The Planning and Adoption of a Merit Program for the Rush-Henrietta Central School

Donovan A. Shilling

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THE PLANNING AND ADOPTION OF A MERIT PROGRAM FOR THE RUSH-HENRIETTA CENTRAL SCHOOL

DONOVAN A. SHILLING

SUBMITTED IN PARTIAL FULFILLMENT OF THE REQUIREMENTS LEADING TO THE DEGREE OF MASTER OF SCIENCE IN EDUCATION

STATE UNIVERSITY OF NEW YORK COLLEGE OF EDUCATION BROCKPORT, NEW YORK

JUNE 1960

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Infinite gratitude must also be extended to my wife, without whose understanding and determination this paper would have never reached culmination.

To all of my friends and fellow colleagues who have graciously offered encouragement and advice, I wish to express my lasting thankfulness.

1. List of consultations, p. vi.
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INTRODUCTION

The complexion of American education is continually changing. These changes are reflections of the political, economic, and technical forces which bend and shape all phases of the school program. This molding process is further reflected in American society and its demands.

Today the demand is for quality education. For, now more than ever before, American citizens must be mentally well equipped. It is of extreme importance in view of the pressures growing from the East-West power struggle whose outcome threatens to change our very civilization as we know it.

In order to attain this desired high degree of education a similarly high caliber of teacher must be attracted and retained in the educational field. School boards, for this, and similar reasons, have been looking deeply into techniques for maintaining a faculty of competent educators in their districts. One possible solution is the establishment of a sound program of merit.

The writer of this paper wishes to make available to those interested, some of the more recent information concerning merit; its problems and its possibilities.

1. See appendices B., C., D., and E.
CHAPTER I  WHY MERIT?

THE PURPOSE OF THIS PAMPHLET

In an effort to enhance professional growth, attain quality, and also provide a sound method of rewarding outstanding teachers, an evaluation program for merit has been adopted for the Rush-Henrietta School System. The initiation and implementation of this program has been undertaken by the Board of Education with the aid of the Administration and a faculty Merit Committee.

The result of this adoption will affect every faculty member in a direct or indirect manner. For this reason comprehensive understanding of merit; its problems, and possibilities, is a must. Without such knowledge serious misconceptions may develop. Therefore, to facilitate the needed communication, this handbook was written. It is hoped that the research included here will promote a clear picture of the merit plan taking shape within the school district. By doing so possible misunderstandings will be eliminated and numerous questions concerning the program will be answered.

THE CONTENTS OF THIS PAMPHLET

This pamphlet will attempt to further sharpen the merit picture by focusing directly on:

* Events which led to the adoption of a merit program and the objectives for which such a plan was initiated.
Purpose:

Discussion of the teacher's philosophy of evaluation.

Review of several teacher stimulation and evaluation techniques now in use in this area.

Examination of current merit programs in this state.

Analysis of the evaluation devices our own program is employing.

References which will prove helpful in further study of the merit concept.

An Explanation of Terms

One of the chief barriers to the adequate understanding of a program such as this, is the semantics involved in its explanation. All too often the terminology used by administrators is crystal-clear to some staff members, but is far from clear to others. This difficulty arises because each individual interprets what is said in the light of his own experiences. In a program dealing with an issue as emotion-packed as merit rating, it is highly important that we all share the same common definition of terms.

Perhaps this list of terms and their definitions will settle possible confusion and avoid future misunderstandings. The pamphlet refers to these words or terms in the following manner:

- **Increment**: An addition or gain, usually in salary, which is cumulative from step to step on an annual salary schedule.
- **Bonus**: A premium, usually money, given in addition to a regular salary. A bonus is most often awarded sporadically and is not cumulative from year to year.
Merit Rating: A subjective, qualitative judgement made by a rater, with or without the participation of the person rated, for purposes of determining salary, promotion, or reward.¹

Evaluation: A broad term covering all forms of judgement, including rating for merit. The term is most often used when referring to the continuous process by which individuals or groups, through mutual participation by all persons concerned, are enabled to make choices and reach decisions in planning for growth.²

1. A. J. Huggett and T. K. Stinnett, Professional Problems of Teachers, p. 133
2. Ibid.
Teachers, Teaching Staff: Professionally trained individuals, such as classroom teachers, consultants, or special subject instructors who are employed to direct the children's education.1

Administrators: Professionally trained persons, such as principals, supervisors, superintendents, or board of education members whose task is to provide wise leadership and direction for the teaching staff.

Teaching Excellence, Quality Teaching: Since few educators can agree to a specific definition of these terms, the validity of research findings in this area have been somewhat hampered. Furthermore, an adequate, explicit description of these phrases would require something approaching textbook length. In addition, the terms "teaching excellence" and "quality teaching" are limited in meaning since they imply only one of a teacher's many roles... classroom instruction.

Perhaps the terms are best defined by relating them to the qualities teachers should possess when rated in an individual school system. A broader term, "professional competence in education", seems better suited here when referring to those often intangible traits teachers must display in order to qualify for merit advances. A definition of this more general term includes the teacher in the multiple roles of:

"(a) a director of learning, (b) as a friend and counselor of pupils, (c) as a member of a group of professional workers, and (d) as a citizen participating in various community activities - local, state, national, and international." 2

Automatic Salary Schedule: The school board is mandated by New York State to provide at least 9 increments, and consequently the schedule

1. National Educational Association, Better Than Rating, p. 9
must have a total of at least 10 steps. Advancement on this schedule is automatic when a teacher is certified permanently. It is also possible for a local school board to adopt a local schedule which provides merit increases in the schedule.  

The Events Which Led to the Adoption of our Merit Evaluation Program

Now that the merit evaluation program is underway, several questions are repeatedly being asked. We hear, "Where did it come from?", "Whose idea was it?", "Why do we have it?", and "What real benefit will it give us?". To provide answers to these comments the events connected with merit have been chronologically arranged. This information has been gathered almost wholly from notes and minutes of various salary and merit study committee meetings.

The membership of these committees was formed largely from interested staff members. Two or more teachers were chosen by each building principal or by faculty members from a list of those who showed a desire to participate. Their chairman and other officers were then elected by the participants at the opening meetings for each school year. Frequently administrators were present at these meeting to offer suggestions and hear reports of progress.

February 11, 1958

The minutes of this meeting, under the leadership of Mrs. Mary Vollmer, dealt with the merit question in the following resolutions:

3. Resolved to suggest a merit level from Step 11 to 13 with $6300 - $7000 range to allow for the rewarding of outstanding teachers as the administration sees fit within these ranges.

4. Resolved to suggest a second merit level at steps 11 to 13.

1. William J. Hagner, Handbook on New York State Education Law, p. 18
15 and 16 with a range of $7100 - $7500. A third merit level to cover the range of steps beyond the 16th might be discussed at a later time."

September 15, 1958

The Salary Committee chairman for the school year 1958-1959 was Harold Manning. His committee made this resolution at their initial meeting:

"2. Resolved that the Board of Education seriously consider a year by year merit system which will parallel and be in addition to, the salary schedule in resolution one."

November 17, 1958

At this date, the salary committee met with representatives of the school board. Mr. Thomas Taety, Board President, suggested that the salary committee study merit beginning at the fourth salary step. He further suggested administering a merit bonus in a vertical system on the salary schedule. By going in a vertical direction the bonus might be a salary step one or more steps above a teacher's normal salary.

December 3, 1958

As a result of an opinion questionnaire regarding merit rating that circulated through the school system, a salary schedule was formulated by the salary committee. It contained not only the regular salary proposal, but also provisions for a merit bonus for all of those who displayed teaching excellence. The schedule was then submitted to the Board of Education for their consideration.

Among the recommendations cited by this schedule were the following statements referring to merit:

"1. Steps 1 - 10 would be passed through automatically with each year of service in the Rush-Henrietta School District."
2. Increases beyond step 10 and up to $8500 per year would be granted according to a classroom performance rating.

3. Regulations for rating merit bonuses would be established by a representative group from the Board of Education, Administration, and Teaching Staff. Final rating of merit bonuses would be by the Administration who would utilize the rating guide entitled: The Evaluation Record.

4. Merit bonuses would be awarded beginning at the fourth salary step for those teachers who display excellent classroom instruction.

5. Increases in 2 above, if granted, would be not less than $100 nor more than $400 per year. This also applies to merit bonuses in 4 above.

March 9, 1959

At this final meeting of the 1958-1959 salary committee, Mr. John Parker, District Principal, informed those members present that a new salary schedule had been adopted by the Board which would allow most faculty members maximum increments of $400 for the coming year. He added however, that this schedule was just for the forthcoming school year. Thereafter, all staff members would be rated before determining their salary increases. He also suggested that a committee for merit be set up prior to October of 1959 to draw up objectives for the merit program and decide upon the type of evaluation device to be used.

May 15, 1959

In a bulletin to members of the Merit Study Committee Mr. Parker requested that those people who have been chosen to represent our professional staff, begin immediately compiling useful data regarding merit evaluation. He further underscored the significance of the committee with this statement:

"This is a very important assignment and I hope that you will accept it with the knowledge that it will require work, time, patience, and cool thinking."
May 20, 1959

Under the chairmanship of Mr. George Rittenhouse, the Merit Study Committee for the school year 1959 through 1960 was formed. This initial gathering drew up the tentative plans and ideas which they felt would lead to a solid, workable plan for carrying out our merit evaluation program.

September 22, 1959

Chief among the decisions agreed upon at this meeting was the one selecting a rating device to be used by the administrators in determining who will qualify for merit. The device chosen was the Bardeen Teacher Evaluation Report, Form 91-B. In Chapter five a description and explanation will fully cover this rating instrument.

September 30, 1959

According to the minutes of the Merit Committee meeting bearing the above date, the following recommendation was drawn up:

"3. That the administration will carry out rating as such:
   a. minimum of 1 scheduled visit by 1 administrator,
   b. minimum of 2 informal visits by that same administrator and another administrator,
   c. conference with administrator on the day of the visit,
   d. teacher rates self,
   e. administrator rates teacher
   f. final conference with teacher to determine merit rating before Easter recess."

Mr. Parker later stated that the conference in "f" above was to be held not later than the first week of April.

October 19, 1959

Both the Merit Committee and many members of the Board of Education and Administration were present at this meeting held at the District Administration Building. During the meeting the progress of the committee was noted and Mr. Rittenhouse presented a report containing
objectives for our merit program. These objectives are further discussed on pages 9 to 24.

Another facet of this gathering was this statement that, "In the near future the Board of Education will have in your hands their philosophy of the Merit System." 1

The Objectives of the Rush-Henrietta Merit Program

In the early years of American public education teacher evaluation was done by the town's selectmen. These community pillars made school visits to ensure that the school "marm" or "master" was adequately putting across the three R's. The major criterion they used in judging the teacher's competence was usually the quality of classroom "discipline" and perhaps the degree to which the children could deftly parrot answers during the visit.

Most educators agree that the profession has come a long way since those early times. However, one aspect has not changed greatly since Ichobod Crane courted the shapely Katrina Van Tassel. Teachers are still being visited for evaluation purposes. In the Rush-Henrietta System several objectives have been advanced for teacher merit rating. Briefly, here are the main goals which this evaluation program hopes to accomplish:

Goal I. To Maintain High Standards of Teaching Effectiveness

When teaching quality is maintained or sparked to greater effectiveness everyone reaps the benefits but the real harvest falls to the students. This improvement of instruction occurs when professional interest is raised and when teachers are inspired through such devices as

1. See appendix E.
leadership. Does it not seem that merit ratings made under these attractive incentives would have the highest chances for success?

When a teacher has done well there is the satisfaction gained from the knowledge that their accomplishments are recognized not only verbally, but also monetarily. The same evaluation which has revealed this teacher's strengths may also be used to detect the need for growth and improvement in another instructor. These people, tactfully made aware of their position, may seek to correct their less developed talents. Finally, others, learning what standards are held important in our system, may also continue to improve the quality of their instruction and remain on their toes as a result of having definite goals for which to strive.

Goal II To Recruit and Retain Competent Teachers

According to W. I. Cragg,1 superintendent of schools in Ithaca, New York, many school boards are faced with limited budgets, yet they must increase salaries in order to recruit and hold their teaching personnel. The boards facing this problem say "reward for professional service should be commensurate with the value of service rendered."

In other words, more pay for competent teaching.

Many school boards also feel that in view of today's spiraling economic situation, no district can afford to pay continually under par teachers the same salary as those who perform well. Merit is an attempt to solve this dilemma and prevent the able teachers from being "driven off" to higher paying, more attractive systems, or other positions outside the field of education.

1. "Merit Pay for Teachers," The Nation, p. 528
Goal III. To Promote the Desire for Professional Improvement Among the Teachers

Ratings for merit may be utilized to uncover and analyze an instructor's characteristics in the areas of teaching efficiency, the profession, and personal abilities. When an area for improvement is discovered, adequate supervision may often promote in teachers a desire to work toward their own betterment. This growth may take the form of graduate work, committee leadership within the system, or active participation in community activities.

Such a desire for further professional training is stimulated not only with that familiar rustle of green, but with a deep understanding of human needs and problems. Here, perhaps, thoughtful kindness and respectful suggestion techniques should form a partnership with financial rewards.

Goal IV. To Form a Closer Relationship Between Teacher and Administrator

With the establishment of the merit program many school policies heretofore unwritten or unvoiced are being brought to the attention of both the Administration and the teaching staff. This defining of policies should help all concerned by informing them of what is expected and thereby preventing future errors or inconsistent practices.

Along with this greater consciousness of policies, the merit program will also create a closer relationship between administration and staff. Both teachers and their supervisors will very decidedly have to work diligently to build and retain the others confidence. This goal, above all others, is the key factor in encouraging the general acceptance of our merit program. Only when the teachers feel that the administration
has their sincere interests at heart will full cooperation and participa-
tion develop.

Competent leadership can establish the required esprit de corps.
Furthermore, each staff member must try to learn more of the administra-
tion's duties, problems, and personalities. Conversely, each adminis-
trator must continue to be ethical, open, and able to communicate
honestly with his staff.

Goal V. To Promote Greater Public Interest in Education

Members of a community, especially parents, often evaluate our
schools through the eyes of the youngsters that attend them. Each child
becomes a courier of news under these circumstances. This does not imply
that the mothers and fathers of our district are not discerning enough
to weigh the reports of their young ambassadors. However, when word
continues of uninteresting school work, classmates repeatedly in trouble,
and numerous teacher changes, a rather unpleasant picture begins to take
shape in the public's mind. It is apparent that mediocrity exists in
leadership and staff. Such a system would promote a great deal of public
interest, but none of it desirable.

Another system might have entirely different reasons for attract-
ing public interest in its education. School children who return home
with chatter about fascinating classroom activities, special groups in
reading or arithmetic, and interesting projects they are doing, form a
bright picture indeed. This stimulation of public interest is of the
type widely sought after. It is won through the competent leadership
and supervision of teachers who desire to enlarge upon their own talents
by widening the horizons of the boys and girls they educate. In short,
quality students through quality teaching, through a quality incentive
program.

Rush-Henrietta has now undertaken a program of teacher evaluation
which may well place our system, in the public's eyes, in either of the
two categories just mentioned. It is up to us to make the program suc-
ceed. We can have a "Lighthouse system" showing others the way or we can
hide our lamp of learning under a bushel. The choice is ours...

Goal VI. To Reward Superior Teachers

This goal, above all others, has been repeatedly voiced by our
own school board as being the prime reason or objective for adopting a
merit rating program. Their thoughts are similar to these. Teachers,
like the pupils they teach, do not all grow at the same rate. Some
teachers are continually outstanding in their skills, attitudes, and
personal characteristics. Others have not yet developed these talents to
their fullest. As a result, the merit program employs several rating
devices or score sheets in an effort to seek out those who are top-notch
teachers.

The merit committee's recommendations suggested that three groups
of teachers be considered for merit ratings. The first group would
receive a salary advance of attractive proportions great enough to equal
the high criterions set for this category.

In addition, these ratings will also uncover a second group con-
taining "above average" teachers. Their scores will place them just
below the ratings of the elite. Both groups of outstanding and above
average educators might receive an appropriate salary advance. Those
staff members who fall into the third group, or average category, should
not, however, suffer disappointment or injured vanity. If such a program operates smoothly, they will still receive the normal increment paid to all teachers as a provision of the automatic salary schedule.

Even in rare instances, where staff members fail to receive ratings sufficient to place them in the upper levels, a token increase might still be given. Therefore, it can be seen that although the merit program is primarily directed toward rewarding the most competent of instructors, it will also recognize, to a varying extent, all those who attain intermediate degrees of educational efficiency.
CHAPTER II A PHILOSOPHY OF MERIT EVALUATION.

The teacher's philosophy of merit evaluation will incorporate a kaliedoscope of ideas, opinions, and thoughts. This philosophy has been assembled from numerous interviews with educators in many positions ranging from the classroom teacher to the district county superintendent. Some statements originated from experience, some are educated guesses, and others are based on desires which now exist only in an educational utopia.

For ease of understanding, these many facets of thinking have been set in a framework of responsibilities. These responsibilities in turn, may be viewed in four major divisions. They are our responsibility as teachers to, (1) our students, (2) profession, (3) our society, and (4) ourselves.

OUR RESPONSIBILITY TO OUR STUDENTS

As teachers in a democratic society we have an immense responsibility to the youngsters we educate. Ours is the duty to pass on to them the World's great heritage of knowledge. This knowledge includes the abilities taught in elementary school to appreciate, to calculate, and to communicate. We must also equip them with the concepts of citizenship and freedom in a democracy. Thus endowed, these citizens of

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1. New England School Development Council, Teacher Competence and its Relation to Salary, 1956. This council has advocated a concept of professional roles, proclaiming that a teacher has fourpublics parents, pupils, colleagues, and profession.
tomorrow will be better prepared to wrestle with the economic and social problems of an expanding population in an ever shrinking world. We hope we have taught well, for their decisions must be wise in an era when rocketry and nuclear physics are rushing the remaining years of the twentieth century to a mind-staggering and spectacular close.

With this background we now must ask ourselves sincerely, "What effect will merit evaluation have on the true purpose of education which is, to benefit the children?". If there is any validity to merit rating, it should pass this test; it must be of value to the children who attend our schools.1

Where merit evaluation does promote greater efficiency of instruction, there can be little or no doubt that the students also are profiting immensely by sharing in this enrichment of instruction. When teachers have been favored with confident leadership and direction merit rating has meant additional teacher growth and development.2

To illustrate this, we might direct our attention toward some of the nation's leading school systems such as those in Glencoe, New York, Grosse Pointe, Michigan, and West Hartford, Connecticut. Here merit has been a success. And, according to W. L. Gragg,3 no inferior school system to his knowledge, employs the merit system. In other words, he implies, there is a clear and positive relationship showing that in good school systems the merit plan improves the student's education,

1. David C. Guhl, "Basic Issues in Merit Rating" in "Merit Rating" for Teachers, p. 13
3. Ibid.
while in under par systems the merit approach is seldom adopted and therefore cannot be used beneficially.

A possible attitude might be created by this picture. If merit ratings foster greater professional competence in education, is it not our responsibility to our students to honestly give the program an opportunity to prove itself?

OUR RESPONSIBILITY TO OUR PROFESSION

As professional men and women, teachers have an obligation to support their field. We also can see the advantages of possessing an intelligent understanding of the recent issues in education. In regard to these issues, most of us educators have our differences of opinion on these traditional or progressive policies. Fortunately, most of us also have the wisdom to reserve our most critical judgments until all the available facts have been tallied.

It is true that merit evaluation programs have not always been successful in other systems. However we may not all share the realization that merit is a fairly new concept still in its experimental stages. Paul Mort, a leading educational author, reports that on many such new educational concepts there was an educational lag of almost 50 years before the concept gained wide acceptance.

Another source which requests a similar long range view of this type of evaluation is contained in a pamphlet on personnel practices published by the New York State Teacher's Association. In it we are

1. Virgil M. Rogers, "Introduction", "Merit Rating for Teachers?", p. 6
2. Paul R. Mort and Francis G. Cornell, American Schools in Transition, p. 26
offered this advice:

"Teachers should not lose sight of the fact that the primary purpose of evaluation is the improvement of instruction. In this connection, it is well to note that an ingredient necessary to the improvement of instruction is mutual confidence and that mutual confidence may be engendered through frequent, periodic, friendly conferences between the evaluator(s) and the person evaluated, conferences in which the strengths of the teacher are underscored, his weaknesses are recognized and plans for their eradication are formulated, followed, and tested. Teachers have it within their power to develop a climate conducive to professional growth and a happy daily work-life. To do this, they must demonstrate through their behavior a sincere desire to accomplish the goal."

Again, it is apparent that the fate of our merit evaluation program rests with each of us.

OUR RESPONSIBILITY TO OUR SOCIETY

Society, that is, the communities for whom we teach, are another of our major responsibilities. We, in turn, are the responsibilities of these communities. Most of us carry out this community obligation by teaching the youngsters of Henrietta and Rush to the best of our ability. Some of us further meet this duty by becoming active in community affairs.

At this point, let us observe an alternate aspect of teacher-community relations. The responsibility for quality education is a two-way street. First, a glance at the community. A community usually acquires a degree of teaching efficiency which is commensurate with the educational enthusiasm of its inhabitants.

An enthusiastic community, solidly behind a conscientious school board, does much to maintain quality in education. This illustration is representative of such community action. A few years ago a neighboring district's supervising principal was approached by board members of a community so aroused. These community representatives requested premium teachers for their steadily growing school system. The supervising principal then replied, "Give me the resources (a variety of in-service opportunities) and I'll give you the area's finest educators". These resources were made available and today this system has created an enviable position among the county's schools.

Now, a glance at the teacher's position in securing and maintaining competency. It is the writer's belief that both teachers and administrators can do much to make our district educationally more attractive.

At the present, our system is in a unique position in this part of Western New York. Our publicity, thus far, has been neither laudatory nor derogatory. Hence the district's standing is almost neutral in the minds of many beginning teachers seeking employment. It follows then, that now might well be the precise time to build a sound teacher improvement program. A successful merit program, coupled with such teacher improvement opportunities as the proposed internship program, may well give Rush and Henrietta the professional competence in education which these communities owe to their children.

OUR RESPONSIBILITY TO OURSELVES

Now to carry the issue of merit evaluation directly to ourselves. How do we, as teachers in the Rush-Henrietta School system, feel about being rated for merit increases? Thus far, almost all of us have
developed an impartial "wait and see" attitude. This majority, the
writer has found, are the teachers who share the convictions that they
are teaching competently, would therefore be eligible for a merit in-
crease, and would also gain a great deal more from the additional super-
vision which the program necessitates.

Along with attitude, there are other aspects concerning merit and
ourselves which the writer has observed. Let us examine an area of per-
sonal responsibility. Foremost of these is our duty and desire to
improve the quality of our teaching. To facilitate this improvement it
is necessary to discover the qualities in which we excell and pinpoint
those where improvement should be emphasized. In short, most of us
already recognize the importance of evaluation as a key in opening the
door to self improvement.

However, a small portion of our faculty may not be aware of the
fact that evaluation is far from a new development at Rush-Henrietta.
The system has almost always had an established method of determining
the quality of a teacher's performance. This rating of performance is
done presently at five major times during a teacher's career.

According to Edward J. Popen, our Director of Elementary Education,
our school exercises teacher evaluation in the following instances:
1. The initial evaluation is done when an applicant is considered
for a position in our district.
2. The second evaluation is undertaken when building assignments
are make within the system.
3. The third occasion for evaluation, and perhaps the most
important one is when a teacher is considered for an appointment to
permanent tenure after three years of probationary service.

4. Still another place where evaluation is performed occurs: when teachers are given special assignments such as being placed on important curriculum committees or are selected for similar duties.

5. The fifth circumstance warranting evaluation of performance is carried on when certain promotions are made. For instance, when an administrative opening appears, staff members are screened and evaluated in an effort to single out the candidate who is best qualified to fill this position.

This knowledge of the role evaluation is already playing at Rush-Henrietta may be further fortified with the following statement made in a committee report on merit payments by the New York State Teachers Association:

"Building a staff under the merit principal requires that all personnel added be carefully screened even before hiring, be given all possible assistance during the probationary period by competent and sympathetic supervisors, and be vigorously weeded out in terms of competence at the end of the probationary period; nor can adequate and competent supervision be dispensed with once the teachers have proven their ability - rather, it must be continuous. Thus, it is obvious that administration under the merit principal will be more costly than an administration based on expediency."

In other words, a merit program, with its added supervisory and administrative needs, will cost more. While the administration of an automatic salary schedule is fairly simple and will cost less it will also assure security for the mediocre.

We have discussed our personal responsibility for improving

1. New York State Teachers Association, Report of Special Committee to Study Merit Payments, pp. 70-71
ourselves and have observed the part teacher evaluation has played in our system thus far. Our next consideration then, is to discuss why further evaluation, in the form of the merit program, should cause apprehension among some staff members. In our district the writer has encountered two major arguments. These conflicts seem to be causing most of the insecurity and uneasiness displayed when merit rating is the topic of conversation. What then, are they?

First, there is the problem created by the fact that merit evaluation is based almost wholly on human judgment. This type of judgment, critics tell us, must undergo the normal pressures and prejudices, the likes and dislikes, and the bias that creeps into everyday human relations. And thus, they continue; It is inevitable that favoritism, fears, and human imperfections will stand in the way of an honest and impartial merit evaluation. There is strong evidence that the problem just stated is by far the most common barrier in education to a successful merit plan. Experiencing this problem, one elementary school principal was prompted to offer this warm counsel to other raters:

"Merit evaluation is the very intimate and delicate business of passing judgment on another human being's performance of his chosen life's work. *** In trying to be of help to anyone who may in the future be applying merit rating, I hope it will not be out of place for me to give one more piece of counsel: judging fellow human beings is a business to be entered into prayerfully, seeking resources beyond one's own in being of help and service." 

In reply to this argument concerning human frailties we have the thinking of Dr. Edward C. Merrill, Associate Dean for Graduate Studies at the University of Rochester. He asks this question, "How many times do we place ourselves in a position where human judgment means everything?" Dr. Merrill states the fact that we daily place our trust in doctors and lawyers. We even rely on human judgment when, as in the case of a jury, a human life rests on the evaluation outcome. Therefore, he concluded, most teachers should have little to fear from similar judgments made by raters if they could agree on what constitutes evidence of effective teaching.

The second argument centers around merit's effect on teacher morale. A portion of the teaching staff interviewed contends that merit evaluation is a barrier to morale and therefore hampers the improvement of teaching. They stress the feeling that friendly cooperation and mutual assistance between teachers may be stifled in the race for top rating honors. They also point out that morale is headed for a further nose dive if conformity results because new ideas were shelved in favor of materials that received the evaluator's praise in former visits. The final danger they fear is an administrator turning into a "rating machine". In such an event a teacher seeking aid must choose between concealing her weaknesses from the ogre or revealing them through an "apple-polishing" campaign.

The solution to the first objection dealing with human judgment is probably not within the realm of the teaching faculty. There is however, every possibility that this second argument may be erased by a conscientious teaching staff. The analogy that follows offers a solution.
Teacher morale may be likened to the part precision plays in a fine watch. When each cog (the teachers) works happily the result is a smooth, well running timepiece (the district). The owner, (the community) takes great pride in such a possession. Such faithful performance is often difficult to find. Occasionally a part falters and fails to mesh properly. This part may then be coaxed back in to order or replacement may be necessary. When this occurs the replacement part is chosen carefully and gently fitted into the watch. There are two prime factors which keep the mechanism in top running shape. The first is winding. This the owner applies by twisting the stem (the administration) periodically. The second factor is a drop or two of oil (merit incentives) added where needed.

In less subtle terms, the writer feels that each teacher has the responsibility for assisting any colleague who is experiencing teaching difficulties. For, all too often, an unpleasant situation reflects not only on an individual, but upon the entire school district. Therefore, does it not seem possible, that many of Rush-Henrietta's most knotty problems could be solved with an understanding heart plus an honest, professional attitude?
CHAPTER III
THE STIMULATION AND EVALUATION OF QUALITY TEACHERS

There are several sides to a truly worthwhile merit evaluation program. The preceding chapters make it evident that one dimension of the program's soundness rests on competent and accurate appraisal of meritorious teaching. However, this task of identifying quality teachers with monetary arrows may not always achieve all of the goals for which the program was initiated. With this thought in mind, the question asked by many educators seems to be, "Is salary tied to achievement the sole answer to retaining and producing quality teachers?" According to an institute held by the University of Rochester recently, the answer is, "No!"

The real bulls-eye for a conscientious school board is the continuous improvement of Johnny's education. Therefore it follows that simply rewarding a portion of our teachers is not enough to insure quality instruction in all of Johnny's grades at school.

What then, is the solution? Perhaps it lies in the development of a much broader concept of merit. By doing so, the emphasis would not be directed entirely upon a dollar reward concept for quality teaching. It would instead, be placed upon a parallel aspect of merit. This aspect centers on "opportunity". However, the merit approach, as thought of here, is not only an opportunity for higher salaries, but includes opportunities in the form of a challenging variety of incentive activities and devices. By offering additional incentives the stimulation for improved teaching

reaches the entire school staff, instead of an honored few.

To insure success, the range of activities must have adequate scope so that nearly all teachers may be involved in the program. After administrative selection those who participate may then be awarded a wide range of opportunities. When possible, teachers are permitted to attend professional meetings and conferences, visit other schools and classrooms, or engage in inservice workshops. For such activities, which truly foster professional advancement, classroom substitutes are made available.

Other merit opportunities include summer work related to curriculum planning, inservice training in administration or supervision, and university work toward certification, a master's degree, or a doctorate. Here, the school board may provide the needed monies for participation, or may recognize the hours which often result from such professional development.

From among well over a dozen techniques currently in practice in central western New York State, the following approaches seem to come closest to the idea of "merit opportunities", which will improve teacher performance:

**IN-SERVICE WORKSHOPS**

The provision of in-service workshops is an administrative favorite. Such workshops are held for the purpose of dealing with a vast array of problems. They span from those problems directly related to the subject matter to be taught to educational problems in grouping, grading, guidance and discipline. Such workshops are particularly popular with teachers when
specialists in a certain field are brought in or when the workshop results in in-service credit being given.

**GRADUATE STUDY**

The policy of granting additional salary increments as the result of continued professional preparation is another desirable approach. Both administrators and staff members are pleased with this tangible incentive technique.

**SUMMER CURRICULUM PLANNING**

Some school systems have found that many teachers, especially male teachers with families, are eager to work on curriculum improvement during the summer. These weeks which are spent, might result in enriching the present content taught in a particular area, the development of a new curriculum, or the coordination of subject matter content among grade levels.

**IN-SERVICE LEADERSHIP TRAINING**

At least three area school districts have successfully carried out a program of inservice training for leadership. In these systems candidates were chosen to work closely with their principals and supervisors. When new school buildings were opened, the administrative positions were filled from the teachers who had received this inservice experience.

**PARTICIPATION IN PROFESSIONAL ACTIVITIES**

Both the colleges and universities of this area offer numerous opportunities for study groups, conferences, lectures, and other avenues of professional enrichment. Most schools
encourage, and some often pay for, the teachers membership or attendance at these meetings. Here again, a district which allows its teachers to participate in such work has done much toward improving instruction.

CLASSROOM EXPERIMENTATION

A number of school systems encourage their teachers to experiment with educational ideas in method and curriculum. Such freedom often is an important factor in the difference between a teaching staff slipping into a complacent rut or a faculty enthusiastically alert to new ideas and system-wide improvement.

STIMULATING LEARNING ENVIRONMENT

This is an area where all teachers merit consideration. Much has, and can still be done to provide a pleasant, well equipped classroom. This does not mean "frills", but proper seating, lighting, lunchrooms, faculty rooms, and similar physical considerations. Under bright, cheery surroundings, it seems, both teachers and their charges do a far better job with the curriculum.

ESPRIT DE CORPS

Once again, if a board feels the district's children merit quality instruction from quality teachers, then it must also provide administrators who will create a desirable intellectual environment. When morale and teamwork are built, then each of these "merit opportunities" become important.
SABBATICAL LEAVE

The practice of allowing an educator to take a year's leave of absence for study, travel, or research is not uncommon among institutions of higher learning. The idea is, perhaps, the grandparent of all "merit opportunities". Today this opportunity for a year's professional growth at half salary is gradually being adopted by many local school authorities.

PUBLIC RELATIONS

It is no accident that some schools continually have the names and pictures of their students and teachers before the public eye. This technique of awarding merit through newspaper recognition lacks popularity in some systems.

The point is however, that a system of planned news releases puts a school in a far better light than an occasional column about a P. T. A. Meeting or a vetoed bond issue.

The press is not the only channel to be used. Teachers who are nominated to educational offices or serve through participation in community activities also do much to bring about good school-community relations. This too, is merit in a broad sense.

EVALUATION

Once our faculty has been stimulated into self improvement through an opportunity program of salary merit steps and other incentives, the need for an appraisal of this expected increase in staff efficiency is
necessary. Here, we must consider who will do the rating and how this rating will be done. The evaluation of this growth and improvement is affected in many ways by one or by several persons. Usually this task is carried out by the school administrators and supervisors. In some systems rating is done by the teachers themselves. At other times the teachers find themselves co-operatively appraised by combinations of the individuals just mentioned.

In regard to this rating, the New York State Teachers Association suggests that teachers should not be asked to evaluate each other, nor should supervisory people determine this evaluation. They feel that merit rating is an administrative responsibility best done by principals, district principals, and superintendents. In practice however, the choice of who does the evaluation rests with the individual system.

From here, the next consideration is the establishment of the criteria necessary to measure quality of service. Three important suggestions might well be followed here. The first, that the criteria be based largely on those traits which bring about effective teaching and also on those cardinal objectives set up for the education of our Nation's young people. Second, that the system establishing or adopting such a rating device, be aware of the difficulties and problems encountered in any qualitative examination of a human being. While industry can easily

2. B.J. Chandler and Paul V. Potty, Personnel Management in School Administration, p. 261
2. New York State Teachers Association, Report of Special Committee to Study Merit Payments, p. 18
measure the quality of a product an individual has produced, education cannot as easily gauge the overall effectiveness that teachers have on their human product: our community's children. As one area teacher explains, "You cannot hold a child up for inspection in the same manner that you can inspect the quality of a roll of film." The third point to remember in setting up a method of judging teachers is the tremendous variety of conditions which must be taken into account when appraising any of our fellow educators. In reference to this third point, the teacher's association for our state advises evaluators that:

"A teacher's behavior has to be judged in terms of the conditions under which he is teaching. The most desirable condition for one teacher may be less favorable for another. Different pupils react differently to a given stimulus. The characteristics of pupils, the number of pupils, the physical facilities, the tools and resources available to the teacher, and other factors have to be weighed in making judgments. Absolute judgments are impossible; judgments must be relative."

Now to the selection of some specific characteristics which an adequate rating instrument should contain. Careful selection of these traits will help to keep subjective judgments more objective or at least semiobjective. The framework for these checklist items might easily be taken from the four major responsibilities of teachers cited in chapter two. They include the teacher's responsibility to our students, our society, our profession, and ourselves.

1. New York State Teachers Association, Report of Special Committee to Study Merit Payments, p. 22
A CHART OF CHECKLIST TEACHER CHARACTERISTICS

Let us discover into which category of responsibility the quality traits chosen by the Bardeen Teacher Evaluation Report, Brighton, Pittsford, and an early Rush-Henrietta evaluation sheet will fall.¹

RESPONSIBILITIES TO THE PROFESSION:

<table>
<thead>
<tr>
<th>BARDEEN</th>
<th>BRIGHTON</th>
<th>PITTSFORD</th>
<th>RUSH-HENRIETTA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adequacy of preparation</td>
<td>Leadership—ability Evidence of to organize groups, good planning—responsibility. create better staff, sets up definite.</td>
<td>General sense of morale, its goals and Ability to work with professional groups.</td>
<td></td>
</tr>
<tr>
<td>Growth in profession</td>
<td>Creativity—seeks new approaches to learning problems.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional interest</td>
<td>Initiative—willing to accept new ideas, challenges all ability levels.</td>
<td>Readiness for effective action.</td>
<td>Wisdom in selection of learning experiences.</td>
</tr>
<tr>
<td>Records and reports</td>
<td>Professional ethics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional ethics</td>
<td>General promptness</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

RESPONSIBILITIES TO OURSELVES:

<table>
<thead>
<tr>
<th>BARDEEN</th>
<th>BRIGHTON</th>
<th>PITTSFORD</th>
<th>RUSH-HENRIETTA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appearance</td>
<td>Enthusiasm</td>
<td>Possesses sense of humor, Physical vigor and vitality.</td>
<td></td>
</tr>
<tr>
<td>Personal impression Maturity</td>
<td>Speech</td>
<td>Exercises tact and discretion</td>
<td>Adaptability</td>
</tr>
<tr>
<td>Self-Control</td>
<td>Vitality</td>
<td>Sociability and consideration</td>
<td></td>
</tr>
<tr>
<td>Adaptability</td>
<td>Neatness</td>
<td>Stability and balance</td>
<td></td>
</tr>
<tr>
<td>Physical health</td>
<td>Poise</td>
<td>Tolerance</td>
<td></td>
</tr>
<tr>
<td>Mental Health</td>
<td>Patience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reliability</td>
<td>Initiative</td>
<td>Effective use of voice</td>
<td></td>
</tr>
</tbody>
</table>

¹ See appendices G, H, I, J.
## RESPONSIBILITIES TO SOCIETY:

<table>
<thead>
<tr>
<th>BARDEEN</th>
<th>BRIGHTON</th>
<th>PITTSFORD</th>
<th>RUSH-HENRIETTA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher inspires</td>
<td>Community understanding</td>
<td>Belief in the democratic way</td>
<td></td>
</tr>
<tr>
<td>Attitude toward</td>
<td>Works well with community parents</td>
<td>Furthering democratic ideas through practice and example</td>
<td></td>
</tr>
<tr>
<td>Counsels wisely and tactfully with parents</td>
<td></td>
<td>Interest and support of local school or community</td>
<td></td>
</tr>
</tbody>
</table>

## RESPONSIBILITIES TO THE STUDENTS:

<table>
<thead>
<tr>
<th>BARDEEN</th>
<th>BRIGHTON</th>
<th>PITTSFORD</th>
<th>RUSH-HENRIETTA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pupils show growth in self-control</td>
<td>Develops pride of achievement in pupils</td>
<td>Considers each student as an individual</td>
<td>Contributes to wholesome pupil growth and development</td>
</tr>
<tr>
<td>Teacher stimulates pupil cooperation</td>
<td>Helps pupils see objectives</td>
<td>Acceptable pupil behavior without frequent reprisals</td>
<td>Understanding and consideration of each pupil as an individual</td>
</tr>
<tr>
<td>Study habits of pupils show improvement</td>
<td>Accepts all children and varies methods to meet different pupil needs</td>
<td>Good classroom atmosphere</td>
<td>Assistance or interest in extra-curricular student activities</td>
</tr>
<tr>
<td>Pupils are developing ability to think</td>
<td>Makes use of tests responsibility and control to improve instruction</td>
<td>Encourages pupil independence and self-control</td>
<td>Classroom management</td>
</tr>
<tr>
<td>Pupils are courteous</td>
<td></td>
<td></td>
<td>Activities well chosen</td>
</tr>
<tr>
<td>Intellectual curiosity of pupils aroused</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use of teaching aids and devices</td>
<td></td>
<td></td>
<td>No dull, deadly lessons</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Effective use of source materials</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Inspires eager response from students</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Effective use of instructional aids</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Uses wide selection of resource materials</td>
</tr>
</tbody>
</table>
Just a quick glance at the preceeding chart shows quite graphic- 
ally the variation in characteristics that each group felt were important 
when they drafted their respective checklists. It would appear that in 
some systems, qualifying for top merit increases could be far more diffi-
cult than in others. After inspecting a number of these evaluation devi-
ces in checklist form many of the district's educators voiced comments 
similar to the following: It shows that the teaching profession must 
display an excellence of character that matches if not surpasses the 
traits of most other professional groups. This isn't unexpected though, 
since most parents want only the best for their youngsters. In comparing 
ourselves to the checklists we would all demonstrate their traits some 
of the time, but it would be a rare person indeed who could maintain 
competence in all of the areas all of the time. And, surely, if one of 
us did continuously exhibit such quality, he might, ironically, find 
himself high in the educational hierarchy far from the classroom and the 
children who would benefit from his many fine traits.

Obviously there is more to know about this form of rating than 
just the traits being assessed. The number of evaluators and their frame 
of reference also enters into this thinking. For, when utilizing a check-
sheet as the primary means of teacher evaluation, the evaluator(s) report 
not on what has actually transpired; but only his evaluation of what he 
has seen and heard.¹

¹. New England School Development Council, Teacher Competence and Its 
Relation to Salary, 1956, p 91.
Still another element enters this checksheet picture. It is the halo effect facing all raters. For instance, an appraiser, convinced that a teacher is worthy of a merit increase, will shade his checklist findings slightly higher. He may subconsciously "see" the faculty member performing better and will therefore check the box which conforms to these inner thoughts.
To overcome such problems, most school systems base their teacher evaluations on more than one investigation technique, on the reports of several competent evaluators and, almost always, on more than one visit to the classroom during the school year.

**ALTERNATIVES TO A CHECKLIST EVALUATION**

Further investigation techniques make use of information not specifically covered by checklist rating instruments. A number of these assessment approaches may be used in combination with a checklist or in lieu of it. Here is a partial list of such alternate areas for determining a teacher's performance. The items were supplied by both teachers and administrators from this area.¹ They include:

1. Reactions parents give to teachers and their teaching...
2. Types and number of professional activities and groups a teacher supports...
3. Opinions of other school officials who have been associated with the teachers and their teaching...
4. Recognition of a teacher's advanced study and additional professional preparation...
5. Examination of the teaching taking place in a school's total program by such agencies as the Eastern States Association or the Middle States Association of Colleges and Secondary Schools...

¹. Report of an Institute, The University of Rochester, conducted July 14-17, 1959 op. cit. p. 25.
6. Use of teacher self-evaluation through form or interview,
   See appendix # K ...

7. Discussion leadership of curricular and instructional problems
   at grade level and departmental meetings...

8. Measuring of the general student progress through
   standardized tests over a period of three to five years...

9. Acknowledgment of the evidence of a teacher's quality
   as shown by the material accumulated in a teacher's file...

1. This ninth technique, involving a carefully kept cumulative personnel
   record system, is highly recommended by W. C. Reavis and D. H. Cooper
   in their Supplementary Educational Monograph No. 59, 1945, entitled
   "Evaluation of Teacher Merit in City School Systems".
CHAPTER IV  MERIT: TO WHAT DEGREE?

Just as there are many roads which converge all at Rome, so are there numerous paths a school district may follow in formulating a plan which centers on merit evaluation. The complexions of these programs are as varied as the systems which have adopted them. The reason for this variation may often be related to one or more of three major considerations: policy, budget, or enthusiasm. Such circumstances have resulted in the implementation of merit in many degrees. Faculties are experiencing it formally, semi-formally, and informally. In addition, merit increases may be awarded at the first salary step, at any subsequent step, or in a total step plan. To clearly comprehend these merit approaches let us survey a few varieties now in effect in New York State.

BRIGHTON #1

The Brighton District One School System provides an example of merit application as it is employed by several area schools. Devised by an elected committee of teachers with administrative assistance, their formal merit plan begins at step sixteen and continues to the twenty-second step of a twenty-four step schedule. Those teachers who earn the rating of "Satisfactory Plus" are then awarded increments which, when all seven steps are achieved, will total $11,400.

This evaluation for merit is done by a reviewing committee of five teachers plus the Administration. A list of the candidates who have qualified is then submitted to the School Board by the Superintendent. At this point final decisions are made.

The criteria used for evaluating Brighton teachers, (See Exhibit H) are prefaced by this philosophy:
"Any teaching position in which the teacher is fully responsible for the instruction of a group of children is as important as any other such position. Even though the importance of positions is equal, the quality of teaching varies considerably from one teacher to another. While most scales, check lists, and other measures for rating teachers are of questionable validity, there is generally considerable unanimity of judgment among skilled observers in the evaluation of teaching. Likewise, competent teachers are able to evaluate the quality of teaching with considerable unanimity."

WEST IRONDEQUOIT

This neighboring district has merit in effect after the tenth year of service. At this stage in a teacher's career, he may be considered for one of six steps on the merit scale. Recommendations for such incentive pay are made by the administrative staff. The Board of Education is then responsible for the final decision. The salary for a teacher achieving the top merit category is $9600.

CANANDAIGUA

In 1957 a salary plan based upon the merit rating system was first inaugurated by the Board of Education for the city of Canandaigua. In 1960 the program was revised and is now based on salary scales tied to merit ratings on a percentage basis. These ratings, drawn up by the Finance Committee of the Board of Education, are assigned the following values:

<table>
<thead>
<tr>
<th>Value</th>
<th>Category</th>
<th>Merit Rating</th>
<th>Annual Salary Increment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Poor</td>
<td>Below 2.0</td>
<td>None unless mandated</td>
</tr>
<tr>
<td>2</td>
<td>Mediocre</td>
<td>2.0 to 4.1</td>
<td>3%</td>
</tr>
<tr>
<td>3</td>
<td>Average</td>
<td>4.2 to 5.2</td>
<td>4%</td>
</tr>
<tr>
<td>4</td>
<td>Excellent</td>
<td>5.3 to 6.0</td>
<td>6%</td>
</tr>
<tr>
<td>5</td>
<td>Outstanding</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Starting in 1947, the Ithaca merit program is perhaps the most discussed in our state. The program is decidedly subjective in its plan of evaluation. Both the superintendent and the teachers who formulated the program believe that complete objectivity in teacher evaluation is impossible.

The plan of evaluation is completed annually by the building principal for his teachers. His rating includes the teacher's personal service record, the supervisors' or consultants' reviews, and his own supervisory observations. The form used has two major headings: "Direct Services to Pupils" which includes teaching ability, classroom management, and contribution of teacher to school program and "Teacher Qualities and Growth". This second heading includes the areas of personal qualities and professional growth. Based on these criteria, ratings are given from one down to five in degree of excellence.
CHAPTER V  THE OPERATION OF THE MERIT PLAN AT RUSH-HENRIETTA

As indicated in chapter one, the merit program came about for two reasons. One: the desire by the Board of Education for a method of rewarding the district's superior teachers. The other: the desire by the faculty for some type of program that would increase in-service opportunities and also provide salary increases, at least for some, beyond the barrier of the automatic salary schedule.

To place the program into action some method of teacher evaluation was necessary. For this program of appraisal two problems had to be overcome. They were the selection of (1) a rating device and (2) the determination of how the evaluators would carry out their responsibilities.

THE EVALUATION FORMS TO BE USED

After many hours of discussion and examination the Merit Committee adopted a commercial rating form entitled simply: Teacher Evaluation Report. This rating sheet is further coded "Form B-91" by its source, Bardeen's Incorporated, a school supply house located in Syracuse, New York. Where this distributor obtained the form is not known.

Regardless of its origin however, the form does seem to be comprehensive in its checklist items. Four major categories are outlined with at least eight subpoints listed under each category. These thirty-four behavioral outcomes may be reviewed by referring to the chart of checklist teacher characteristics on pages 32 and 33.

The next hurdle was that of "weighing" or placing a numerical value on each teacher characteristic to be rated. This task was a simple one

1. See appendix G
since the card already had boxes opposite each observable characteristic.

There are five such boxes, each under one of five possible classification.

Thus:

<table>
<thead>
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<th>OUTSTANDING</th>
<th>ABOVE AVERAGE</th>
<th>AVERAGE</th>
<th>BELOW AVERAGE</th>
<th>POOR</th>
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The Merit Committee weighted each classification in this manner:

As a result of this system the number of points a teacher receives will determine the category into which they shall fall. These categories are as follows:

Outstanding: 119 - 136 points
Above Average: 85 - 118 points
Average: 51 - 84 points
Below Average: 17 - 50 points
Poor: 0 - 16 points

Another form utilized is a mimeographed sheet drawn up by the Director of Elementary Education. The purpose of this form is to provide a place to record what was observed on classroom visits. The five areas considered on this anecdotal record are:

1. Classroom Atmosphere
2. Evidences of Good Teaching
3. Evidences of Areas for Improvement
4. General Lesson Observed
5. General Feeling of Observer

The third rating device is a relatively elaborate booklet called The Teaching Evaluation Record written by Dwight E. Beecher, Research Coordinator for the Buffalo Public Schools, this instrument was based on

1. See Appendix L
2. See Appendix M
criteria set forth by schools throughout New York State. The device serves a dual purpose: that of "providing a comprehensive guide for diagnosis and constructive supervision." and that of providing "reliable ratings of teaching effectiveness."

The most significant difference between this rating form and Bardeen's evaluation report is the difference in emphasis. This booklet emphasizes only those characteristics which can be observed within the classroom, and those which contribute to competent teaching and effective learning. It does not consider the personal characteristics of a teacher nor their behavior outside the school room.

A further examination of this booklet shows that it contains a total of thirty-two characteristics. Each one is fully explained and is broad enough to cover any teaching situation either in a self contained classroom, a departmentalized plan, or a special subject area such as gym or music. To illustrate the applicability of this rating form it might be desirable to glance at several of the characteristics covered in it. The following items show this range:

1. The teacher is fair and impartial.

2. The teacher's behavior is consistently unbiased.

Sample Evidence

Shows no favoritism or partiality; praise and criticism are based on fact; all criticism constructive; no pets; appraisal of pupils fair and reliable; no excessive criticism of individual pupils; maintains the confidence of children.

3. Contributions and efforts of individual pupils are given recognition.

Teacher shows respect for pupil opinion and suggestions.
Sample Evidences

Expresses interest and gives appropriate commendation to pupil effort even if small. Attention is given to individual comments and problems."

"26. Teacher employs a variety of approaches in presenting new materials.

Teacher shows adaptability and broad understanding of technics in his presentation of new materials.

Sample Evidences

Teacher uses many illustrations, utilizes suggestions from pupils as to method and procedures; changes method quickly when it is obvious that the method being used is not effective; encourages pupils to try out several solutions; teacher and pupils discuss the relative merits of the various solutions."

In connection with these above criteria, Beecher suggests that evaluators use a four-point scale preceded by a zero. The purpose of the zero is to show that the rater had no opportunity to observe that particular item being demonstrated. When final tallies are made the zero items are disregarded and consequently do not harm the teacher's total rating score. This eliminates the subjective judgment often created by checklist instruments in which all items must be scored regardless of whether or not they were observed. The Bardeen form suffers partially from this factor.

THE EVALUATOR'S RESPONSIBILITIES

The responsibilities for actually using the three evaluation devices to gather information were given to the administration. Here is how these duties are accomplished. During the school year each administrator at the elementary level makes a number of observations. These building principals usually carry out a minimum of one scheduled visit per teacher during the school year. As part of this formal visit the principal utilizes the mimeographed sheet drawn up by Mr. Popen. On this form he records what he has seen during his observation or immediately after it. A conference between the teacher and the principal soon follows on the same day if possible.

Other observations are undertaken by the building principal, but these are informal visits required by the Director of Elementary Education. In performing these visits, the principals are given the alternative of turning in two visitation reports per week or sixty such observations by the completion of the school year. Again the mimeographed sheet is the form utilized.

The next phase of teacher evaluation is the responsibility of the Director of Elementary Education. The Merit Committee felt that for a more accurate assessment of teacher competence, the estimate of more than one administrator was necessary. For this reason Mr. Popen also assists in teacher evaluation. In most of this rating he employs The Teaching Evaluation Record. After a personal, scheduled visit to a classroom he places the date of his observation above the appropriate box on the four-point scale. Each teacher is thus systematically rated. This evaluation
is continued annually and in a period of years it provides a definite
profile of an instructor. Both improvement, and the need for improvement
can be graphically noted. These data are extremely valuable when yearly
recommendations for merit are required or when tenure appointments are
made.

The last stages of this assessment operation focus on the Bardeen
Teacher Evaluation Report. Mr. Popen is again responsible for completing
this checklist although he does it after agreeing with the building principal. In filling it out, he bases his scoring on the information furnished
by both the Beecher booklet and the building principal's observation
reports. Thus, the rating resulting from the Bardeen form provides the
final answer to who will be considered as a candidate for a merit boost.

The names of these teachers who have attained the "outstanding"
category are then submitted to the Board of Education. At this time the
Board makes the ultimate decision. Presently no limit has been set on the
number of teachers to receive the meritorious salary advance. All must
have completed their fourth step however. Therefore, there is every
reason to believe that all the candidates selected will gain approval.

The merit increment for this year has been set at one hundred dollars. This money is paid in June at the completion of the school year.
At this time the recipients are announced through congratulatory letters
signed by the president of the Board of Education.
This, then, is the program of merit as it is presently administered at Rush-Henrietta. The writer of this account hopes it has been both informative and thought provoking. The program is still in its infancy. The need for improvement is already evident. Nonetheless, the first steps have been taken and now both the Administration and staff must share the responsibility for developing the program into a full and successful maturity.
CHAPTER VI  AN EVALUATION OF THE RUSH-HENRIETTA MERIT SYSTEM

The writer has experienced Rush-Henrietta's merit program for an entire school year. This period has proved to be invaluable in providing first hand information about the operation of a plan for selecting and awarding superior teachers. It is understandable that this initial year has left the program with the need for several improvements.

The following recommendations, the writer feels, are both urgent and necessary for a more effective program in the future:

1. A basic salary schedule equal to those of surrounding school districts.

2. A merit increase of at least one salary step if the payment is and increment or twice this amount if merit is to be a bonus. At Rush-Henrietta the payment of $100 is not sufficient to accomplish any program goal save the mere recognition of a superior teacher. While it is true that this meager figure is a step above the "verbal bouquets" of the past years, it is still inadequate when weighed against the program's goals and the energies used in administering it.

3. An "opportunity" program paralleling the merit plan. Such an approach would provide a variety of opportunities for all teachers to pursue as a way of increasing their professional competence.

4. The use of an evaluation device such as the Beecher form which places the greatest stress on those characteristics of teachers which will actually increase the quality of the student's education.
5. The employment of an educator, not an evaluator, to whom teachers could turn for advice concerning improvement. This is necessary since many teachers find it extremely difficult to seek aid from someone in a rating position who might inadvertently penalize them for this action.

6. Merit in monetary form only after the third year of teaching experience. While some may feel that it is admirable that beginning staff members strive for merit honors, the concept needs reconsidering. Instead of encouraging beginning teachers to race swiftly down the broad road to total professional competence, would it not be better to direct their initial energy and enthusiasm on a more moderate path? By awarding merit at a later time, the fourth year for instance, the beginning teachers could spend their first three years in bringing about firm classroom control, developing a sound knowledge of the curriculum, and adjusting gracefully to the system.

7. A flexible program backed by a large percentage of interested and informed faculty and administrative members. The attitudes of these educators should be those of sincerity and mutual confidence.

8. The continuous evaluation of the program seeking ways to make it more effective plus a close examination of the plan's effect on teacher's competence and retention.
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BOOKS


PERIODICALS


MISCELLANEOUS

Broadening the Concept of Merit in Teaching Through The Assessment and Improvement of Teacher Performance, A Report of an Institute for School Administrators and School Board Members, The University of Rochester, Conducted July 14-17, 1959.


NEWS ITEM

Pittsford's Salary Notice
Pittsford Holds Line
On Teacher Base Pay

By JOHN STREET

The Board of Education of Pittsford Central School has decided to keep its present minimum teacher salary schedule for the 1960-61 school year.

The minimum schedule provides $2,820 for a new teacher with four years of college.

Top salary on the minimum schedule is $6,000 for a teacher with a year of graduate training and ten years of the minimum schedule.

But Pittsford, which operates on a month basis, pays most of its teachers in excess of the minimum schedule.

The schedule provides for annual pay increases of $200 every year for the first five years and the increment is $350.

However, the actual average for next year will be about $2500, according to Superintendent Earl H. Bettinger.

He said the average salary will be about $2700, as compared to $2450 this year.

THE TOTAL budget appropriation for teacher salaries will rise from about $900,000 this year to about $1,150,000 next year, Bettinger said.

The increase is due partly to extra pay increases (about $250) and partly to salaries for an expected seven new teachers (about $2,000). Pittsford has 118 full-time and part-time teachers.

Bettinger said teachers are "rewarded for exceptional service" with extra pay at all levels of the salary schedule.

The teachers do not, however, get extra payments for additional duties such as coaching, class guidance, work as club director, he said.

Other starting steps on the minimum salary schedule are $2,400 for 4 years college plus 20 hours graduate work, $2,800 for 6 years college plus 30 hours graduate work and $3,400 for 8 years of training.

An additional $50 is given for each additional 6 hours of graduate work.

KOCHSTER TIMES UNION
Wed., Feb. 9, 1960

30
NEWS ITEM

Brighton #1's Salary
Choices
School Board Gives
Brighton 1 Teachers
Four Salary Choices

The Brighton 1 Board of Education last night offered its discontented teachers four salary choices, including an extra $200 raise if a two-year "freeze" were agreed to.

The school board would be asked to spend the money to raise the "poverty" and "advanced" teachers $200 a year for each year the pay raise would be $200 a year for each year, with the pay scale fixed at $200 for two years.

The board is ready to accept the teachers' choice without further discussion. The present salary scale for teachers, which is $1,200 a year, may be increased to $1,207 after teachers, board members and staff agree on the amount of the raise.

The teachers would receive a raise of $10 a month over the present, with an increase of $1,207 after the raise is increased to $1,207 after the raise is increased to $1,207 after the raise is increased to $1,207 after the raises.

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NEWS ITEM

East Rochester's Pay Plan
E. Rochester Adopts Teachers Pay Plan

A $10,000 teacher salary schedule that gives "first consideration" to length of service and amount of training has been adopted by East Rochester Board of Education.

The minimum starting salary for a teacher with four years of college education will remain at $2,000.

But for four years of college plus 15 hours of graduate work the starting salary will be increased $100 to $2,100.

For all additional hours the starting pay will increase $100 for each graduate hour up to $2,400 for 20 graduate hours, $2,600 for 40 graduate hours, and $2,800 for 60 graduate hours.

Supervising Principal Louis O. Oehmke said that next year "first consideration" in pay for outstanding service will be given to teachers teaching in the high school.

At a meeting on April 10, 1929, the Board of Education decided to adopt the plan that "first consideration" in pay for outstanding service should be given to teachers teaching in the high school.

ROCHESTER TIMES UNION (ROCHESTER, N.Y.)
NEWS ITEM

West Irondequoit's Salary Boost
Town Unit To Raise Teacher Pay
West Irondequoit
Aims 5% Boost
By Ronald Wynn
The West Irondequoit school board voted recently to make a salary increase of about 5% next year for the 2,000 district teachers.

The salary for a beginning teacher with a bachelor’s degree will be $24,000 for a 10-month school year, and the scale for a teacher with more than 10 years of experience in the top of the merit category will be $33,000.

The plan is to raise supplemental teachers. West Irondequoit teachers. The pay scale is designed with increased increments for the veteran teachers.

The school board also decided to fund the salary increases for one year jump in pay. The 5% consists of a $200 annual increase and an additional $200 capital on the existing pay schedule.

For a teacher moving from the ninth to tenth year of experience, the total increase will be $2,800 for an additional year’s experience and $3,200 in the form of a salary increase.

West Irondequoit also plans to increase teacher Emergency leaves through the first 10 years of teaching experience.

Each year is greater divided into eight categories. A teacher with a master’s degree makes $200 more a year than a teacher with a bachelor’s degree. A teacher with up to $200 higher for each 10 hours of graduate work in addition to a bachelor’s or master’s degree up to 20 hours.

Once a teacher has completed 150 hours of teaching. he may be notified for one of the steps in the merit scale. Communications for pay on the merit scale are handled by the administration. 
SALARY POLICIES FROM THE
RUSH-HENRIETTA BOARD OF
EDUCATION
The Board of Education in its continued study of staff relationships and salary programs finds that certain elements are necessary to support its policy of attracting, retaining, and developing a high quality teaching staff.

I. WORKING CONDITIONS

a. Desirable surroundings which create favorable atmosphere for practicing the teaching profession - modern buildings and facilities.

b. Good administration that observes, confers, and provides guidance for professional development of staff members.

c. Good type of community.

II. JOB OPPORTUNITIES

a. As growth in the district requires expansion of the school system, it shall be the policy of the Board to promote individuals from within the staff insofar as possible.

b. A system of evaluation of professional skills upon which to base all forms of advancement.

III. SALARY PROGRAM

a. A basic salary schedule which is commensurate with the surrounding districts.

b. A provision for salary increments based on additional hours of credit in working toward a masters or certification. This work must contribute directly to professional development in the particular field.

c. A provision for salary increments for outstanding performance as determined by the administration.

d. A provision for a below average salary increment for sub-standard performance as determined by the administration.
MECHANICS OF SALARY SCHEDULE POLICY

INCREMENTS

1. Normal increments from 1st and 2nd year will be one step. All years following normal annual increment will be 2 steps. The administration can recommend an additional step at hiring to particularly promising candidates.

2. Educational credit for each 10 hrs. through 30 would be 1 step. One step will be allowed for Masters credit. The administration can recommend that service credit be allowed for non-teaching experience.

3. Existing staff can gain one or additional steps depending upon administrative evaluation during their teaching career.
   a. The Board of Education, in awarding a step for outstanding teaching performance, offers an improved position on this salary schedule which will benefit the teacher throughout his teaching career.
   b. Sub-standard teaching performance as determined by the administration may result in the advance on the schedule of less than the normal annual increment.
   c. Staff members can advance beyond the maximum limits defined by their education by the number of merit steps earned throughout their teaching career.

MILITARY SERVICE STEP - ACTIVE

All teachers who have had 1 year or more active military service will be credited with 2 steps on the salary schedule. This service award was issued to take effect in September 1958. All present staff members have been awarded this credit and all new teachers will receive it when hired.

HIRING

1. The normal hiring step for inexperienced teachers with bachelors degree will be $4300. Those with advanced educational credit will be placed on correct step as designated by #2 above.

2. Credit for past experience will be calculated on the following basis:
   One step for one year's service.
   Two steps each for a maximum of four additional years and
   One step for each additional year to a maximum of 15 steps

The administration can recommend that service credit be allowed for non-teaching experience.
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BARDEEN'S TEACHER EVALUATION

REPORT
## TEACHER EVALUATION REPORT

**File No. 2.1**

**Recommendation:**

1. **TEACHING EFFICIENCY—Procedures**
   a. Planning and preparation of work  
      (Daily; long term)
   b. Classroom management  
      (Housekeeping — orderliness, arrangement and care of materials, attractiveness of room; Control of class—type, degree; adequate attention to attendance of pupils and attendance records)
   c. Attention to course of study  
      (Follows course of study; modifies when necessary to meet needs of class)
   d. Stimulation of pupil interest  
      (Class is attentive, participates with enthusiasm)
   e. Attention to individual differences  
      (Knows pupils; analyzes needs; applies remedial measures)
   f. Economical use of pupil time  
      (Avoids waste of own and pupils' time; improves habits of study)
   g. Applies principles of educational psychology  
      (Clear and reasonable assignments. Utilizes pupils' questions, leads and contributions; makes work meaningful; keeps learnings alive by recall)
   h. Use of teaching aids and devices

2. **TEACHING EFFICIENCY—Results**
   (in terms of pupil development)
   a. Pupils show growth in self-control  
      (—in classroom, on playground, about building; self-respect)
   b. Teacher stimulates pupil cooperation  
      (with teacher, with other pupils; willingness to carry proper share of load)
   c. Pupils are courteous  
      (concern for rights, welfare of others; tolerance)
   d. Teacher inspires loyalty  
      (to principles and ideals, classmates or school; patriotism)
   e. Study habits of pupils show improvement  
      (Efficient use of time; intelligent selection of materials; perseverance)
   f. Pupils are developing ability to think  
      (clearly, accurately; make decisions)
   g. Pupils have achieved in subject matter  
      (Acquittal; retention, application)
   h. Intellectual curiosity of pupils aroused  
      (Power and desire to observe; eagerness to learn)

## GENERAL RATING

3. **PROFESSIONAL CHARACTERISTICS**
   a. Adequacy of Preparation  
      (Learned; well prepared in own subject; accepted with other 

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**Form B-91**

**Name:**

**Subj. or Gr.:**

**School:**

**Temp. Addr.:**

**Address (Permanent):**

**Note:** Place a single X in space opposite each lettered classification, which most nearly indicates your opinion.
## Score Sheet for Evaluating Teachers

**Teachers:** Brighton #1
| Name of Teacher: ___________________________ | School: ___________ |

**The Teaching-Learning Situation**

A. **Scholarship**
   - Knowledge of subject matter, maintaining interest in learning, develops pride of achievement in pupils.  

B. **Planning**
   - Clear and definite goals, helps pupils see objectives.  

C. **Flexibility**
   - Varied methods to meet individual differences, accepts all children, etc.  

D. **Objectivity**
   - Accepts and credit constructive criticism, sees his own role in proper perspective.  

E. **Evaluation**
   - Uses tests to diagnose difficulties and improve instruction.  

**Personal and Professional Qualities**

A. **Leadership**
   - Ability to organize groups; participates in committee work, creates better school morale.  

B. **Creativity or Imagination**
   - Encourages creativity and originality, is ever seeking new approaches to learning problems.  

C. **Enthusiasm**
   - Enjoys teaching, supports professional organizations, makes his enthusiasm for learning contagious.  

D. **Initiative**
   - Willing to accept new ideas, challenges all activity levels, points up areas that need study.  

E. **Integrity**
   - Personal readiness under strain, constantly evaluates own effectiveness.
A.

1. Communication
   Interpret school program; works well with parents.

2. Understanding of children
   Understands human growth and development; possesses compassion and wisdom.

C.

1. Judgment
   Understands human nature—love, faith, and works in logical manner.

D. Considerations
   Shows thoughtful kindness, awareness of intellectual courtesy, composes all points of view.

2. Integrity
   Broad-minded, well-balanced; free from bias and prejudice, sympathetic understanding of human weaknesses and strengths.

Formal Score:

Part I
Part II
Part III

Total

Date __________________ Signature __________________
TEACHER EVALUATION FORM

FOR MERIT: Pittsford
TEACHER EVALUATION FORM

Class __________________ Date __________ Supervised __________

Col. __________________ (R.M.)

Personal qualities

(Vigor, neatness, poise, initiative, patience, etc.)

Aesthetics

(Toward school and students; considers each student as individual, understands child growth and student problems, possesses sense of humor, exercises tact and discretion.)

Subject Matter

(Thorough knowledge of material taught, clear explanations, assignments explained verbally.)

Classroom control

(Acceptable pupil behavior without frequent reprimands; good classroom atmosphere, encourages pupil responsibility and self-control.)

Evidence of good planning and organization

(Sets up definite goals and objectives, plans work adequately, establishes routine for maximum efficiency of class time.)

Presentation

(Skill in teaching technique, provides for individual differences, sufficient repetition, flexible program, uses student time efficiently, lessons are interesting and worthwhile.)

Materials

(Uses wide selection of resource materials, makes good use of bulletin boards, films, slides, movies, library and other instructional aids.)

Evaluation

(Measures pupils fairly and adequately, encourages high standards, judges on thorough work done on time.)

Response of students

(No dull, deadly lessons; inspires eager response from students, senses changing interests of group, encourages pupil effort.)

Total score divided by items checked equals rating.

Superior... 4(8.5-9)
Excellent... 3(7.5-8)
Good... 2(6.5-7)
Fair... 1(5.5-1.5)

Personal qualities

(Vigor, neatness, poise, initiative, patience, etc.)

Aesthetics

(Toward school and students; considers each student as individual, understands child growth and student problems, possesses sense of humor, exercises tact and discretion.)

Subject Matter

(Thorough knowledge of material taught, clear explanations, assignments explained verbally.)

Classroom control

(Acceptable pupil behavior without frequent reprimands; good classroom atmosphere, encourages pupil responsibility and self-control.)

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Evaluation

(Measures pupils fairly and adequately, encourages high standards, judges on thorough work done on time.)

Response of students

(No dull, deadly lessons; inspires eager response from students, senses changing interests of group, encourages pupil effort.)

(Comments and other pertinent information on reverse side)
EARLY RUSH-HENRIETTA MERIT

RATING OBJECTIVES
PUSH-PERMUTTA CENTRAL SCHOOL

2. Rules for Promotional Increments

(These are still under study. Final results will be issued. Some of these will be used and some
will be cancelled)

Teacher Group

A. Professional - Objective evidence includes academic and professional training and experience beyond the degree upon which the salary is based.

Subjective evidence includes the demonstration of increased effectiveness in pupil relations or inservice to the school or community.

B. Personal - Objective evidence includes varied work experience, travel, and hobbies, which contribute to the knowledge and growth of the individual teacher.

Subjective evidence includes the application of such knowledge and growth to the school or community.

Personal Requisites

A. Health - Physical and Mental

1. Physical vigor and vitality and effective use of the voice in communicating desirable ideas, attitudes, feelings, etc.

2. Adaptability - Ability to make necessary adjustments - open-mindedness.

3. Sociability and consideration - Ability to get along with fellow-workers, cheerfulness, friendliness, sympathy, understanding, patience, tolerance, helpfulness, etc.

4. Emotionally - Stability and balance characterizing the well-adjusted individual - poise - manner.

F. Professional Attitudes

1. Readiness and ability to work with professional groups - membership or participation in appropriate professional groups.

2. General sense of responsibility - For regularity of attendance, accuracy and promptness of reports, consideration for the objectives and the general and specific plans of fellow-workers.

3. Initiative - Readiness for effective action - capacity for leadership, creativeness, resourcefulness, initiative to undertake tasks outside the prescribed routine if the occasion arises.

4. Judgment - Wisdom in selection of learning experiences, teaching techniques, materials of instruction, standards of growth, handling of the individual child, discretion in dealing with others, etc., foresight - prudence - common sense.
5. Ethical Values - Loyalty, cooperation, courtesy and responsibility.

C. Attitudes Towards Pupils

1. Contributions to wholesome pupil growth and development.
   a. Evidence of desirable pupil attitudes, understandings, behavior.

2. Understanding and consideration of each pupil as an individual.
   a. Teacher ascertains needs and capacities of the individual, helps him in appropriate learning experiences -- interest in the educational life plans of the pupil.

3. Assistance or interest in the extra-curricular, recreational, and social activities of pupils.

III Work Habits

A. General

1. Punctuality and regularity.
2. Efficiency in use of own time.
3. Efficiency in use of pupils' time.
4. Perseverance and ingenuity in overcoming difficulties.
5. Applied ability to organize.
6. Applied ability to coordinate, correlate and adapt programs.

B. Application of Educational Philosophy

1. Adequate and appropriate goals and objectives in meeting school, community and pupil needs.
2. Flexibility in programs to allow for individual differences.
3. Respect for and adherence to accepted principles of learning and teaching.
4. Appropriate use of measuring devices.
5. Knowledge and application of child psychology to the teaching situation.
6. Direction of the learning activities toward the objectives of accepted educational philosophy.
C. Teaching Skills

1. Teaching objectives consistent with learning experiences and activities.

2. Activities well chosen:
   a. Appropriate to objectives, to level of development of age groups, to flexibility necessary, to limited aspects of the learning-teaching situation, to local school program, to needs and resources of pupils and community.

3. Effective use of instructional aids.
   a. Books, radio-visual aids, pupil prepared materials, etc.

4. Effective use of source materials - - community resources, skills already a part of pupils previous experiences.

5. Classroom management and control:
   a. Housekeeping, pupil-teacher relationship, interest, making of assignments, discussion, pupil-participation, etc.


7. Plan for day's or unit's work - Objective evidence includes a written plan for a specific area or timetable of work or curriculum. Subjective evidence includes the application and adherence of the plan.

IV Community Service

A. Member of a democracy

1. Belief in the democratic way
   a. Desirable ambitions, motivations, and interests.

2. Furthering of the democratic ideals through practice and example.
   a. Exercising duties of a good citizen, etc.
   b. Inculcation of the democratic ideal through curriculum applications.

3. Interest and support of local school or community.
   a. Social, political, recreational development.
TEACHERS' PERSONAL EVALUATION FORM

Gillette School

Rush-Henrietta
<table>
<thead>
<tr>
<th>Subject</th>
<th>Superior</th>
<th>Above Average</th>
<th>Average</th>
<th>Below Average</th>
<th>Poor</th>
</tr>
</thead>
</table>

This report is due back to the principal teacher.
**Personal Evaluation Sheet page 2**

<table>
<thead>
<tr>
<th></th>
<th>SUPERIOR</th>
<th>ABOVE AVERAGE</th>
<th>AVERAGE</th>
<th>BELOW AVERAGE</th>
<th>POOR</th>
</tr>
</thead>
<tbody>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Rs and Methods of Analysis:**
- In work
- Observation
- Children's work

**Room Control:**

**Attitudes:**
- Personal traits
- Techniques

**Skill:**
- Object better
- Interacts with children
- Interacts with peers

**Dance:**

**Ting Potential:**

---
TEACHER EVALUATION SHEET

Drawn up by Edward J. Popen,

Director of Elementary Education, Rush-Henrietta
2. Evidences of Good Teaching:

Evidences of Areas for Improvement:

General Lesson Observed:

General Feeling of Observer:

Recommendations:
THE TEACHING EVALUATION RECORD

Dwight E. Beecher
THE TEACHING EVALUATION RECORD

by

DWIGHT E. BEECHER
Coordinator of Research
Buffalo, New York, Public Schools

EDUCATORS PUBLISHING COMPANY
THE TEACHING EVALUATION RECORD

Prepared by DWIGHT E. BEECHER
Coordinator of Research, Buffalo, New York, Public Schools

The Teaching Evaluation Record is designed to serve a dual purpose:
(1) To provide a comprehensive guide for diagnosis and constructive supervision
(2) To make possible reliable ratings of teaching effectiveness

This rating scale is based on a very broad consensus of experienced educators as to the objectives of education, and as to what practices and behaviors tend to result in the achievement of these objectives. It is applicable to teachers of all grades and subject areas.

The development of this instrument has had the benefit of active participation by representatives of ten teachers' colleges, and experimental use of items in an evaluation project involving over 800 teachers. Following extensive experimental work, complete item analysis was made, followed by further refinement and selection of individual items.

The present instrument is believed to include all the criterions of effective teaching commonly indicated in lists of cardinal objectives and pupil needs. In the development of this instrument consideration has also been given to criterions of effective teaching selected by over 300 local committees in school systems throughout New York State, and to over 400 research studies.

It is believed that in addition to statistical evidence apparent from experimental use, The Teaching Evaluation Record has basic validity in that every item is directly related to pupils and to widely accepted objectives for their achievement. Every item is observable and therefore provides an objective basis for evaluation. Each item is specific and subject to a minimum of varied interpretations. The few overlapping items are intentional and have been carefully devised to provide an internal weighting of more important factors without recourse to mathematical weighting of scores.

In brief, The Teaching Evaluation Record is believed to provide the most comprehensive, objective, reliable and valid device yet developed for diagnosis and appraisal of teaching effectiveness. It will serve as a valuable guide to both teachers and supervisors in diagnosing strengths and weaknesses for the purpose of improving instruction, and provide a comprehensive and objective record for use in evaluation and rating.

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GENERAL SUGGESTIONS
for the Evaluation of Teaching

The Purpose of Evaluation

Evaluation of the effectiveness of teaching is a basic, if not the most important function of the supervisor. Without very exact knowledge as to the strengths and weaknesses of existing practices, supervisory guidance cannot operate to bring about a maximum of improvement.

The judgments of administrators and supervisors as to the relative effectiveness of different teachers is an outcome of these broader purposes of evaluation rather than an end in itself. At the same time, if the best teachers are to be selected, given tenure, and otherwise recognized, it is obvious that a sound basis must be established for determining which persons are the best teachers.

Objectivity Is Basic to Good Evaluation

Criticisms of procedures and devices used in rating teachers focus very largely on subjectivity. Most rating scales are not only limited in content, but call for a record of opinion only. The Teaching Evaluation Record is so constructed as to require actual observation of those practices, behaviors and conditions which give concrete evidence of the quality of teaching. Subjective opinion, is, therefore, reduced to a minimum, and observed, objective evidence becomes the basis for the evaluation. The old maxim, “Seeing is believing” may be here stated as a basic principle: to be truly objective, a thing must be observable.

In administering The Teaching Evaluation Record it is important that the observer recognize the necessity for recording only what he observes. Many sample evidences are given to clarify the meaning of the items. Many similar evidences may be observed which are fully as creditable as those listed.

Observation Time

A great deal of experimentation has been done in an effort to determine the amount of observation time necessary for an adequate evaluation of the effectiveness of a teacher. The recommendation of two full half days early in the school year and an additional two full half days in the spring is made in the directions. This recommendation as to the minimum observation time normally required is based on the consensus of experienced supervisors from ten teacher training colleges. This time allotment should be considered a minimum rather than a maximum. Experienced supervisors will recognize the importance of staying with the teacher for at least full half-day periods if a variety of teaching and the handling of children in the various aspects of their daily programs is to be observed. Observation time should be sufficient to rate most items. There is evidence, however, that even 20 to 25 items, accurately rated, will give reliable scores.

Familiarity with the Items

Use of the Record will bring greatest values for both diagnostic and rating purposes if the observer is thoroughly familiar with the items.
Ideally, the items would be memorized. In any case, familiarity must be sufficient that the observer will be alert to all types of evidence included, even though they are demonstrated in rapid succession.

Supporting Records

Some note taking is probably essential in administering so comprehensive a scale, although the practice is frowned upon by many authorities on supervision. If teachers know they are to have a post-supervisory conference at which time they will learn the content of the notes, this procedure will be less frustrating. In any case, careful anecdotal records should be filed in the teacher's individual folder as soon as possible after each observation.

It should be noted that some evidences of effective teaching included in the Record may be observed outside the classroom. Just as our concept of the curriculum today includes all the school-sponsored activities in which a pupil engages, so must the effectiveness of the teacher be judged in many situations in addition to formal class work. Whenever reliable evidence of effective teaching comes to the attention of the supervisor or administrator responsible for evaluation, a brief, factual anecdote should be prepared and placed in the teacher's folder. These anecdotes will supplement classroom observations and may be used in completing the Record. This will assure a more complete coverage of the teacher's work and effectiveness than would the classroom observations alone.

The Record as a Teacher's Guide

Evaluation, if it is to serve both a guidance and a rating function, must be a cooperative process. This means that teachers should have an opportunity to familiarize themselves with the items in the Record. This will serve the dual purpose of keeping before the teachers the objectives they are expected to achieve, and will provide an excellent basis for self-evaluation. This procedure also has a quality of fairness which will tend to foster good relationships between supervisor and teacher. The old idea that the teacher must not see the rating device becomes irrelevant when the device is made truly comprehensive. As a matter of fact, the thing to be most desired is that teachers will be constantly striving to attain a high degree of effectiveness on all items. The Record thereby becomes a guide and challenge as well as an instrument for diagnosis and rating.

Recognition of Limitations in Opportunity

No teacher can be expected to demonstrate effectiveness in achievement of all goals set for him by this Record or any other comprehensive listing of objectives. Much less can he be expected to produce evidence on all items within the observation periods. For this reason The Teaching Evaluation Record makes provision, through the scoring system, for rating only those items which there has been opportunity for the teacher to demonstrate.

Norms

Strictly speaking, exact statistical norms are not available for this edition of the Record, due to minor revisions and refinements. For prac-
tical purposes, however, a median of 55 to 60 is approximate. Beginning teachers may be expected to fall about ten points below this. A score above 80 may be considered as indicating a superior rating, based on results from the experimental edition of the Record.

Multiple Evaluations

Where possible, independent observations and ratings should be made by two or more competent persons. The composite ratings of two or more people materially increase the reliability of results from any such evaluation procedure. Again, morale is a factor, in that teachers will more willingly accept the joint ratings of two or more persons if a question of fair appraisal develops.

General Applicability

The Record has been constructed to cover all areas and grade-levels of teaching, thus providing uniformity in the evaluation program and a basis for comparison where merit increments are given. This is possible because the objectives of education, based, in turn, on the needs of children, are common to all types of teaching. A study of the items of the Record in terms of any basic list of such objectives or pupil needs will illustrate both its general application and its comprehensiveness.

Obviously, the actual practices and conditions observed and the learning content being presented will vary from teacher to teacher. Use of the Record in evaluation of virtually every type of teaching common to the public schools has demonstrated that all items are applicable and their achievement is restricted only by local limitations in facilities and policy or by the teacher's own limitations.

DIRECTIONS FOR USE

All items in this evaluation record are to be scored on the basis of objective evidence obtained by the supervisor making the evaluation. Two full half-day visits to the classroom, spaced at least one week apart, should be considered the absolute minimum in observation time. At least one early fall, and one late spring evaluation should be made, with a minimum of two half-day visits to support each evaluation.

The scoring method used in the evaluation record involves the following principles: (1) Evaluations should be based on actual observed evidence only. (2) Performance ratings should be in terms of opportunity to perform.

Any rating device designed to record widely varying activities, such as will be observed in teaching, must provide flexibility with respect to teaching opportunities within the observation periods. It is entirely unrealistic to set up a comprehensive listing of all the practices, behaviors, and achievements of teachers and expect to observe their demonstration within the limited observation time available. The four-point scale used is, therefore, preceded by a zero (0) point which is checked only to indicate
that there was no opportunity for the item to be demonstrated during the
observation period. The zero items are disregarded in the final scoring
just as optional or surplus items may be on a pupil's test.

Except for indicating the zero or "absent" items, as explained above,
the method of scoring is in the form of a four-point scale to be scored as
follows:

- Check in box "4" if practice or condition involves all, or nearly all, pupils and is consistent.
- Check in box "3" if the practice or condition involves most of the pupils in the group and few opportunities are missed.
- Check in box "2" if practice or condition is present, involves some pupils but falls short of involving most pupils and of being consistent.
- Check in box "1" if practice or condition is present but inconsistent, reaches few pupils.

**Final Rating**

The total score is obtained as follows:

a. Subtract the number of items marked zero from 32 (the total possible items) and multiply the remainder by 4. This gives the total possible score for the individual teacher concerned.

b. Add the ratings of the individual items.

c. The total of individual items "b" divided by the total possible score "a" is the final rating.

**Example**

Items checked at zero (no opportunity to observe) = 4
32 minus 4 = 28 (items to be considered)
28 x 4 = 112 (highest possible score)
Sum of ratings, i.e. ones, twos, three and fours = 84
84 ÷ 112 = .75 → The final rating is .75.

**Sample Evidences**

The "evidences" listed must be considered as samples only. As such, they will serve to define the items and suggest the types of condition or practice which will support this rating. Supervisors may wish to work out with their teachers much more lengthy lists of evidences which will serve both as a stimulus to teaching and a guide to evaluation.
THE TEACHING EVALUATION RECORD

1. The teacher is fair and impartial.

   The teacher's behavior is consistently unbiased.

   Sample Evidences
   Shows no favoritism or partiality; praise and criticism are based on fact; all criticism constructive; no pets; appraisal of pupils fair and reliable; no excessive criticism of individual pupils; maintains the confidence of children.

2. Pupils are happy and cheerful at work and play.

   The teacher creates a happy situation so that pupils express a liking for class.

   Sample Evidences
   A spirit of shared enthusiasm; spontaneous pupil or parents comment; friendliness and cooperation of the pupils; pupils approach and visit with teacher during their free time; cheerful exchanges of greetings and conversations between pupils and teacher.

3. Pupils are met in a friendly and sympathetic manner.

   Teacher is friendly in manner and tone of voice to all pupils; consistently gives attention to individual questions and apparent needs for individual help; sympathetic with failure due to difficulty; is a sympathetic and understanding listener as indicated by:

   Sample Evidences
   Teacher's cordiality, kindliness, courtesy, and display of good manners is indicated by consideration of pupils' feelings in the presence of the class; minimizing accidents, unfortunate incidents or embarrassing situations; frequent requests for the teacher's help on personal and educational problems; teacher acceptance of and attention to pupils questions even if unrelated to the subject at hand; teacher gives time to help individual pupils.

   Contributions and efforts of individual pupils are given recognition.

   Teacher shows respect for pupil opinion and suggestions.

   Sample Evidences
   Expresses interest and gives appropriate commendation to pupil effort even if small. Attention is given to individual comments and problems.
5. Pupils take responsibility seriously; cooperative and sportsmanlike behavior is evident.

Pupils are orderly and businesslike in schoolroom; show pride in achievement; cooperate in group activities.

Sample Evidence

Efficient use of school time to accomplish assignments; assumptions of responsibility for their own materials, for preparing and turning in of assignments and other materials; improvement in remembering and meeting obligations. Pride shown through careful preparation of work and voluntary expressions of satisfaction in work completed. Practical application of the “Golden Rule” by pupils.

6. Plans are adapted to meet the changing needs and circumstances.

Teacher demonstrates initiative and adaptability in adjusting predetermined plans to circumstances and individuals.

Sample Evidence

Utilization of lesson plans that are flexible enough to use contributions and suggestions of pupils; adaptation of methods and technics to meet the individual needs of pupils; development and use by the teacher of new methods and materials to meet the varying needs of pupils; utilizes pupil questions, leads, contributions and community events. Makes effective use of local community resources, lay experience, local, state and national institutions in adapting program to needs of pupils.

7. The teacher’s explanations are clear and adequate.

Teacher’s instructional vocabulary and materials are suited to the pupils; he calls attention to the points of major importance; anticipates difficulties and explains in advance.

Sample Evidence

Pupils approach tasks unhesitatingly and independently; successfully accomplish the assignment without unnecessary questioning, their oral and written responses indicate their understanding of the explanation.

8. Pupils’ learning tasks are purposeful and functional in nature.

All work is approached from the standpoint of use and value to the pupils in society, tying it to the pupils’ past experiences and present and future needs, as shown by:

Sample Evidence

The many practical applications made by the teacher and by the pupils; materials consistently related to contemporary life; utilization
of resources to point up the relationship of school learnings with out-of-school life; explanation or demonstration of principles in terms of local contemporary problems or concrete issues; class activities which simulate current situations outside the school; discussions which indicate that pupils are relating their class learnings to their own experiences. Application of the scientific method.


Through teacher-guided self-analysis and diagnosis of interests and abilities, and of present and future needs, pupils and teacher together set appropriate goals.

*Sample Evidences*

Pupil participation in planning curricular and extra-curricular activities and in setting individual class goals; pupil awareness of goals is evident.

10. Opportunities are provided for practice in the use of the common integrating knowledge and skills.

Definite provision is made for repetition, review and recall of basic learnings through a variety of activities such as:

*Sample Evidences*

Meaningful practice exercises, written and oral reports, dramatics, debates, book reviews, class discussion, projects, school publications, brief reviews of previous work; effective use of repetition and summary.

11. Teacher's leadership is evident.

Teacher handles his own discipline problems, is firm but friendly, is consistent in policy, is self-sufficient and self-confident in management of pupils.

*Sample Evidences*

Maintains good order without compulsion; makes few reprimands; infrequent necessity for disciplinary action. Pupils show respect for the teacher, his knowledge and his methods as evidenced by courteous attention, seeking his help.

The classroom situation is orderly and businesslike; pupil-care in moving about room so as not to disturb other members. Behavior of pupils at beginning of sessions, at recess and free play periods indicates planning and control.

12. Teacher adjusts the physical features of the room to provide a healthful and attractive environment as far as circumstances permit.

Teacher provides proper physical conditions as far as is within his control.
Sample Evidences

Heat, ventilation and lighting adjusted; proper placement of furniture in relation to windows and blackboards; furniture size adjusted, as far as possible to the size of the pupils and adapted to the work at hand; provision for reading groups; science forum; exhibits; project work; room neat and attractive; pupils express pride in room and contribute to effectiveness and conditions.

13. Pupils exhibit an attitude of mutual respect and tolerance.

Pupils grow in respect for others as indicated by:

Sample Evidences

Their attention to and consideration of associates without discrimination; their comments and actions indicate a growing sensitivity to the problems of other people; pupils of various types and backgrounds work happily together.

14. Pupils and teacher share the enjoyment of humorous situations.

Teacher demonstrates and capitalizes on sense of humor.

Sample Evidences

Teacher and pupils contribute amusing thoughts and interpretations; teacher can take a joke, makes classwork fun.

15. Teacher shows self-control.

Teacher is calm, poised, and self-controlled.

Sample Evidences

Teacher is even-tempered in response to pupils, avoids sarcasm and nagging; remains poised in emergency situations; handles unanticipated problems calmly and objectively, remains calm and collected in the face of frustrating or persistently difficult situations.

16. Pupils participate in planning behavior standards.

Pupils and teacher together, evolve standards of conduct.

Sample Evidences

Pupils develop their own behavior rules and policies under teacher guidance; opportunities are provided for planning and operation of self-government by pupil groups; group discussion of standards; evident effort on the part of pupils to attain standards.

17. Pupils consistently appraise their own work.

Pupils evaluate their own experiences and accomplishments and those of others.
Sample Evidences

Group discussion of the aims, the methods used, and the successes and failures of the learning experience; teacher-guided group and individual analysis of test results, pointing up of analyses by the use of blackboard, charts, and graphs.

18. Teacher and pupils keep records of pupil growth.

Presence of adequate and accurate records of pupil accomplishment and weakness.

Sample Evidences

Such records cover health, physical traits, attendance, achievement in academic learnings as recorded by teacher's marks, standard test scores and samples of pupil's work. Pupils keep individual charts, graphs or other records of their own achievement.

19. Teacher records of pupils reveal growth.

Satisfactory progress, in relation to ability, in knowledge and skills, social adjustment and personal habits and attitudes on the part of most pupils, as shown by:

Sample Evidences

Individual records indicating level of attainment of each pupil at the beginning of the term, individual and group strengths and weaknesses indicated by diagnostic tests and other evaluative devices, progress indicated in records of achievement, various tests, pupils' written contributions, anecdotal records.

20. The teacher makes active use of significant aspects of pupil growth as a guide in planning activities.

Activities are planned to meet the personal and social needs of the pupils.

Sample Evidences

Adaptation of content and procedures to such individual needs as success experiences; activities varied and of such duration as to prevent fatigue and over-stimulation; use of special aptitudes; improvement in habits of neatness and cleanliness and in physical status of pupils as revealed by teacher and pupil records; group and individual assignments adapted to abilities and interests.

21. Problems are presented in a manner which stimulates pupils to contribute to the solution.

Presentation inspires pupil effort, arouses their curiosity and interest, their desire to explore, evidenced by:
Sample Evidences
Pupil questions and discussion; their voluntary investigation and experimentation; bringing in materials; relating own experiences.

22. Pupils actively participate in classroom discussions and activities.

Program and technics are such as result in active participation of pupils.

Sample Evidences
Pupils give and take suggestions freely; share experience and knowledge through discussion, committee work and other cooperatively planned work and play activities; notable motivation of previously disinterested pupils; organization of activities such as student committee preview of visual aids to check their usefulness in terms of class objectives.

23. In developing basic knowledge, understandings and skills, the teacher employs materials and technics appropriate to the varying abilities and backgrounds of the pupils.

Materials and technics are adapted to meet individual differences by such methods as:

Sample Evidences
Projects and problems planned around interests and experiences of the pupils; projects for groups organized according to the interests and abilities of individuals; assignments differing in length and difficulty; remedial work provided, aimed at the cause of the difficulty.

24. Teacher guides the pupils into efficient study habits.

Teacher helps pupils to analyze study habits and to devise and use more efficient study methods.

Sample Evidences
Through assignments, individualized instruction and the organization and supervision of seatwork, gives instruction and practices in study; uses supervised study, emphasizing points of interest and importance; budgeting study time.

25. Pupils make use of a variety of source materials.

Pupils demonstrate ability to find and use material related to their problem.

Sample Evidences
Teacher suggests reference material, has it readily available. Use of library indicated by volunteer visits and record of books taken out. Pupil use of source materials such as dictionary, encyclopedia, books, magazines, newspapers, maps, globes.
26. Teacher employs a variety of approaches in presenting new materials.

Teacher shows adaptability and broad understanding of technics in his presentation of new materials.

*Sample Evidences*

Teacher uses many illustrations, utilizes suggestions from pupils as to methods and procedures; changes method quickly when it is obvious that the method being used is not effective; encourages pupils to try out several solutions; teacher and pupils discuss the relative merits of the various solutions.

27. Pupils' experiences are utilized in motivating interest.

Teacher's use of pupils' interests with adaptation to class objectives.

*Sample Evidences*

Pupil activities and participation; exhibits showing pupil planning and execution such as hobby exhibits, drawings, puppets, charts, handwork, slides and picture strips, dramatizations, exhibits of costumes and souvenirs from other countries or sections of this country brought by pupils from home; gifts brought by children for children's homes, hospitals, etc.

28. Opportunities are provided in and out of class for the development of leadership and cooperation among pupils.

Pupils participate and cooperate as leaders, partners and followers in the development of activities in and out of class.

*Sample Evidences*

Organization of many and varied purposeful committees, debates and panels. Pupils act as group chairmen and discussion leaders; cooperate and take active part in community projects and homeroom activities, social activities are encouraged. Teacher voluntarily gives time and assistance to outside activities.

29. The pupil's curriculum is enriched through the use of a variety of materials to supplement the basic program.

The teacher enriches the basic program within the limits of the school resources.

*Sample Evidences*

Exhibits, models, slides, film, radio, maps, reference books, flash cards, timed exercises, classroom museums, field trips, excursions, record players, musical instruments, newspapers, magazines, bulletins or pamphlets, globes, bulletin boards, charts, photographic material and equipment, graphic blackboard, diagrams and graphs, worksheets, mimeographed material, experiments, artwork in various media, herberia and aquaria, library.
30. **Supervised play and recreational activities form a definite part of the program.**

The teacher is resourceful in the use of play-type activities and informal activities.

*Sample Evidences*

Opportunities for specific learnings are provided through play activity; play, such as rhythm, dances, games, dramatic play, informal and organized educational activities, parties and programs purposefully planned by the pupils; play days utilizing pupil interests in sports and sportsmanship; puzzles, competitive games, related problems, stimulating social activities and clubs.

31. **Teacher provides opportunities and materials for creative work.**

Teacher provides the talented pupil with opportunity to develop his interests.

*Sample Evidences*

Variety of materials provided, sufficient time allowed for this work, situations created in and out of school for the development of this interest.

32. **Teacher seeks and uses the advice and assistance of 'specialists' to supplement his own teaching.**

Teacher grows in meeting needs of pupils.

*Sample Evidences*

Confers with school nurse, attendance officer and guidance counselor. Students with physical defects given attention such as: giving pupils with auditory defects special seats and those with defective vision proper lighting; improved attendance records; results from remedial instruction.
ANECDOTAL INFORMATION

Use additional sheets as needed to record evidence in support of the ratings.
THE TEACHING EVALUATION RECORD

Teacher's name

Grade or subject

School

Dates of observations

Sum of ratings
Score \[ \frac{\text{Sum of ratings}}{\text{Items observed} \times 4} \] = Final score...

Suggestions

Recommendations