increase)</li> <li>• young substitute teacher mistaken for a student (decrease)</li> </ul>	<b>Building relationships with students</b> (SE, SI) <ul style="list-style-type: none"> <li>• rapport (increase)</li> <li>• more than one day (increase)</li> </ul>
<b>Theoretical Framework</b>	<b>Self-Efficacy</b> (PER, VIC, VER, PHY) <ul style="list-style-type: none"> <li>• performance accomplishment, vicarious experiences, verbal</li> </ul>			
<b>RQ3:</b> What do new substitute teachers perceive are the strengths and weaknesses of the required training?				
<b>Codes:</b> STT, STTS, STTW, STTR, ALP1, ALP2				
<b>Categories</b> • <b>Themes</b>	<b>Strengths of Training</b> (STT, STTS) <ul style="list-style-type: none"> <li>• content, resources, training design</li> <li>• application of new knowledge</li> </ul>		<b>Weaknesses of Training</b> (STT, STTW) <ul style="list-style-type: none"> <li>• lack of field experiences</li> <li>• virtual session (not hands-on; too long)</li> </ul>	
<b>Theoretical Framework</b>	<b>Adult Learning Principles</b> (ALP1, ALP 2) <ul style="list-style-type: none"> <li>• experiences that resemble real-world experiences, immediate connection that is relevant to their work</li> </ul>			

## **Appendix K**

### **Substitute Teacher Training**

#### **Agenda**

8:45 AM	Microsoft Teams Meeting Opens
9:00 – 9:30 AM	Welcome
	Introductions
	Rules of Engagement
9:30 – 10:00 AM	Principles of Human Behavior and the Professional Substitute
10:00 – 11:00 AM	eLearning Digital Tools
11:00 – 11:15 AM	BREAK
11:15 AM – 12:00 PM	Safety and Security
12:00 – 12:30 PM	Instructional Practices and Activities
12:30 – 1:00 PM	SmartFind Express
	Full-Time Teaching
	Final Reminders

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