RESEARCH BRIEF

Summary of Findings: EVALUATION OF SUB360 SUBSTITUTE POOL PROGRAM – PHASE I

Noelle Banuelos, Ph.D.   March 2021

In 2020, Child360 piloted a Substitute Teacher Pool Program ("Sub360") to address the following problem and opportunity: ECE sites are in need of reliable, trained, and personable substitute teachers, while current agencies are not adequately filling this need; however, Child360 has the workforce relationships to recruit prospective substitutes, the staff to train substitutes, and connections with prospective clients in need of substitutes. This pilot program was composed of one small cohort of substitute teachers and a single client, a school district in Los Angeles County. A developmental evaluation conducted alongside the pilot's implementation provided Sub360 managers with opportunities for continuous feedback, discussion, and reflection in real time. This research brief presents the key findings from the evaluation, along with recommendations to move the Sub360 program forward successfully.

Key Findings
- Early challenges to the program were due to initial misunderstanding of clients' expectations and requirements.
- The recruitment effort for new substitutes was implemented with successful strategies and adaptability, despite pandemic-related limitations to in-person communication and outreach.
- Sub360 developed a comprehensive training program that met the needs of the substitutes as well as those of the client. The client was very satisfied with the training that Sub360 provided to the substitutes prior to their assignments.
- Expectations that were met, good communication, and availability of assignments were among the positive experiences shared by substitutes. Concerns over COVID-19 were present but did not hamper the substitutes' performance.
- Overall, the client was satisfied with the quality and performance of the substitutes and Sub360's management of the program. The Sub360 program and substitutes met client expectations.

The Sub360 pilot program achieved many successes in outreach, recruitment, onboarding, and scheduling during its first phase, and demonstrated great potential for its continued development, refinement, and implementation. The program also experienced some challenges and the learning curve that typically accompanies a program getting off the ground. The substitutes shared positive experiences and were satisfied with Sub360's support. Quality training, communication, and responsiveness were the primary reasons motivating the client to report that they would use Sub360 services again, and would recommend Sub360 to colleagues and other school districts.

Key Recommendations
- Ensure that client expectations, needs, and requirements for substitutes are clearly articulated and documented during the client contract phase.
- Provide ongoing opportunities for peer communication and collaboration within and among substitute cohort groups.
- Provide substitutes with relevant resources and information about clients, sites, and programs. Create a handbook for substitutes, to include Sub360 information, protocols, and classroom strategies.
- Develop processes for monitoring and evaluating substitute quality and Sub360 program performance that include opportunities for ongoing communication and feedback.

Overview

In 2020, Child360 endeavored to build a pool of qualified substitute ECE teachers as a service that would benefit the organization and promote uninterrupted quality instruction for providers who were in need of such services. A pilot of the Substitute Teacher Pool Program ("Sub360") was formed to address the following problem and opportunity: ECE sites are in need of reliable, trained, and personable substitute teachers, while current agencies are not adequately filling this need; however, Child360 has the workforce relationships to recruit prospective substitutes, the staff to train substitutes, and connections with prospective clients in need of substitutes.

The pilot program was framed by several key objectives: to create a pool of high-quality substitutes meeting provider needs, to address the issues providers have had with other substitute agencies, and to foster a committed ECE substitute workforce through opportunities for career advisement and advancement. The project charter also set forth objectives related to planning for recruitment, hiring, onboarding, contracting, and determining whether the substitute pool might be a viable and sustainable revenue stream for Child360.

A pilot program composed of one small cohort of substitute teachers and a single client, a school district in Los Angeles County, was designed and implemented as Phase I of this effort. Five milestones were proposed for this phase: (1) recruit, hire, and onboard a small cohort of substitutes, (2) develop trainings and implement them with hired substitutes, (3) deploy substitutes to the school sites, (4) monitor quality to ensure high levels of provider satisfaction, and (5) evaluate substitutes' progress and assess providers' experience. Phase II of the pilot would include new clients, more cohorts of substitutes, refined processes, stronger infrastructure, and evidence of effectiveness as determined through achievement of program outcomes. Financial considerations and scalability would also be more closely reviewed in the second phase.

The design of the Sub360 evaluation in its first phase was largely developmental, which supported its development and implementation through ongoing data collection, rapid feedback, and sense-making discussions to inform and guide decision-making processes (Patton, 2011). The general approach was descriptive, incorporating qualitative methods such as document reviews, interviews, and surveys as the primary data collection tools and sources.

Early challenges to the program were due to initial misunderstanding of clients' expectations and requirements.

Communication between the client and Sub360 program managers at the start of the pilot consisted of sharing expectations and requirements, and discussing how to best meet the needs of both programs. These communications were vital to the initial steps of the program, including recruitment and coordination of assignments. However, there were two areas in which limitations in understanding and clarity presented challenges to the program in the first phase. The first concerned limited knowledge of the client's hiring and payroll practices, and the effect of these practices on the anticipated outcome of having the cohort hired as permanent teachers after the pilot program ended. Sub360 was unaware that this district did not hire permanent teachers directly; rather, they hired internal substitutes who would become permanent teachers as positions became available. Their internal substitutes would be paid at the same rate, regardless of experience. At Sub360, Cohort 1 substitutes were informed during their onboarding that they would be offered permanent teacher contracts from the client. This miscommunication resulted in confusion and subsequent complications at the end of the 90-day assignment period.

A second area of misunderstanding concerned the expected types of substitute assignments. In addition to the preschool classrooms, the client ran a before- and after-school program for children in grades K-5. Due to COVID-related school closures, the client had several classrooms open all day for these students. It was the client's expectation that the Sub360 substitutes would work in all classrooms, during all times of the day, and therefore requested substitutes for school-aged classrooms as well as preschool classrooms. This came as a surprise to the substitutes from the start, as they tried their best to work with this unfamiliar age group with little support. Sub360 did not become aware that these classrooms were regularly assigned to the substitutes until well into Phase I. Nevertheless, the substitutes were able to meet this challenge through their own professionalism, use of resources, and standards of quality. Substitutes sought out resources for working with school-age children, including class management strategies and age-appropriate activities.

The Sub360 team implemented successful strategies for recruiting and hiring substitutes, effectively adapting to the pandemic-related limitations to in-person outreach and communication.

The two most successful recruitment strategies during this first phase, according to the Sub360 team, were direct outreach to participants of workforce and stipend programs, and postings on Indeed.com, an employment website. The recruitment staff believed that their ability to effectively recruit and hire the required number of qualified substitutes for this first client was a notable success, particularly given that they had to convert recruitment to a virtual platform so swiftly and did not have use of an applicant tracking system.

Sub360's hiring process for this first cohort of substitutes was well-planned and successfully implemented. Once potential candidates completed the supplemental Sub360 application, the process began with an HR review of the submitted application and documentation. Child360's Workforce Development staff verified the applicants' transcripts. Once applicants were approved, a phone screening process was initiated followed by a virtual panel interview. The program staff compiled a list of interview questions to standardize the process. Interviews with open-ended questions allowed candidates to describe, in their own words, their teaching experience and possible solutions to classroom scenarios (Smith, 2005). After the applicants successfully completed the interviews, Child360's Human Resources Department performed required background checks on the candidates and then made offers of employment.

Sub360 developed a comprehensive training program that met the needs of the substitutes as well as those of the client. The client was very satisfied with the training that Sub360 provided to the substitutes prior to their assignments.

The onboarding process and training component of the Sub360 program played a key role in preparing substitute teachers for entering the classroom as well as meeting the needs of the children and client. Training topics were generated by Child360 experts, and from feedback gathered from focus groups of program coaches and lead teachers. Topics were considered in order of importance, and included developing appropriate practices and reviewing strategies for social-emotional learning. Health, safety, food handling, and teacher-child interactions were also considered important for inclusion. The staff included other training topics during the onboarding for Phase I specifically requested by the client, such as procedural/operational topics (e.g., using Time Simplicity) and COVID-19 Safety Training, because their site staff were also trained on these topics.

The substitutes learned much about the Child360 organization and the Sub360 program. They were very satisfied with the onboarding and training process, as evidenced by post-survey results. For example, on a 5-point scale with 5 being the most helpful, the average rating for how helpful the substitutes believed the training would be to their classroom teaching experiences was 4.6. On a 10-point scale with 10 being the most likely to recommend joining Child360 as a substitute teacher to their colleagues, the average rating was 8.8. Reasons for their ratings included "great opportunity to experience different classrooms," "they prepare us to enter the classroom," and feeling "supported and informed" by the Child360 team.

The client's program coordinators all spoke very positively about the training and preparedness of the substitutes, highlighting this feature as a contributing factor to the success of the pilot. As one coordinator shared during an interview, "You need substitutes that are trained and prepared and this is what you get from Child360. The excellent training they receive before they start and are ready to walk into classrooms." While the client offered mandatory training to their internal substitutes, they were reportedly unable to provide the additional variety of relevant and in-depth training that Sub360 provided. One coordinator liked the "hand-holding" that Sub360 was able to provide to their substitutes, which prepared them for the classroom in ways that other substitutes, both the client's own and others they have worked with, were not prepared. Another coordinator spoke of how well-equipped the substitutes were, and how they arrived knowing how to "handle difficult situations tactfully." The substitutes were described as coming in "at a higher level, above average."

Expectations that were met, good communication, and availability of assignments were among the positive experiences shared by substitutes. Concerns over COVID-19 were present but did not hamper the substitutes' performance.

Midway through the pilot, substitutes reported that Sub360 had met their expectations in their positions as substitute teachers through good communication, availability of assignments, and the ability to teach while being flexible in their schedules. The substitutes also shared other positive experiences, such as the time spent and engagement experienced with the children and staff. The friendliness and helpfulness of the client's staff were also seen as positives. Some substitutes reported that expectations had not been met due to assignments in school-aged classrooms and early scheduling issues. Overall, based on a 10-point scale rating how likely substitutes would be to recommend joining Sub360 to their colleagues, with 10 as the most likely, the average rating was 8.2 at the midway point of the substitutes' time with the client. Substitutes reiterated these positive experiences during their final interviews. Sub360 staff were described as very responsive when the substitutes had questions, and communication

was ongoing. It was noted by one substitute that while communication with the supervisors was good, she wished there had been more communication with the other cohort members as a group. Another substitute added that the flexibility of the program allowed her to continue going to school and work when she was available.

All of the substitutes shared early concerns and hesitation about going into work, being around children, and the potential COVID-19 exposure. One substitute described feeling like she "had to get used to the new normal." Another substitute shared that when she saw all of the practices the client had in place at the sites to protect the children and teachers, she felt better. Some of the substitutes spoke positively about training they received on COVID-19 safety from Sub360, and the training that the children had received on hand-washing and social distancing protocols. Other substitutes explained that time was sometimes spent on keeping children distanced while still trying to connect with them. One shared that sometimes children hugged her, but she washed her hands afterward. She did not want to "change it to an environment where children felt they could not even approach me." They all agreed that, with time, they became more comfortable in their environments and were able to fulfill their responsibilities.

Overall, the client was satisfied with the quality and performance of the substitutes and Sub360's management of the program. The Sub360 program and substitutes met client expectations.

As the pilot was underway, client program coordinators all shared that the Sub360 program was meeting "all" or "most" of their expectations in providing quality substitutes for their ECE program. Some of the ways their expectations were met included the substitutes' willingness to work any shift, their "picking up" of shifts in a timely manner, and how they arrived "equipped to perform their duties." One program coordinator specifically noted that the communication was good with the substitutes and program. None of the respondents gave examples of expectations that were not met by the program. When asked about what attributes or behaviors stood out for them about the Sub360 substitutes, two coordinators noted that the substitutes had a better understanding of what was expected of them, and that coordinating teachers had provided positive feedback about the substitutes' assignments. The third coordinator noted that the ability to get substitutes when needed was a positive attribute of the program in general.

Client satisfaction continued through the end of the assignment period. Coordinators described the experience as very positive, using such descriptors as "amazing," "organized," "well-equipped," and "responsive" in reference to the program and substitutes. The client's representatives were in overall agreement that they hoped to continue their relationship with Sub360 in the future.

Recommendations

Ensure that client expectations, needs, and requirements for substitutes are clearly articulated and documented during the client contract phase. The Sub360 program would greatly benefit from developing a systematic and standardized process for gathering and recording this information, as in a checklist or standard form, to ensure that the information is as thorough and consistently collected as possible. Having this information clearly understood by all parties is vital to the success of the program's implementation and effectiveness. In addition to regulatory requirements and licensing for substitutes, other essential areas of information include hiring practices, pay and benefit structure, and client/organizational structure. This is especially necessary given the number and variety of Child360 staff (e.g., Regional Account Managers, Client Services) who may be involved in client outreach and contract negotiations. A standardized process would allow the Sub360 program manager to have access to all of the relevant information needed for recruitment and onboarding.

Provide ongoing opportunities for peer communication and collaboration within and among substitute cohort groups. Peer support was cited by program coaches and teachers as a need among substitutes, helping to mitigate any feelings of loneliness or isolation in the field and to promote greater confidence (Nazaryan, 2020). A community environment for substitutes can provide a venue to engage, collaborate, and support one another. Support from colleagues is positively related to feelings of well-being in the workplace among substitutes in ECE environments (Kao & Chang, 2017). During the social distancing requirements of the COVID-19 pandemic, use of message boards, text chats, and Microsoft Teams may be viable options.

Provide substitutes with relevant resources and information about clients, sites, and programs. Create handbooks for substitutes, to include Sub360 information, protocols, and classroom strategies. Substitutes should be provided with as much logistical and program information as possible pertaining to each client. This may include, but is not limited to, parking information, class times and schedules, emergency information, floor plans or site maps, and directories or contact information for key personnel (Purvis & Garvey, 1993). Emergency and logistical resources are particularly important, as critical situations may occur without notice and it is crucial that the substitute be informed and prepared to ensure the safety of the students (Bowers, 2009). Further, relevant information on the children and families served may allow the substitutes to be better prepared, for example, in working with school-age children, multicultural classrooms, or children with special needs (Smith, 2005). This information would also provide Sub360 with the opportunity to add additional training and support in these areas during the onboarding process.

Handbooks for substitute teachers provided during training have been positively associated with effective preparation and performance at school sites (Rosborough, Sherbine, & Miller, 1993; Tomlinson, 1997). Potential information may include resources and key topics from trainings, protocols to follow during various situations, Child360 support resources, and best practices. Program coaches and teachers in focus groups also discussed the benefits of having access to classroom strategies and activities to promote teacher preparedness, particularly in the absence of lesson plans or instructions left by classroom teachers (Nazaryan, 2020).

Develop processes for monitoring and evaluating substitute quality and Sub360 program performance that include opportunities for ongoing communication and feedback. A process for the ongoing evaluation of substitute performance would be invaluable to the continuous improvement of the program. Substitute programs should build in opportunities for program managers, administrators, teachers, and substitutes to give input regarding the strengths of the program, areas for improvement, and recommendations (Rosborough, Sherbine, & Miller, 1993). Developing evaluation guidelines and instruments, such as a form or rubric, would be useful in this effort (Purvis & Garvey, 1993).

Previous research has also shown that substitutes typically received little to no feedback on their performance, which could provide valuable information for improvement and be a source of motivation (Minthorn, 2000). Opportunities for the substitute to communicate with the classroom teacher and/or administrators about the day's activities might also contribute to quality performance (Wheeler-Ayres, 2005). This previous research was substantiated by Child360 program coaches and teachers from the client organization in focus groups, who shared that a line of communication and feedback between classroom teachers and substitutes might result in substitutes being better prepared for their assignments (Nazaryan, 2020).

References

Bowers, T. (2009). *From survive to thrive: What great substitute teachers do differently.* Worthington City
Schools: Ohio. Retrieved from
https://www.worthington.k12.oh.us/cms/lib02/oh01001900/centricity/domain/57/hr_ebook.pdf

Kao, C. & Chang, W. (2017). The relationship between job stress risk factors and workplace well-being with the moderating effects
of job burnout: A study of substitute educators in early childhood education in Taiwan. *European Journal of
Multidisciplinary Studies, 2*(5), 392-401.

Minthorn, R. (2000). How one district implemented a substitute teacher training program. *SubJournal, 1*(1), 27-39.

Nazaryan, S. (2020). *Sub360 Focus Group Report*. Internal Child360 report: unpublished.

Patton, M. Q. (2011). *Developmental evaluation: Applying complexity concepts to enhance innovation and use*. New York, NY:
Guilford Press.

Purvis, J. R., & Garvey, R. C. (1993). Components of an effective substitute teacher program. *The Clearing House: A Journal of
Educational Strategies, Issues, and Ideas, 66*(6), 370-373. DOI: 10.1080/00098655.1993.11478606

Rosborough, M., Sherbine, D., & Miller, D. (1993). Recruiting, selecting, and training substitute teachers. *NASSP Bulletin, 77*(550),
104-106.

Smith, G. G. (2005). Screening teachers and substitute teachers: Best methods for use in prescreening applicants to predict post-
employment success. *SubJournal: For Personnel Responsible for Substitute Teaching, 6*(1), 17-27.

Wheeler-Ayres, S. (2005). A substitute teacher preservice staff development program: A case study of the Los Angeles County
Office of Education. *SubJournal: For Personnel Responsible for Substitute Teaching, 6*(1), 48-60.

For more information about this evaluation, please contact researchmail@child360.org.

Appendix

Evaluation Questions

The evaluators generated a series of questions to provide an evaluation roadmap for studying the development, management, implementation, and subsequent outcomes of the Sub360 pilot. Table 1 presents the questions that guided the evaluation for Phase I, categorized by topic area and in the approximate chronological order of the program's timeline for implementation. Any additional or revised questions addressed in the evaluation of Phase II will appear in a subsequent report.

Topic Area	Evaluation Questions
Program Management and Development	• What were the successes and challenges faced by the project managers in developing and managing this program during the first phase?
Substitute Teacher Recruitment	• What was the process for recruiting teachers for the first phase? Who was involved? • What were the successes and challenges experienced during recruitment? • What were lessons learned for subsequent rounds of recruitment?
Hiring Process	• What were the qualifications/criteria for hiring? Who was involved in hiring? • What were successes and challenges experienced during the hiring process? • What were lessons learned for subsequent rounds of hiring?
Onboarding	• What was incorporated into the onboarding process and what trainings were included? • What were the substitutes' experiences of the onboarding process?
Scheduling and Coordination	• What was the process by which substitutes were scheduled? • What were successes and challenges experienced with scheduling and coordination? • What was the process by which substitutes were paid?
Supervision	• How were the Sub360 supervisors onboarded/oriented to their new role? • How satisfied were substitutes with their Sub360 supervisors? • How was substitute performance quality monitored and ensured, by Sub360 and client supervisors?
Substitute Teacher Outcomes (Experiences, Knowledge, Retention)	• What was the experience of the new substitutes in Phase 1? • What was the rate of retention at the end of Phase 1? • Based on this information, how might retention/experiences be improved? • Did the substitutes' knowledge of quality teacher-student interaction change over their time spent with onboarding and client assignments?
Client Outcomes (Experience, Satisfaction, Recommendations)	• What were areas of success and concern from the client at the end of Phase I? • How satisfied were clients at the end of Phase I? • What recommendations would the client make to potential and/or future clients?

Table 1. Topic Areas and Evaluation Questions for Phase I.

Evaluation Methods

Data collection methods for the first phase of the evaluation included document review, ongoing interviews and sense-making discussions with Sub360 program managers and staff, surveys, and interviews with substitutes and district program coordinators. Brief online surveys were sent out to Cohort 1 substitutes and key district staff midway through the 90-day pilot period. Brief interviews, by phone and/or video chat, were conducted at the end of the pilot period. The purpose of the surveys was to gain insight into any preliminary areas of success or challenge that might inform the Sub360 program staff as they developed the program, or assist them in preparing for future cohorts and providing necessary support to the client in a timely fashion. The interviews, while also serving a developmental function, were designed to yield outcome data on substitute and client experiences and satisfaction. Substitutes also completed post-onboarding questionnaires and pre- and post-surveys measuring knowledge of quality teacher-child interactions.