The Successful Substitute Teacher
Sheila J. McHugh
Sheila McHugh has been an educator since 1966. After graduating with a B.A. from the University of Western Ontario, she moved to Calgary, Alberta, where she obtained an education degree and began teaching high school English and physical education. In 1976 she took time off from full-time teaching to raise a family and obtain a degree in teacher librarianship. It was during this period that she began substitute teaching and found it to be a rewarding experience.

After several years of part-time teaching contracts interspersed with numerous substitute teaching days, she became interested in the educators' perceptions of the substitute teacher as a professional equal. In 1997 she obtained her master's degree from the University of Lethbridge, where she researched the professional status of substitute teachers in southern Alberta. She has lectured, conducted workshops, and written extensively about this subject.

In 1999 McHugh took a leave of absence from her school district to move to Japan, where she and her husband currently are teaching English.

Series Editor, Donovan R. Walling
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by
Sheila J. McHugh

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Introduction

At any time during the school year, the words, "We've got a sub!" may echo through the school corridors as students arrive for their classes. The "sub," of course, is a substitute teacher, who is one of thousands of a corps making up the roster of replacements for regular classroom teachers who must be away for some reason, whether attending a staff development seminar or simply home with the flu.

The *Oxford English Dictionary* says a substitute is "one exercising deputed authority." It is this definition that gives credibility to the substitute teacher. The individual who is replacing the regular classroom teacher holds in large measure the same responsibility and authority as the regular teacher. But who are these replacements? And how are they perceived by the students, the teachers, the principal, and other staff with whom they will be interacting on any given day?

Being engaged as a substitute teacher should entitle this individual to the same respect given the regular teacher by the principal, other teachers and staff, and students. But most substitute teachers will attest that such is seldom the case. Without that level of respect,
the substitute teacher's authority and effectiveness are similarly reduced.

Barry McWilliams' cartoon offers a glimpse into how substitute teachers are regarded. The key questions are these: Why are substitute teachers depicted this way? and What can educators do to enhance the perception of substitute teachers and thus create for them a positive, successful, and professional image? The purpose of this fastback is to explore how these questions might be answered.

*Cartoon by Barry W. McWilliams, courtesy of Barry's Cartoons, Luther, Montana.*
A Short History of Subbing Issues

A short examination of substitute teaching issues and how they have changed in the past 20 years should help educators (including subs themselves) better understand the current situation. Early in the 1980s education publications and discussions focused on principal and teacher concerns with the teaching quality and classroom management practices of substitute teachers. Most publications aimed at substitute teachers dealt with management tips along the lines of “how to survive the school day.”

Later publications and discussions began to assess problems of substitute teaching, such as lack of authority in the classroom and the school, lack of knowledge of the curriculum, classroom management difficulties, and low pay. At the same time, substitute teachers themselves began to voice their own concerns about lack of professional regard, feelings of isolation from school staff and students, low pay, and lack of professional development opportunities, specifically related to curriculum and classroom management.
In the 1990s suggestions came forward for improving the status of substitute teachers. Among the recommendations were: substitute teacher orientations at the district and school levels; substitute teacher handbooks at the district, school, and classroom levels; professional development for principals and teachers to acquaint them with the issues surrounding substitute teaching; and for substitute teachers, professional development on the matters of curriculum change and classroom management. Pay increases and professional recognition also were recommended.

As substitute teaching concerns have risen on the education agenda, subs also have formed substitute teacher groups to facilitate dialogue with principals, teachers, and school districts. These groups also have strengthened substitute teachers' representation in bargaining for better pay and professional development. Workshops and substitute teacher conferences have begun to get substitutes involved with their professional role.

Schools now are poised to capitalize on these advances. How they can do so is described in the remaining pages of this fastback. What can educators do to ensure that the substitute teacher is seen as a professional equal in the school and the classroom? How can teachers help substitutes to provide quality teaching and a positive and pleasant learning experience for students? What are the responsibilities of school districts, principals, teachers, and substitute teachers toward the betterment of substitute teaching? Finally, how should substitute teachers tackle their professional responsibilities if they are to gain that authority and respect?
What Schools Can Do

Responses to issues that revolve around substitute teaching must be addressed at several levels. Following are suggestions for school districts, principals, and teachers.

District Responses

Adopt fair hiring practices for substitute teachers.

Substitute teachers often feel that they are treated unfairly when it comes to hiring them for full-time teaching positions. Many substitutes are high on the salary schedule, and budgets may be strained to pay them for years of training and service. Nonetheless, school districts should strive to give substitute teachers who want to become full-time employees priority wherever they can. The typical sub brings a wealth of experience to a school's instructional team.

Allow for the regular placement of a substitute teacher in the same school over the school year.

Although teachers may call a particular substitute teacher every time they are away from the classroom, a school district should think about hiring the same substitutes for any given school during the school year. The
students will get to know and better accept the substitute teacher. The substitute teacher will come to know the school's policies and procedures, as well as the classrooms in which they teach. Being based in a particular school may allow the substitute to feel more a part of the school team and to gain the respect and acceptance of the students and staff.

Provide orientations at the district level for substitute teachers.

Subs need to know the chain of authority in a school district. They should be aware of the district's policies, practices, and philosophy, especially its thinking on substitute teaching. An orientation, including a tour of the district office and the presentation of a substitute teacher handbook, is recommended.

Facilitate evaluation if substitute teachers request it.

If teacher evaluation is the responsibility of the school district, let substitutes know that they can obtain evaluations on request. Better still, have an evaluation policy especially for substitutes. Knowing that they can be evaluated may motivate them to do the best job that they can.

Encourage substitutes to join substitute teacher councils and committees at federal, state, or provincial levels. And encourage substitutes to form professional groups at the district level.

By encouraging substitute teachers to join councils, committees, and professional groups, school districts show them that they are valued professionals.
Include substitute teachers in service awards.

Awards for service can give substitutes respect and authority in the eyes of teachers, students, and the public.

Encourage university education department faculties and teacher institutions to include courses on substitute teaching.

Increasingly, new teachers likely will be spending time as substitute teachers. It has been suggested that colleges, universities, and teacher training schools include courses relevant to becoming a substitute teacher. Professional development courses for teachers, focusing on the issues and concerns of substitutes and how to help them to have a productive day in the classroom, also are recommended. School districts should initiate these types of courses at nearby institutions.

Ensure that information for substitutes and about substitute teaching is handed down through the system so that it reaches substitute teachers.

With the deluge of paper and information that must be disseminated from the school district office, information that substitute teachers should be receiving often is neglected. School districts should be responsible for making sure that substitutes receive messages designated for them. A substitutes’ bulletin board at the district office and the inclusion of information with substitutes’ paychecks are ways to address this matter. In a larger sense, encouraging positive attitudes toward substitute teachers and substitute teaching is a responsibility school districts should attend to. Many school districts have a person in charge of substitute teacher matters. If they do not, they should consider this. This
person, and other staff as well, should be a watchdog for any literature that shows substitute teachers in a negative light. Such negativity needs to be countered with positives.

**Principal Responses**

*Be aware of the challenges that substitute teachers face.*

Substitutes are faced with several questions when they arrive at a school. After they have found a place to park, they must find their way to the classroom. They need to have adequate lesson plans, seating plans, and other pertinent classroom information. They may have to find their way to the gym, the music room, or the computer lab. They want to know the location of the staff room and the names of the teachers they will be working with that day.

*Make substitutes feel welcome, and check with — or designate someone to check with — the substitute during the day.*

If a principal is not able to welcome a substitute teacher who is new to the school, he or she ought to designate another staff member to do so. Another approach to welcoming substitutes is to implement a buddy system whereby each teacher is responsible for another teacher’s sub. The buddy can give the substitute a copy of the school handbook and show the substitute to the teacher’s room and the staff room. The buddy can check with the substitute teacher during the day and answer any questions.
Make sure that students, staff, and parents know that a substitute teacher is another teacher who deserves respect.

As leaders in their schools, it is important that principals convey the idea that the substitute teacher is a professional and deserves that respect. School policy should make this clear to parents and students. Teachers and other staff members should be encouraged to promote substitute professionalism by means of their words and actions. Substitute teachers need to be respected by all those involved in a school so that they be seen as having authority in the school and the classroom. This authority contributes to good teaching by the substitute and a positive classroom experience for students and substitute.

Ensure that teachers leave lesson plans, seating plans, and other pertinent information.

To assist the substitute teacher in gaining authority and respect in the classroom, the principal is responsible for making sure that teachers leave the information necessary for the substitute teacher to carry on the daily classroom routine. The importance of detailed lesson plans and seating charts cannot be over-emphasized. Lesson plans make sense. They outline what the students are to learn and direct substitute teachers to appropriate teacher resources where information can be found. They make substitutes credible and provide them with the means to teach. Encouraging teachers to compile a substitute teacher handbook can be beneficial to both the substitute and the teacher.
Ask that substitutes leave a report at end of their assignment and ensure that teachers do not ignore these reports.

While most substitute teachers leave some report for the classroom teacher, a page in a handbook or a handout from the principal or teacher will facilitate this worthwhile activity. When there are concerns expressed by the substitute teacher, principals should encourage teachers to follow up on these concerns, as well as to contact the substitute.

Have the substitute teacher do only the supervision scheduled for the teacher being replaced and allow substitute teachers to keep preparation time they might have for that day.

Substitute teachers often find that they have not only the supervision schedule of the teacher they are replacing but also several other supervisions as well. Principals need to ensure that this does not happen. Principals also should ask their teachers not to trade supervision times with other teachers when they know a substitute will be in for the day. By the same token, principals should not place substitute teachers in another teacher’s classroom when the substitute has prep time. These practices are not fair to the substitute teacher and can take away valuable time the substitute needs for orientation, preparation, or even simply eating lunch. Principals need to think about such policies as no supervision for substitutes until they have been at the school for at least two days and allowing the substitute some prep time even if none is on their schedule for that day. All of these considerations make for more positive and effective use of the substitute teacher’s
time and, in the end, can provide a good learning situation for the students.

Arrange for a substitute orientation at the school. Make a place for substitute teacher information on the staff room bulletin board. And invite substitute teachers to staff meetings, school professional development days, and social events.

Principals, especially of larger schools where there are a number of substitute teachers on any given day, should consider having a short daily orientation for substitutes. The principal or a designee can show the substitutes around the school, pass out handbooks, show substitutes where information they may need to have is located, and suggest that they join the substitute teachers’ council if there is one. A formal invitation to staff meetings, professional development days, and staff and school social events also can be given at this time. The substitute teacher can then feel part of the school team and may be more willing to become involved with school affairs.

Encourage the school staff to adopt and promote a positive attitude toward substitute teachers and substitute teaching — and encourage substitute years of service awards at the district and school levels.

Principals as leaders should be discussing substitute teaching issues and concerns with the substitutes they employ. Likewise, principals can promote discussion and collegiality among teachers, other school staff members, and substitute teachers. Collegiality is important to substitute teachers. Fostering input from teachers and students regarding special recognition for
substitutes or holding a substitute teacher appreciation day will give substitutes a feeling of value and belonging to the school family.

Formulate guidelines for classroom assistants.

A concern among substitutes is the role of the classroom assistant. While substitute teachers welcome assistants in the classroom and find them valuable resources and helpers, some substitutes are finding that assistants sometimes overstep their authority. At other times, assistants, though they are required to, may not stay in the classroom at all. Principals should explain to assistants that substitute teachers have full authority in the classroom and that it is not appropriate for the assistant to discipline and teach. Furthermore, if there are any concerns that assistants have, they should be written out for the substitute, the teacher, and the principal to act on. The assistant should not discuss these concerns with other assistants, volunteers, or staff. Misunderstandings can lead to unprofessional conduct by classroom assistants and even volunteers. This situation is not good for either the substitute teacher or the classroom teacher.

Agree to evaluate substitutes if asked.

If the state or provincial school district allows principals to evaluate substitute teachers for permanent certification, then principals ought to assist substitutes with the required evaluation. Many principals say that they do not see a substitute often enough to be able to evaluate them fairly. However, if a substitute teacher who is frequently at a school asks the principal for a series of classroom visits for evaluation purposes, then
the principal should comply. By the same token, principals can help substitute teachers who want to be evaluated by calling them often to their school or asking that their teachers do the same.

Recognize the importance of handbooks.
Handbooks are one of the most efficient and practical ways to give substitute teachers information. School handbooks can contain the school philosophy, key policies, bell times, a map of the school, parking stall allocations, emergency procedures, and other necessary information. Being armed with a handbook enables a substitute teacher to feel secure in any authoritative role involving school procedure and policy.

Help substitute teachers obtain better wages and benefits.
With tight education budgets seemingly everywhere, it is sometimes difficult for principals to accept action for better wages and benefits for substitute teachers. However, principals should encourage the teacher association representative for their school to let substitutes know about voting privileges, professional development funds, negotiation meetings, and other information to which substitutes are entitled. Principals ought to encourage their teachers to accept substitutes as professional equals in teacher association matters. Perhaps professional development, a satisfying salary, and good benefits may contribute to improved substitute teaching.

Teacher Responses

Explain to students and parents that substitute teachers have authority and should be respected.
Teachers, like principals, have the responsibility to instill in their students and their parents respect for the authority of a substitute teacher. On the first day of class, classroom teachers should talk to their students about how to behave when a substitute teacher is in the classroom. Some teachers prefer not to tell their class that a substitute teacher will be coming; others prefer to do so. Nevertheless, students’ attitude toward a substitute teacher can be strongly influenced by the regular teacher. Substitute teachers are well aware of which classes lack respect.

*Teachers should leave lesson plans, seating arrangements, and discipline procedures for substitute teachers.*

Floundering in front of a noisy class, looking for books, page numbers, and materials — compounded by not being able to call students by their names — can make a substitute teacher look silly and out of control. Since the substitute is responsible for the running of the class that day, teachers should leave them with some measures to keep control in the classroom. Preparing a handbook for substitute teachers can facilitate these responsibilities. Beside pages for lesson plans, a seating chart, and discipline polices, the handbook should contain: names of student helpers; names of students with discipline problems; names of students with special needs and medical needs; name of the teacher “buddy”; classroom teacher’s home phone number; and all other pertinent information, none of which is too small to overlook. A handbook enables the substitute to be familiar with the daily routine of the classroom. In
turn, the experience of a substitute teacher can be rewarding for students and substitute alike.

_Alternative substitutes to teach and use their own innovations in the classroom._

Most classroom teachers like substitute teachers to bring their own knowledge and expertise to the teaching day. Most substitute teachers do not like to be given busywork and book work for the students, and it is best to avoid this kind of assignment if possible. Often students will tell a substitute, “That’s not the way our teacher does it.” Teachers can encourage their students to be open to innovation and change (though substitutes are the first to admit that some students cannot handle this). Allowing substitute teachers to teach a lesson may give them some authority in the eyes of the students.

_Foster collegiality with substitute teachers._

Teachers, whether encouraged by principals or not, should make a point of introducing themselves to substitute teachers. Teachers should make subs feel welcome. Teachers can ask substitutes about themselves and talk to them about education issues. Teachers should invite substitutes to lunch if some of them are going out. Involving subs in staff activities and special classroom or school activities also helps to dispel the feeling of isolation substitutes often encounter. Consider not asking, “And who are you today?” Back substitute teachers in their negotiations for wages and benefits.

_Talk to classroom assistants and volunteers about authority and respect for substitute teachers._
As are principals, teachers should be responsible for explaining to assistants and volunteers that the substitute teacher is someone who has authority and should be respected. By their own actions, assistants and volunteers should convey this respect toward substitute teachers to the students.

Although each of the above points covers a wide area of teacher responsibilities, there are further obligations for teachers in particular situations. Following are three checklists that teachers in special situations may find helpful in working with their subs.

**Plan Ahead for an Unexpected Absence**

☐ Explain to students in advance the expectations for the class when the teacher is away unexpectedly, and designate helpers.

☐ Ensure that your substitute teacher handbook is up to date.

☐ Have ready-made lesson plans for any given day or make arrangements to send lesson plans and other materials necessary for that day with another teacher or some reliable person.

☐ Agree with another teacher to assist the substitute teacher when either is away unexpectedly.

☐ Ask for a report from the substitute teacher and follow up on any problems that need attention. Praise the class if they have been well behaved.

**Communicate About a Planned Absence**

☐ Contact the substitute teacher and talk about the planned absence or arrange to meet in the classroom if the assignment will be longer than two days.
☐ Explain classroom procedures and rules and encourage the sub to ask questions.
☐ Make your substitute handbook available.
☐ Provide lesson plans that give the substitute teacher opportunities to teach and to evaluate students.
☐ Leave plenty of work for the substitute teacher and the students—even if it is likely that some of it will be left undone.
☐ Ask for a written or oral report from the substitute teacher at the end of the assignment.

Some special considerations must be made in the case of special needs classrooms. Following is a checklist for those situations.

**Plan for Special Needs Substituting**

☐ Leave detailed plans and procedures with attention to each student's particular needs, including a copy of students' IEPs (individualized education plans).
☐ Assure students that the stranger in the classroom is a substitute teacher who is another teacher and is there to help them.
☐ Assure students that the substitute teacher is not a threat to them if concerns arise in classrooms for students with emotional or psychological disabilities.
☐ Make handbooks available for both substitutes and classroom assistants.
Responsibilities of Substitute Teachers

Besides being effective in the classroom, substitute teachers have a major responsibility to show other educators, students, school staff, and parents that they are as professional as the teachers they replace if they expect to be so regarded.

When principals and teachers give substitute teachers the tools (lesson plans, seating plans, discipline procedures, handbooks) and the authority to function as a teacher, substitute teachers should be committed to doing their best work. They should be outgoing and considerate toward staff and students. They should consult and be familiar with curriculum guides for the grade levels and subjects they are asked to teach.

When they are in the same classroom or class over a period of time, they would do well to be in contact with parents if necessary. If either a problem or a reason for praise arises while a substitute teacher is in the classroom, then the substitute should consider phoning the student's parents or the person responsible for the student. Problem students often will shape up if the
substitute teacher is in contact with a person in authority at home. At the same time, parents appreciate a kind word about their children from the substitute teacher.

In elementary schools, where substitute teachers often encounter parents in the classroom, subs should take time to interact with parent volunteers. They should show concern for the students and the work that students do. On the school grounds or during indoor supervision, the substitutes should interact with students. They can play games, chat, get involved with lunch-hour activities, and offer their expertise in any special area. If invited to attend a staff meeting, they should go. They should ask to be included in special activities at the school. If another class is studying something in which the substitute teacher has experience or expertise, he or she might offer to bring slides or photos of places they have been, do crafts, or talk to students. The sub also might invite staff and students in to view the students’ play, music, speeches, or special projects in the classroom where the substitute is teaching.

Following are some additional considerations for substitute teachers:

*Keep the lines of communication open to principals and teachers.*

Principals and teachers will not be aware of any concerns that substitute teachers have about the school or the classroom unless subs tell them. Substitutes can make suggestions tactfully to principals and teachers about how to improve the substitute teacher’s routine at the school. They can suggest handbooks if the school or class-
room does not have them. They can request lesson plans and seating charts if they are not in evidence. They can ask for a spot on the bulletin board in the staff room and suggest that any information pertinent to substitute teachers be put there. Substitutes can request an invitation to staff meetings and professional development activities. They can show an interest in teaching issues by attending the teachers' convention for their district. Finally, they should talk to principals and teachers about their issues and concerns. Several substitute teachers who are often at the same school might offer a workshop that deals with subbing concerns and ways in which the classroom teacher can help substitutes do the job.

*Take every opportunity to foster a positive attitude toward substitute teaching.*

Substitute teachers should ask students about their views on substitute teachers. See what students have to say and discuss those ideas with them. Reinforce the positive aspects of substitute teaching and the fact that the substitute is a person who should have authority and respect. In the staff room, substitutes should talk to the principal and other teachers and assistants about what they are doing in the classroom. If substitutes wish to be evaluated, they should take the initiative and ask whoever is in the position to do evaluations to assist them with this request. Finally, substitutes should look on their days of subbing as a positive experience for themselves.

*Consider asking for help from administrators and other school staff.*
A substitute teacher's responsibility is to provide the best learning situation possible. If subs can't find what they need, then they should ask another teacher. If they are not clear about school policy or procedure or what is in the handbook, they should ask the administrators. If they wish to do something special or different in the classroom, they should not be afraid to inquire about what is allowed. If they need more time to finish something in the classroom or a more convenient time for a project, they should ask teachers to switch or combine classes. Teachers often ask subs to facilitate their teaching schedule. Substitutes should be responsible for seeking the same help from other teachers in order to allow for a positive teaching school day.

Professionalism and Advocacy

Substitute teachers must commit themselves to professionalism. Even if subbing is merely a means to an end (supplemental income, a permanent position) it still is important for each substitute teacher to be a positive advocate for the professionalization of substitute teaching. This means working for greater professional regard, higher status, and more equitable pay. Such advocacy may not be easy, and there may be obstacles, not least of which can be a measure of apathy from regular teachers. Nevertheless, the goal of professionalism is worth pursuing.

Following are recommended steps for substitute teachers to take in advocating for professionalism:
1. Talk to principals and teachers about the issues of regard, authority, and collegiality and how these issues concern substitute teachers.
2. Talk to principals and teachers about how providing fair and equal substitute wages, benefits, and professional development contributes to effective teaching and positive classroom experiences.
3. Get involved with the teacher association to help provide:
   - substitute teacher representation on local groups, councils, and committees;
   - appropriate classroom materials;
   - attendance at education conferences or workshops;
   - equitable hiring practices;
   - input into salary and benefits negotiations; and
   - teacher service awards.
4. Get involved with the schools and help to provide:
   - substitute teacher bulletin boards;
   - substitute teacher cubicles in the school office;
   - invitations to staff meetings;
   - substitute teacher handbooks; and
   - admission to the staff social climate within and outside the school.
5. Become more aware of professional responsibilities by:
   - helping to define the professional status of substitute teachers;
   - contributing to the professional status image of substitutes; and
   - promoting and attending substitute teacher professional development sessions.
Toward a Positive Future

The lot of the substitute teacher has improved in many schools and districts, but there is much work ahead for all educators. The onus is on substitutes to make substitute teaching a positive teaching and learning experience for all involved. Substitute teachers are also charged with being responsible for their own professionalism. But administrators and teachers also need to play their part in improving the work lives of subs. Some questions for all educators include:

- Do regular teachers perceive substitute teachers' authority in the classroom in a different light than do substitutes themselves?
- Do substitute teachers feel they have no authority in the classroom?
- What do substitute teachers want and expect in the classroom?
- What do substitute teachers want principals and teachers to do?
- What should principals and teachers expect of substitutes?
These questions are merely starting points for thinking about and working toward greater professionalism for substitute teachers.

The perception of substitute teachers and substitute teaching often is not positive. Over the years educators have tackled the issues of substitute teaching and have put into practice several recommendations to improve the job of the substitute teacher. Further improvement is a shared responsibility. The doors to communication must open both ways if students are to benefit fully when a substitute fills in for their regular teacher.
Resources


Gaffney, M. *A Substitute Teacher Management Program to Enhance Communication Between Substitute and Classroom Teachers at the Middle School Level.* Fort Lauderdale, Fla.: Nova University, 1989.


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