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Expectations and Experiences
of Substitute Teachers

This article explores the expectations of support for and the experiences of substitute teachers in an urban school division in Saskatchewan. Data were collected in semistructured interviews with seven substitute teachers. The purpose of the study was to explore how substitute teachers frame their professional experiences and construct their roles in complex institutional contexts. The findings indicate that although participants view some of their work as highly positive, there are significant observable tensions in their professional lives. Work satisfactions and dissatisfactions of substitute teachers are discussed. Overall, results indicate a number of issues: substitute teachers are an integral part of the education system; professional teacher associations, although theoretically acknowledging the professional membership of substitute teachers, do not include them in professional activities; school divisions are ultimately responsible for the work of substitute teachers; and the future seems bleak for those who believe they have been condemned to the substitute list.

Cet article évoque les expériences d'enseignants suppléants et leurs attentes quant à l'appui dans un district scolaire urbain en Saskatchewan. La cueillette de données s'est effectuée par des entrevues semi-structurées auprès de sept enseignants suppléants. L'objectif de l'étude était de découvrir la façon dont les enseignants suppléants interprètent leurs expériences professionnelles et construisent leurs rôles au sein de contextes institutionnels complexes. Les résultats indiquent que même si les participants perçoivent de façon très positive certains éléments de leur travail, leur vie professionnelle comporte des tensions significatives. De façon générale, les enjeux suivants ressortent des résultat : les enseignants suppléants font partie intégrante du système éducatif; quoique les associations professionnelles d'enseignants reconnaissent, en théorie, l'affiliation professionnelle des enseignants suppléants, elles ne les intègrent pas dans les activités professionnelles; les divisions scolaires sont responsables en dernier ressort du travail des enseignants suppléants; l'avenir ne s'annonce pas très prometteur pour ceux qui croient avoir été relégués à la liste des enseignants suppléants.

Introduction

Substitute teachers fulfill a central role in maintaining the continuity of K-12 education. Although their work goes largely unnoticed, schools could not operate without their many contributions. The primary purpose of a substitute

teacher is to ensure that learning continues in the absence of the classroom teacher. Research shows, however, that this goal is not always possible because of the itinerant nature of the job as well as the challenges in dealing with a larger and increasingly diverse student population. Curtis (2002) found it "fairly self evident that supply teachers aren't as effective as permanent teachers. They need time to get used to a school's ethos…. And they don't last that long in one school" (para. 5). Nevertheless, the use of substitute teachers is widespread. At some point every school division needs teachers to take the place of classroom teachers. Varlas (2001) found that "students spend 5-10% of the school year under the instruction of a substitute teacher" (p. 1). Over the course of 12 or 13 school years, students spend a formidable amount of time with someone other than full-time classroom teachers.

Much of the early literature on substitute teachers (Baldwin, 1934; Jack, 1972; Vanderlinde, 1985) focused on the managerial and technical aspects of the role, but there was little information about substitute teachers and their work lives. To understand more fully the contributions that substitute teachers make to the education system, knowledge of the perceptions, expectations, and the role of substitute teachers is required. This study addresses this need and is guided by the following research questions: What expectations are held by substitute teachers about their position in the teaching profession, their role definitions, and role fulfillment? What types of professional support do substitute teachers need in order to perform their assigned duties?

Overview of Selected Literature

Few studies have documented the experiences of substitute teachers, and even fewer have explored the work in Canadian contexts. The literature on substitute teachers that dates back 40 years is still significant because many of the issues identified then still remain. In an early review of United States substitute teachers, Baldwin (1934) identified multiple criteria for the management of substitute teachers, concluding that substitute teachers were primarily viewed as commodities to be exploited by school boards. Most substitute teacher research from the 1940s, 1950s, and 1960s was largely concerned with the management of substitutes (Perkins, 1966).

Nelson (1972) reported that a major problem was "developing a well-qualified, highly skilled full-time substitute teacher who through experience and training becomes a well developed specialist at teaching at one school today, in another tomorrow, and in still another the day after tomorrow" (pp. 4-5). Educational administrators became increasingly concerned about the supply and quality of teachers after World War II, in part due to the expanding school-age population. Nelson also highlighted the problems substitute teachers encountered in dealing with school administrators who expected them to be more highly skilled in disciplining misbehaving students. Inghram (1976) surveyed 24 schools in five California school districts, finding that in some cases school personnel expectations of substitutes were greater than those of the regular teacher. Nevertheless, the principals who participated in Inghram's study said they backed substitute teachers when they provided technical instructional supports.

By the 1980s one can detect in the literature substitute teachers' concerns about their role. Vanderlinde (1985) reported that substitute teachers identified

several concerns (e.g., low status and poor treatment by students and staff, insufficient lesson plans left by teachers) leading to high levels of dissatisfaction. Given the transitory nature of the work and the lack of power that substitute teachers possess relative to full-time teachers, it is not surprising that their concerns have not been meaningfully addressed.

More recent literature shows that gender can be a useful lens in interpreting the work of substitute teachers. The British Columbia Teachers' Federation (2000) found that 79% of substitute teachers in BC were women, an increase of 4.8% since 1996. In 2000 female teachers on call (TOCs) had about 4.5 years of teaching experience compared with their male counterparts' 2.5 years. Women worked 61.9 days per year compared with the men's 63.8 days per year. As a result, they earned less per year. Male substitute teachers were more likely to look for longer-term or temporary contracts and full-time jobs than women. Galloway and Morrison (1994) and Damianos (1998) reported that substitute teaching was a way for women to balance family and work responsibilities. Damianos found that "sexist connotations … continue to perpetuate beliefs, even among substitute teachers themselves that this work is most suitable for women" (p. 111).

Abdal-Haqq's (1997) findings are consistent with those of Galloway and Morrison (1994), who reported that "rarely do students, teachers, or administrators regard substitutes as full professionals who meet accepted standards of practice. While often considering themselves to be effective instructors, substitutes frequently do not see themselves as professionals" (para. 1). Clifton and Rambaran (1987) found that teachers did not consider substitutes to be professionals. In lesson plan instructions, full-time teachers frequently instructed substitutes to assign "busy work" or to simply reteach material. Teachers and school-based administrators were seen as checking up on substitutes when they would not do the same to contract teachers.

Generally, substitute teachers require additional skills and knowledge. According to Jennings (2001), substitute teachers must possess resilience to thrive in unfamiliar classrooms. From this perspective, it is obvious that substitute teachers experience teaching differently than contract classroom teachers. Given that each school, classroom, and student is distinct, substitute teachers require a sophisticated teaching repertoire.

Dendwick (1993) identified four major difficulties associated with substitute teaching: "discipline and control within the classroom, inadequate or missing lesson plans, not knowing where things are and not knowing the staff" (p. 25). The role is further complicated because substitute teachers are often marginalized employees (Damianos, 1998). According to Clifton and Rambaran (1987), marginalized people are those who are not "integrated into the formal structure of an institution, and consequently cannot contribute meaningfully to the successful achievement of the desired goals of the institution" (p. 314). Lave and Wenger (1991) maintain that learning is socially situated, and learning about a job, or how to do a job, can take place only when there is social interaction among all involved parties. For substitute teachers this means that there must be regular access to other professionals. Because substitutes are in a classroom for such a short time, this is extremely difficult. Accordingly, they cannot become full participants in the life and work of the school.

Damianos (1998) found that substitute teachers were denied entry into most aspects of a school culture because they were not "involved in extra-curricular activities … in assemblies or presenting at assemblies, all the little things that make school life wonderful" (p. 104). Substitute teachers report feeling alienated when they cannot be part of students' lives. Ironically, for substitute teachers this is the one location "where they felt the greatest estrangement from their teaching colleagues and where their professional role was questioned and thus, simultaneously subverted" (as cited in Damianos, p. 106). Substitute teaching is a lonely job, in part because contract staff have little in common with substitute teachers and contact with others is rare. This is noteworthy because a significant percentage of contract teachers were themselves once substitutes.

To varying degrees the permanent teaching staff in a school defines the culture of the school. Fullan and Hargreaves (1996) define school culture as "guiding beliefs and expectations evident in the way a school operates, particularly in reference to how people relate (or fail to relate) to each other" (p. 37). Hargreaves (1995) found that the commitment of teachers, their identities and their teaching strategies, what he termed "teacher culture," are "defined through interaction with others who are significant for them," including their colleagues (p. 85). For regular staff members who are comfortable in the school culture, the culture supports accomplishment of tasks and provides structural support. But substitute teachers, who typically have little or no knowledge of the school culture, have a difficult time entering into the life and work of the school. Boyd (1992) found that school cultures could actually oppress groups or individuals new to the school or those who visited the school infrequently by denying them access to the inner workings of the school.

Methodology

Theoretical Perspective Informing the Study

Reality is socially constructed (Berger & Luckmann, 1967; Brown, Collins, & Duguid, 1989). Taking a social constructivist perspective means focusing not only on formal institutions themselves, but also on the processes by which individuals experience and make sense of their lives. This is precisely what is attempted in this study, particularly as participants inhabit a variety of classroom cultures. Recognizing that substitute teachers construct knowledge about teaching and learning is fundamental to understanding how they fulfill their duties in the school context. Individuals do not construct knowledge in isolation. Indeed, the social setting and the interactions within it influence how individuals construct knowledge about the world.

In presenting substitute teachers' narratives, we build on sociocultural theories of learning (Lave & Wenger, 1991; Wenger, 1998). From these sources comes the notion that learning occurs in communities of practice, and as individuals gain access to a community they become increasingly involved. According to Lave and Wenger, "the form that legitimacy of participation takes is a defining characteristic of ways of belonging, and is therefore not only a crucial condition for learning, but a constitutive element of its content" (p. 35). They suggest that entry into a community results from a process they call "legitimate peripheral participation" (p. 35). This means that an individual gains access to a community through growing involvement over a period of

time. Newcomers move from peripheral participation toward full participation. Concurrently, individuals are involved in constructing new identities for themselves. Lave and Wenger state that the key to legitimate peripheral participation is access by newcomers to the community. The period of legitimate peripheral participation in this case is unlimited given the nature of substitute teachers' work. "To become a full member of a community of practice requires access to a wide range of ongoing activity; old timers and other members of the community; and to information, resources, and opportunities for participation" (p. 101).

The congruency between Lave and Wenger's (1991) model and the substitute teacher narratives seemed suitable. As we immersed ourselves in the data, substitutes' experiences seemed to be accurately characterized by sociocultural notions of old timer and newcomer. Narrative inquiries evolve from a constructivist sociological and educational perspective that posits the notion that knowledge is created by learners in specific settings. This narrative approach is associated with a scholarly tradition acknowledging the centrality of reflection on professional practice (Clandinin & Connelly, 1995; Dewey, 1938; Schön, 1983).

Participants

After receiving ethics approval from the University of Regina, we accessed a public electronic newsletter list sponsored by a local substitute teacher group. We electronically mailed a letter of contact to 99 prospective participants. A total of seven substitute teachers agreed to participate in the study. Given the rare availability of prospective participants, a convenience sample was used. We accepted all volunteers (sex, teaching experience, or years and type of education were not considered in the selection process).

The seven substitute teachers who responded represented more than 60 years of combined teaching experience. Six women and one man were interviewed: two were in the 26 to 34 years age group, one in the 35 to 44 group, and four in the 45 to 54 group. The educational experiences of the group corresponded with the requirements of Saskatchewan Education: each possessed the minimum requirement of a Bachelor of Education degree. One had two bachelor's degrees, one was working on a master's degree, and one had completed a Master of Education degree. Participants earned their degrees between 1981 and 1998. Two were trained as elementary teachers, one in middle years, two in secondary, and two in K-12 arts education. Five participants considered themselves subject specialists in music, drama, dance, business education, social studies, French, and/or library science. Their preferences for teaching assignment—primary, elementary, middle years, or secondary—corresponded with their usual substitute teaching assignments. Five of the seven had worked as contract teachers for one to four years. One person had previously taught for 11 years in a private secondary school in Saskatchewan. All the interviewees had worked longer-term, temporary contracts in both elementary and secondary schools in Saskatchewan. All the participants were substitute teaching for only one urban school division and were not applying to any other divisions or schools. Pseudonyms are used for all participants.

Heather was between 35 and 44 years of age, married with adolescent children. She had the most teaching experience of the participants. She worked

full time for over four years before starting her family, but over the last eight years had worked sporadically. Although her partner was the main wage-earner, Heather actively sought a full-time teaching position with the school division in which she worked as a substitute teacher.

Gail was between 45 and 54 years of age, married with older children. Disappointed at the lack of full-time teaching positions, she was hired onto the substitute teacher list with a local school division. Gail preferred working with secondary-level students, but accepted elementary placements. Her partner was the prime wage-earner, and her goal was to secure a continuing part-time position in a secondary school.

Theresa was between 45 and 54 years of age and a member of a visible minority. She obtained teaching certification in 1993, but had been unable to secure a full-time position. Because her partner was the main wage-earner, Theresa was able to confine her job search to the education field.

Linda had just finished her third year of substitute teaching at the time of the interviews. She returned to university as a mature student and was engaged in graduate work in education. She was between 26 and 34 years of age, unmarried with no children.

Helen was a secondary trained teacher between the ages of 45 and 54, married with adolescent children. Unable to secure full-time teaching employment, she felt she had no other choice but to substitute teach. Her partner was the main wage-earner, but Helen would prefer a continuing part-time teaching position.

Sean was between 26 and 34 years of age, unmarried with no children. He has been substitute teaching for approximately four years. He was content to accept less substitute teaching work because it allowed him to pursue a music career in the performing arts. His long-term goal was to teach full time, but he was willing to wait for what he called the perfect job.

Jean was an experienced elementary and secondary teacher with approximately 14 years of full-time service. After being declared redundant by her school district a number of years ago, she had been unable to secure a continuing contract.

Data Analysis

The methodology consisted of in-depth, semistructured oral interviews. All interviews lasted from 60 to 90 minutes, and were audiotaped and transcribed. The interviews were conversational in nature and built around specific open-ended questions intended to encourage participants to reflect on their roles and expectations as substitute teachers. Questions such as the following served as starting points; other questions arose in response to particular comments, and at times the researcher asked for clarification or expansion.

- As a substitute teacher, what do you believe your role to be?
- Do you think substitute teachers need professional development activities?
- Describe a typical day in your life as a substitute teacher.
- Describe some common problems you have in the classroom or at the school. How might you handle these problems?
- What kinds of professional development activities have you undertaken in the last three years?
- What do you like/dislike about being a substitute teacher?

• What are your views on the call out system?

In analyzing the transcripts, we began by reading them several times to identify issues and concepts related to participants' work as substitute teachers. For each theme we developed phrases or codes that seemed to capture the essence of what they were telling us. We placed a list of these codes beside columns for each participant, and going through the transcripts again, we noted the pages on which reference was made of each topic. During this process it became obvious that some themes should be deleted, combined, modified, and others added. With the codes and frequencies we formed a tentative structure of key themes and subthemes. We then began writing the report, going back to the transcripts to elaborate the themes and gather representative quotations. As the writing process continued, we had to adjust further some themes and modify quotations to represent more accurately the content of the transcripts. At the end of the process we returned to the transcripts, reading them in their entirety to satisfy ourselves that we had in fact presented the information fairly and accurately. The transcripts had previously been returned to the participants as a member check to ensure that their words and our interpretations represented their thinking.

The methodology employed in this interpretive study was qualitative as defined by Punch (1994). We had a small sample of participants, the interviews were open-ended, we made extensive use of examples and quotations in reporting, and our understanding was modified as the analysis proceeded. Also, the coding of responses was partly a matter of judgment, and the meaning attached to each code or theme depended on our interpretations of substitutes' comments.

Results

The issues raised by the teachers who participated in this study have been raised before. Although our findings are not unique, they are important because they highlight the ongoing challenges associated with integrating substitute teachers into K-12 schools. Many of the perceptions and experiences reported here will resonate with readers, thus providing deeper understandings of substitute teachers' work in complex educational settings.

Satisfactions Associated with Substitute Teaching
The experiences of the substitute teachers in this study are consistent with what Anderson and Gardner (1995), Abdal-Haqq (1997), and Damianos (1998) found, namely, that substitute teachers appreciate the flexibility of substitute teaching. With an eye toward full-time employment, all the participants networked with contract teachers and school-based administrators, thereby gaining experience in K-12 classrooms. As substitute teachers they acknowledged that they spent little time planning lessons, and no time in extracurricular activities. Sean, content to work less in order to pursue nonteaching employment opportunities, said, "It's nice to leave at 3:30 p.m. and not to have to take the baggage of the job home with you. I don't have to think about whatever particular students or whatever problems of the day or whatever happened."

Participants acknowledged the challenges associated with getting enough work, thus making it difficult to establish professional relationships with full-

time teachers, administrators, and human resource personnel. For Helen, an experienced substitute teacher,

> The first few times that somebody substitutes can be extremely trying and you're often sent to difficult classrooms.… You'll learn tricks: you'll learn what works for you. Even regular teachers have days where they feel like the lesson's a complete bomb.

She went on to highlight the potential long-term benefits of the work:

> I think that it can be a very positive job and if you're using it as a stepping stone it's a wonderful, wonderful experience because you're exposed to so many situations and to different types of students and it's just a matter of using your experience and being patient, and knowing that it'll get better with time.

These teachers reported that they tolerated the stresses and uncertainty associated with substitute teaching because they enjoyed working with the children and adolescents. Although there may be few satisfactions, all participants were convinced that the only way to achieve their employment goals was to "put in the time" and impress prospective employers, a strategy congruent with Lave and Wenger's (1991) notion of legitimate peripheral participation.

Frustrations Associated with Substitute Teaching

Although there are positive aspects to substitute teaching, the negatives far outweigh the positives. For example, substitute teachers tend to be isolated from their peers. Heather pointed out, "You're not part of a group, really. Although we have our substitute teacher meetings, it's not the same thing. You're excluded from any conferences or workshops or if there's room they'll let you come." Not only are substitute teachers kept on the margins in schools, they also encountered barriers in building communities of support among other substitute teachers. Participants noted that they never felt part of a staff because they were in the school for a such a short time. According to Lave and Wenger (1991), individuals need to participate in a broad range of activities over time in order to gain full access to a community, something that is clearly difficult in the case of substitute teachers. Fullan and Hargreaves (1996) pointed out that school cultures operate in ways that promote and exclude individuals in how they relate to one another. As outsiders, these substitute teachers were marginalized and isolated in the school, which translated into their being denied access to vital knowledge of the school culture. People who are marginalized have a difficult time participating in the social learning necessary to the development of a teacher (Bodin & Clarke, 2002; Damianos 1998; Dendwick, 1993; Lave & Wenger, 1991).

These substitute teachers' feelings of isolation and insecurity were fueled by their belief that nepotism and favoritism existed in school divisions. They assumed that the substitute clerk doled out assignments from a prioritized list. Participants were dismayed to discover that it did not work that way. Jean noted,

> I'm trapped from 7 o'clock in the morning till 8 in the morning. And every morning I don't know what I am doing, and even when a principal has phoned and confirmed it, you're coming in, I still have to wait for that call from [the clerk] to kind of authorize the whole thing or legalize the whole thing.

Linda likened the wait for the morning phone call like waiting for the call for a first date:

> I don't like the fact that if you sit around and wait and no phone call comes, and you make plans for the day or you have an appointment or something and they call you and you can't make it, I don't like that they very often stroke you off and punish you for a number of days or a number of times depending on how many times you've had to cancel for them … you can't always be putting your life on hold for them.

According to these participants, refusing work comes at a cost. Most participants said that when they started substituting, they took any job offered because they thought there would be retribution for refusing work.

Overall, most of these substitutes indicated that there were significant problems associated with the lack of transparency in the hiring process. The notion of "once a substitute, always a substitute" was prevalent. The consensus view was that "good substitute teachers" tend not to be offered contract work because they are too valuable as substitute teachers. The folklore among participants was that school divisions kept older, more experienced, and therefore more expensive teachers out of full-time appointments.

Several participants commented about nepotism associated with hiring practices. For example, Gail acknowledged that because she does not socialize with school principals and "influential" teachers, there is little chance that she will be offered a contract. According to her, it is definitely a case of *it's not what you know, it's whom you know.* Theresa reported that out of her graduating class, the new teachers who were offered contracts were either children of teachers or principals or were hired to coach sports teams. Helen noted that being on the substitute list for longer than a couple of years was "the kiss of death.… You might as well forget about getting into the classroom." Jean remembers being told by an administrator that "there were far too many fresher, younger faces coming out of university, and there wouldn't be a classroom for me." Even the least experienced substitute teachers like Theresa and Sean realized that there was limited time to move from the ranks of part-time substitute teaching to full-time contract work. In summary, a major concern of these substitute teachers was getting and keeping work. Their comments revealed a continual cycle of hope and disappointment. Those who were actively seeking work were hoping for longer-term or temporary contracts.

Substitute teachers were also frustrated with the lack of professional development opportunities available to them. According to Theresa, Heather, and Gail, it was next to impossible to participate in professional development because they were wait-listed after contract teachers. Making matters worse, most events take place during the day when the substitute teacher may be working for those same teachers who are taking part in professional development. This is another example of substitute teachers being unable to gain standing in existing communities.

Galloway and Morrison (1994) and Esteve (2000) found that personal qualities such as reliability, flexibility, creativity, and commitment enhanced the chance of success for substitute teachers. But even the most dedicated teacher cannot succeed in the classroom without sufficient information about the school, students, and classroom processes. For example, some elementary

schools provided information packages of teachers' plans, class lists, student behavior expectations, as well as general information about the school. However, according to these substitute teachers, this procedure was not the norm. The lack of information about school rules and guidelines was frustrating to these substitute teachers because they reported having little understanding of the school cultures in which they were working. According to Jean, "I need to know the context in order to make decisions about student behavior." Vanderlinde (1985) and Anderson and Gardner (1995) found that lack of knowledge about the school, staff, and students was a significant disadvantage when judging the efficacy of substitute teachers.

Classroom management tends to be a major issue for most classroom teachers, but for substitute teachers classroom management was an area that either increased or reduced their performance from a school administrator's perspective. Temporary or substitute teachers are often noticed for their ability to keep order in the classroom. Our participants were unanimous that, "a noisy classroom is usually equated with an out-of-control classroom." Theresa and others talked about the potential negative effect to their reputations in the school if they could not maintain order. She remembers thinking, "making a bad impression may reduce the amount of work I get in the future." Sean appeared less concerned than the others, but acknowledged that, "teachers talk to other teachers; how good a job I do in one place could positively or negatively impact future opportunities."

Heather said that she often felt like "fresh meat.… always being tested by students, even in the better schools." Substitute teachers somewhat accepted that students tended to behave differently with a substitute. Because of this, participants admitted having to adjust their preferred teaching style and expectations for student behavior. Helen reported having to act "like a prison guard" in order to maintain control. Theresa and others complained that there seemed to be few consequences for students who misbehaved, "the bolder they get the more power they have."

Discussion

Publicly funded schools are hierarchical institutions with many levels or divisions of power. Few members of the teaching profession have less power or authority than substitute teachers. Much can be learned by linking substitute teachers' experiences in hierarchical school systems to Lave and Wenger's (1991) notions of legitimate peripheral participation and communities of practice. Becoming full members of the school communities was problematic for these substitute teachers. They developed limited professional relationships with classroom teachers because those teachers were not typically present in schools when substitutes carried out their duties. Substitute teachers did not develop secure identities as teachers, in part because of the uneven support of school personnel and also possibly because of the lack of personal and focused help. They wanted entry into K-12 school communities, yet they knew that involvement was short term and sporadic given the nature of the substitute teacher's role. Although it might be in their best interest to try to gain entry, it might not be possible given their limited time in schools. Although substitute teachers are responsible for many of the daily aspects of classroom instruction,

they remain on the periphery, never gaining full entry into mainstream school cultures.

Substitute teaching was an isolating experience, in part because full-time teachers kept to themselves and blocked others' attempts to become part of their group. Ironically, substitute teachers stayed away from situations in which they felt isolated, thus isolating themselves even more by remaining in their classrooms before and after school and during breaks. They exhibited qualities they criticized in others, becoming isolated and isolating. Substitute teachers by their own admission left as soon as possible at the end of the school day and rarely participated in school activities. There was little chance for teachers or school-based administrators to get to know them as people or to understand their strengths and abilities as teachers.

Final Thoughts

Our goal as researchers was not to draw conclusions from the data, but rather to present a clearer picture of the lives of these substitute teachers. This study was a good example of Lave and Wenger's (1991) theory of learning as a social practice. Although these substitute teachers demonstrated commitment to professional practice, they became used to functioning on the periphery of school communities. It seems unlikely that they will ever gain the status of old-timer as defined by Lave and Wenger.

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