1966

A Study of the Critical Requirements for Elementary Curriculum Consultants in a Major Urban Area

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A STUDY OF THE CRITICAL REQUIREMENTS FOR
ELEMENTARY CURRICULUM CONSULTANTS
IN A MAJOR URBAN AREA

by

James F. Moore

A Dissertation Submitted to the Faculty of the Graduate School
of Loyola University in Partial Fulfillment of
the Requirements for the Degree of
Doctor of Education

January
1966
LIFE

James F. Moore was born in Chicago, Illinois on April 12, 1929.

He was graduated from Leo High School, Chicago, Illinois in 1947. His undergraduate work was done at Chicago Teachers College, Chicago, Illinois where he received his Bachelor of Education degree in June of 1951. In 1953 he received his Master of Education degree from Loyola University, Chicago, Illinois.

Since 1951 Mr. Moore has been employed by the Chicago Board of Education. From 1951 to 1958 he served as an elementary teacher, head teacher and assistant principal in various schools. In 1958 he was assigned as the first elementary social studies consultant in the Department of Curriculum. In 1960 he was assigned as principal serving at the Jefferson and the Carver Elementary Schools. In 1965 he was assigned as principal of Morgan Park High School. In addition to the above experience, he has been a part time instructor at Saint Xavier College, Chicago, Illinois.

From 1959 to 1964 he had administrative and supervisory responsibilities for the Special Summer School Program of the Chicago Public Schools.
ACKNOWLEDGEMENT

The cooperation and assistance of many persons have contributed to this study.

The initial work was due to the inspiration and leadership of Mrs. Evelyn F. Carlson, Associate Superintendent of the Chicago Public Schools. A special word of appreciation is extended to the many curriculum consultants of the Department of Curriculum of the Chicago Public Schools -- my professional colleagues.

A sincere expression of gratitude is extended to Dr. Arthur P. O'Mara, who provided invaluable guidance and encouragement throughout the course of this study. To each one of the writer's committee -- Dr. S. Mayo, Dr. E. Proulx, Mr. D. Van Bramer, Dr. J. Wozniak -- the writer expresses appreciation.

Finally, to my parents Mr. and Mrs. Thomas A. Moore for making my education and profession possible and to my wife, Clare, whose contribution can never be measured.
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CHAPTER I

THE PROBLEM AND DEFINITION OF TERMS

Introduction

Public education like business, government, industry and other fields continues to increase in complexity. The importance of instructional leadership in mid-twentieth century education is highlighted by the tremendous physical growth of educational programs in large urban areas. Concomitant with this growth are the rapid changes in cultural developments and influences. The factors of growth and change have caused a demand for increased services to the instructional programs of the schools faced with these elements. Although each service position in a school system is part of a network of forces which characterize this system, these forces originate with the needs of the persons concerned.

One of the newer positions designed to provide instructional leadership is that of curriculum consultant. However, the use of specialists in supervisory positions is not new. Special supervisors were added to the central office staffs of many school systems at the beginning of the twentieth century. For the most part, the role of these early specialists was of an inspectional and administrative nature. This authoritarian concept of supervision was carried forth in many instances through the
1930's.

The more prevalent philosophy since that time is that there should be an atmosphere of cooperation between central office consultants and teaching staffs in the improvement of instruction. There are, however, no set patterns for the kind of cooperative efforts which will insure successful working relationships. Nevertheless, the challenge to curriculum consultants as leaders for the instructional improvement demanded by the urban area problems is to make the consultant role a position of leadership characterized by successful functioning and maximum service. In order that he may function successfully, the job of curriculum consultant needs to be defined in terms of requirements for the position.

The Problem

Statement of the Problem It is the purpose of this study (1) to obtain from Chicago Public School teachers, principals and consultants descriptive behaviors of the elementary curriculum consultants in a major urban area which are effective or ineffective in improving classroom instruction, (2) to determine the critical competencies needed for effective consultant service based upon an analysis of the reported behaviors.

This study should help answer the following questions:

1. What are the effective and ineffective behavior elements of the elementary curriculum consultants as observed by principals, teachers and consultants?
2. What are the critical requirements for the job of
Since two categories of respondent groups, principals, teachers and consultants, have supplied the necessary data for the determination of critical competencies, it is hypothesized that there may or may not be significant differences between respondent groups. Therefore, a null hypothesis will be set up and tested by means of the rank order method of correlation.

There is no significant difference between the perceived critical competencies of consultants as they are perceived by the consultants themselves and as they are perceived by principals and teachers.

Need for the Study  It has been recognized that a changing American society is giving rise to new demands for improved instructional programs for its boys and girls in its schools. Instructional improvements are dependent upon the personal growth and development of the individual teacher. Consequently, to help the teacher improve in order to enhance our instructional programs, we must work in terms of changing the perceptions held by such a person and at the same time help him to develop his professional skills, knowledge and understanding.¹

plosion of pupil population and the tremendous growth in teaching staff. During a ten-year period in the Chicago Public Schools the total elementary and high school population enrollment increased from 435,819 pupils in 1954 to 552,787 pupils in 1963. During this same period there were 13,544 teaching positions in 1954 and 19,637 teaching positions in 1963. Of the teaching positions in 1963, 6,744 were filled by temporary teachers. This tremendous growth has created unprecedented instructional problems and has caused every available resource to be brought to bear on these problems.

Bringing on-the-job assistance to teachers has become recognized as the primary function of local supervisory personnel. The service most desired by school superintendents of Kentucky in 1949 was consultative service, although the term "educational consultant" did not appear in Education Index as an index title until 1948. The term consultant has come to have a wide variety of connotations. Some school systems have designated the special subject matter specialists and general supervisors as consultants;


4Woodson W. Fishback, "Improving Instruction through Consultative Service," Educational Administration and Supervision, XXXVI (October, 1950), 374.
State Departments of Education also use the term for certain staff members; local and state organizations so designate persons brought in for specific work; many universities and colleges engaged in cooperative research projects use the term to designate their field workers.

In the present discussion the term consultant will apply to the specialists that are housed centrally and organized administratively as a part of the central office staff, but while working in a given school the central office consultant works under the direction of the principal. The consultant's major responsibility is that of assisting teachers in the classroom. Goodlad's definition of "consultant" is therefore used in that the consultant, "is brought from outside the institutional group that is to be affected and is skilled in helping people see and work through their problems."5

A significant element in education today is the increase in the number of specialists being assigned to assist teachers in the improvement of instruction. However, ways must be found to utilize specialists' services to the greatest advantage.

Hansen has stated:

Although there are no national tabulations to indicate the extent of the trend, more and more school systems are employing an ever widening variety of specialists. . . . Unfortunately the utilization of specialized personnel

has not been subjected to objective analysis in educational literature nor do we have widely accepted procedures and practices to serve as guidelines for action.  

The writer of this dissertation deemed his study valuable because of an apparent lack of specificity in the current literature on the specific behavioral actions of major urban area consultants. Analyses have been made of supervisory or consultant behavior, but this educational material contains long lists of traits or qualities of a general nature. Extensive lists of the qualities of the ideal supervisor have been compiled by Burton and Brueckner, Rorer, and Spears, usually in the form of checklists. One of the most extensive checklists for appraising supervision is that compiled by Ayer and Peckham. This instrument, including a set of 291 evaluated practices classified under the ten leading principles of supervision, was evaluated by 177 education specialists, supervisors, administrators, and teachers. This list facilitates self-evaluation by supervisors. The authors say:

It calls attention to the broad array of principles, techniques, and administrative provisions which need to be considered thoughtfully and provides a scale of cur-

---


rent values to fortify more exact thinking on the part of supervisory agents. The ultimate validity of the percentages given to the various items in the Check List are subject to the semantic and statistical shortcomings associated with all pooled opinion and should be so treated. On the other hand, the comparative values assigned to the different items reflect objectively the considered opinion of the highest type of qualified judges and, as such, deserve discriminating consideration by all who use the Check List.

Finally, there is ample evidence to indicate that many supervisors have a hazy idea about how to translate supervisory principles into supervisory activities. A more objective understanding of guiding principles is essential if supervisory practices are to be truly guided by a philosophy of supervision. A guiding principle must first of all be abstracted from a series of successful activities and conditions.\(^\text{10}\)

Also, Bartky has indicated that the situational approach, or describing behavior in typical situations, is more effective than the listing of relevant traits.\(^\text{11}\)

What is needed is an inductive definition of specific supervisory competencies which are considered critical for operational success in specific situations. This determination of competencies would provide an objective contribution to the present knowledge of supervisory behavior. The present study is intended to provide such a definition and determination, and aims to clarify the nature of the requirements for such behavior. Investigation of critical requirements for elementary curriculum consultants may serve as a basis for making suggestions and

\(^{10}\)Fred C. Ayer and Dorothy Reed Peckham, *Check List for Planning and Appraising Supervision* (ustin, Texas: The Steck Company, 1948), p. 1.

recommendations for (1) formal job descriptions, (2) personnel selection for consultant positions, (3) the improvement of evaluation techniques. Findings of the study may also provide a basis for self-improvement on the part of the consultant.

Delimitation of the Problem This study was concerned with a random sample of elementary teachers and principals who have utilized consultant service and the consultants who rendered the service. The respondents were drawn from every school district within the Chicago Public Schools. The study is directly concerned with consultant behavior that relates directly to individual techniques or one-to-one relations between the teacher and consultant. The competencies required for large group workshops and central office functions are not within the scope of this study.

Definition of Terms Used

Critical Incident.--Any observable activity that is sufficiently complete in itself to permit inferences and predictions to be made about the person performing the act. To be critical, an incident must occur in a situation where the purpose or intent of the act seems fairly clear to the observer and its consequences are sufficiently definite to leave little doubt concerning its effects.12

Critical Behavior.—The specific act observed and included in that critical incident that is believed by the respondent to have made a significant contribution either positively or negatively toward accomplishing the purposes of the elementary school consultant. Any one incident may contain one or more behaviors.13

Critical Requirement.—A descriptive statement which summarizes all of the similar critical behaviors characteristically associated with the concept embraced by the statement. The term critical competencies is used interchangeably with this concept.

Critical Requirements.—Those things which a consultant should do to be successful in his job. Specifically, these comprise the job definition of the elementary school consultant as determined by critical behavior in job performance.

Consultant.—A person from the Department of Curriculum of the Chicago Public Schools who works under the direction of the district superintendent and individual school principal and aids in the improvement of instruction.

Methods of Procedure

In this study the critical incident technique is used to determine the critical requirements of the elementary school consultant. This approach to the problem of job requirements was 13Ibid., 338.
developed by John C. Flanagan of the American Institute for Research and the University of Pittsburgh. Flanagan stated that the American Institute for Research has conducted several research projects which utilized the critical incident technique to determine critical requirements for a number of jobs in terms of job behaviors.14

The application of this technique to the field of educational research is relatively new. However, those who have applied it to research problems in education have indicated that it is a step forward in the direction of scientific development of criteria for evaluation of job performance, for personnel selection, and for improving pre-service and in-service programs of preparation. Several of these studies are cited in Chapter II, "Review of the Literature."

Essentially the critical incident technique, according to Flanagan, "consists of a set of procedures for collecting direct observations of human behavior in such ways as to facilitate their usefulness in solving practical problems and developing broad psychological principles."15

Complete details of procedures are treated in Chapter III.


15 Flanagan, Psychological Bulletin, LI, 326.
Organization of Remainder of the Thesis

Chapter II, Review of the Literature, presents an account of selected reading and research pertinent to the problem. The Chapter includes a brief evolutionary account of consultant services in the United States. It draws upon professional books and articles for theoretical data concerning consultant roles and activities. Further, this chapter gives an account of the research projects in education which utilized the critical incident technique.

Chapter III, Procedures for Conducting the Investigation, includes a review of the critical incident technique and describes the development and implementation of the research scheme for this study. Specifically, it explains the development of the data-gathering device, selection of respondents and the procedures for collecting data.

Chapter IV, Analysis and Interpretation of Data, presents a compilation of data into practical form and arranges in systematic order the critical requirements that were obtained from the incidents reported.

Chapter V, Statistical Test of One Major Hypothesis, presents a statistical analysis using rank order method of correlation to test the stated hypothesis.

Chapter VI, Summary, Conclusions and Recommendations, contains a general summary of the study conclusions derived from
analysis of data and recommendations for practical applications of the findings.
CHAPTER II

REVIEW OF THE LITERATURE

Introduction

Much has been written in the subject of supervision in the past thirty years, and the treatment has been varied. Progress in the literature in this field was slow. Scott states that up to 1914 there had been only three major books devoted to supervision and that from 1910-1914 only nine articles on the subject had been listed in the Readers Guide to Periodical Literature.¹ Today, bibliographies are available listing books, articles and research studies dealing with supervision. Many of the books are comprehensive treatments of the field. Articles and research studies deal with the various aspects of supervision, but there is still a lack of in-depth writing in the field. Harris, in 1963, cited this analysis of current writing:

Listings in the Education Index for the past ten years number only 36 per year on the average under the heading, "Supervision and Supervisors." In none of these years was more than a single article listed as supervision research.²

¹C. E. Scott, "Continuity as an Aim in Supervision," American School Board Journal, XII (April, 1924), 44.

²Ben M. Harris, "Need for Research in Instructional Supervision," Educational Leadership, XXI (November, 1963), 135.
An exhaustive treatment of the literature dealing with the behavior of supervisory personnel or having implications for such personnel would involve a considerable amount of repetition. An attempt is made in this chapter to select from the literature those writings which contribute different ideas and, at the same time, have the most direct bearing on this study.

This chapter will treat: (1) a brief historical perspective of related literature, (2) a description of supervisory and consultant positions, (3) studies related to consultant behavior, (4) studies which have utilized the critical incident technique, (5) non-related studies which have utilized the critical incident technique, (6) summary.

A Brief Historical Perspective of Related Literature

Four distinct periods in the development of supervision have been reported by Spears; inspection, teacher training, scientific classroom management and cooperative educational leadership. These stages have been clearly delineated and accepted in the literature of the field.\(^3\)

Supervision was recognized as one of the tools for the improvement of instruction early in the twentieth century. One of the earliest publications in the field of supervision, titled \textit{Supervision of City Schools}, enunciates the importance of super-

vision and describes its function as determined by the superintendent. As the superintendent's responsibilities became diversified, he began to delegate more of the supervisory activity to new supervisory officers. These officers were specialists in the academic subjects of an enlarging curriculum.4

Another early treatment in the field of supervision is Nutt's book, The Supervision of Instruction. This book, published in 1920, describes the work of the supervisor, supervisory activities, principles underlying the supervision of instruction and devices to illustrate the principles, techniques, and the evaluation of supervision.5

One of the early and frequently quoted studies dealing with supervisory personnel was done by Ayer in 1923. Forty-four cities of 100,000 or over in population were included in the study. After studying and analyzing city school directories, Ayer organized the supervisory personnel into fourteen groups of departmentalized activities. Ayer found a wide range of varieties in the titles of supervisors doing essentially the same kind of work and a relative number of supervisors employed in

---


connection with different subjects and services.  

Another early investigation was made by Barr. Using supervisors' reports and time cards, Barr found that the supervisor's work included a wide range of activities. The three types of activities that received the highest amount of their time were: (1) research and study, (2) general administration, (3) preparation of materials.

In Southall's study, supervisory conditions and practices of two hundred representative supervisors were reported in a rather detailed checklist. Representative groups of specialists in supervision, superintendents employing general elementary supervisors, and teachers working in supervised systems were asked to estimate the extent of use and value of six direct agencies of supervision on a four-point rating scale. The purpose of the study was to determine how these six direct agencies of supervision: (1) classroom visitation, (2) directed teaching, (3) demonstration teaching, (4) directed observation, (5) individual conference, (6) teachers' meetings, including group conferences, are used by general elementary supervisors.

Southall found that classroom visitation to observe

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teaching is the most widely used of the direct supervisory agencies and ranks first in the approval of specialists, superintendents, and teachers. The individual conference with teachers and principals was also among the most frequently used of the direct supervisory agencies. The kinds of conferences held, named in frequency of use, are (1) with the teachers following a classroom visit, (2) with the principal after one or more visits in his building, (3) with the principal before classroom visits, (4) with the teacher prior to an observation. This ranking was confirmed by the group ratings of specialists, superintendents, and teachers. 8

Many of these older studies merely listed in a quantitative fashion the supervisory activities and made no attempt to qualitatively evaluate the activities.

During 1945-46, the committee responsible for the 1946 Yearbook of the Association for Supervision and Curriculum Development of the National Education Association conducted a study as a basis for the preparation of the Yearbook. The data were secured through the use of a questionnaire. The data presented provided material of national scope related to the various aspects of supervision. Many of the specifics which are a part of earlier studies are included in this study, and many of the conclusions are similar to the studies that preceded it.

8 Maycie Southall, Direct Agencies of Supervision As Used by General Elementary Supervisors, Contributions to Education, No. 66 (Nashville: George Peabody College for Teachers, 1930).
The changes noted are easily traced to changes in educational philosophy and objectives of supervision which had occurred over the previous twenty years.\textsuperscript{9}

In a summary of the research related to supervision, Kyte, in 1947, states:

An analysis of the literature dealing with the supervision of elementary education indicates two general trends permeating all others. 1. There has been a widespread tendency to retain that which has proved sound in supervisory organization and procedure. 2. Innovations and modifications have been planned and instituted which increase and improve the effectiveness of supervision. These trends are evident in the definitions, organization, operation, objectives, and appraisal of supervision.\textsuperscript{10}

The changing goals of supervision and the changing role of the supervisor were noted by Burton and Brueckner in suggesting that the word supervisor be dropped. In its place a new title such as consultant or advisor which truly exemplifies a consultative function should be used.\textsuperscript{11}

To provide an appropriate analysis of supervision today is a difficult task. Spears has stated:

\begin{quote}
It is not a simple matter to catch the true picture of school supervision today. First, it is a period of marked transition. Perhaps no field of school operation
\end{quote}


has played host to so many innovations in so short a
time as has supervision. Consequently, current prac­
tice is quite elusive. Its many ramifications as
well as its continuous movement suggest the difficulty
of securing the actual image.12

Descriptions of Supervisory or Consultant Positions

Having established an historical basis for the role of
the supervisor, it is necessary to review briefly the general
role of the supervisor or consultant as presented in the litera­
ture today. Since this study is directed toward the curriculum
consultant, it is well to cite different courses that clearly
establish the general function of the elementary curriculum con­
sultant. The 1960 Yearbook for the A.S.C.D. presents this
analysis:

The primary function of the consultant is to help in
the improvement of classroom instruction; to work co­
operatively with principals in assisting teachers
through demonstration teaching, group and individual
conferences, making teaching aids, interpreting
courses of study and working cooperatively with the
staff on common educational problems.13

Titles for persons serving in supervisory positions in
schools are numerous and are changing, but the present emphasis
is on the word consultant to denote what has been commonly called
supervisor. When county supervisors in Ohio were asked to name

12Spears, 3.

the title which they had considered to be most desirable for themselves, 37 per cent listed "consultant" and 27 per cent listed "coordinator." In actual practice, however, 87 per cent of these persons held the title "supervisor." In this same study, superintendents, principals, and teachers indicated that they preferred the titles consultant and coordinator. Teachers, to a greater degree than others, indicated a dislike of the title of supervisor.14

Regardless of the title, there is general agreement as to the various job functions that exist for consultants today. The 1965 Yearbook for the A.S.C.D indicates that since the titles supervisor and curriculum director are used interchangeably, the terms might best indicate persons who contribute to the improvement of teaching.15

Burnham and King provide this description:

Consultant is a title that is frequently given to central office personnel who are perceived to be in a helping relationship to building staff. Curriculum committees and individuals. . . . The term is used increasingly to denote service in special fields or at specified levels; for example, consultant in


elementary education. . . . 16

Adams and Bowie, 17 and Laing 18 viewed supervisors as concerned with improving all learning opportunities. The supervisor's role was that of a service agent, not a line officer.

The Oregon Schools have considered the curriculum consultant as an inside expert who must apply the principles of leadership to promote instructional change. 19

Since this study is limited to the central office consultant, it is not germane to explore the consultant roles that are taken up by outside agency consultants except as their work bears on individual relationships with teachers. Later in this chapter a synthesis of outside consultant activities will be presented. It still remains that the generally accepted educational principle for the function of supervision is the improvement of instruction. Although, through definition, this function has been expanded, most authorities agree with that basic definition.


The implication of the statement "the improvement of instruction" is that the supervisory actions must produce definite results. In order to fulfill the purpose of supervision, the consultant must possess certain competencies. The following section will take up the studies which have dealt with supervisory competencies required by consultants.

**Studies Related To Consultant Behavior**

Accompanying the growth of new supervisory positions have been efforts by various individuals and groups to study supervisory roles to define them more clearly. State and national groups such as the Association for Supervision and Curriculum Development, doctoral candidates and school administrators have used a variety of research techniques to collect data about the behavioral requirements for supervisors or consultants.

Several differing research techniques have been utilized traditionally in the collection of data; the questionnaire, check list or anecdotal research approach. A more recent and promising technique has been the critical incident technique. A study by Hallberg utilizing the questionnaire approach was designed to consider the behaviors relating to the role of the general elementary supervisor in Oregon; that is, the expected behaviors and the actual behaviors perceived by supervisors.

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principals and teachers. To find the answers, a questionnaire was formulated comprising eighty-eight statements designed to describe behaviors of the elementary supervisors. These statements were arranged under categorical headings:

I. Encourages Professional Growth of All Personnel
II. Gives Assistance
III. Builds Morale
IV. Continues His Own Professional Growth
V. Initiates Ideas and Programs
VI. Serves as Evaluator
VII. Serves as Coordinator
VIII. Serves in an Administrative Capacity
IX. Serves as Secretary or Office Worker

The particular behaviors for which the respondent groups found congruency existing between their expected behaviors for the supervisor's role and the actual behavior of the supervisor were few, only twenty-three behaviors out of the eighty-eight. Those highest in value were the following categories:

I. Encourages Professional Growth of All Personnel
II. Gives Assistance
III. Builds Morale

Lonsdale, in an extensive study of supervision in general, reported that the highest percentage of supervisor's time was devoted to the full or shared responsibility for; (1) visits to classrooms, (2) work with individual teachers, (3) preparation of curriculum materials, (4) teachers' meetings, (5) selection of instructional materials. No attempt was made to define the be-

behavioral requirements for each of these activities. 

Palmer, in a survey of Indianapolis school personnel regarding supervisory practices, concluded that elementary teachers wanted more demonstration lessons and more written evaluation. In comparing respondent groups, it was found that consultants placed more value on classroom visitation than did teachers; consultants thought more help was provided than the teachers thought they received. Abbott declared that the supervisory practices in Texas high schools that were best liked involved classroom visitation and individual conference.

Identification of several common concepts of supervision held by administrators and supervisors was studied by Fielstra. These concepts were considered in terms of frequency of use and degree of estimated effectiveness. Significant rank differences were shown. For example, classroom visitation ranked second in use, but was judged fourth in effectiveness.

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King's study, a doctoral dissertation at Ohio State University, had the following purposes:

1. To find the extent to which the participants perceived actual practice related to supervision in their school districts as agreeing with their concept of ideal practice.
2. To ascertain whether or not the participants perceptions of actual practice varied according to their positions in school systems.26

She found several areas in which there was agreement with regard to the role expectations of the county supervisor. These areas, as did the whole study, relate specifically to administrative functioning rather than to direct supervisory behavior.

In Iowa, Banister isolated ten roles that the county elementary consultant might be demanded to play. The problem of this study was to determine the degree of consensus among Iowa educators as to these roles. Two roles achieved considerable consensus: the role of help in teaching and the role of expert in academic matters. As a recommendation in his study, the author stressed the need for an evaluative study of the effectiveness of consultants.27

The Ohio Association for Supervision and Curriculum Development made a survey type study relating to the role of the supervisor in Ohio's schools to determine "what is" and "what should be". Both county and city supervisors were included in

26King, p. 68.
this study, and some variations were found in their responses. It appears that the expected roles and the actual roles of the supervisors, as seen by the supervisors, were fairly congruent insofar as their activities were concerned. Serious differences existed only in operational philosophy and policy.28

State supervisory organizations have attempted to study their own supervisory practices. Louisiana School Supervisors Association sought answers to the effectiveness of their practices. A group of supervisors kept a log of selected half day activities throughout the school year and selected one supervisory act that was written up in exact detail. This material was analyzed to discover the time allotted to and the supervisory acts practiced in various activities. Professional literature was analyzed to ascertain whether the supervisors' practices were recognized as the most useful. When the practices were compared with the literature they were found to be in agreement. It was noted that supervisors wanted additional research to find out what supervisory practices teachers think are most useful and to determine how much success is being achieved with certain specific supervisory techniques.29

28Research Committee, The Role of the Supervisor in Ohio's Schools (Columbus: Ohio Association for Supervision and Curriculum Development, 1959).

Carolyn Guss served as chairman of the Indiana A.S.C.D. Research Committee which conducted the following study. An opinionnaire was sent to a random-stratified sample of fifty persons in each of six groups in Indiana—administrators, principals, faculty members teaching education courses, parents, supervisors, and teachers. Six basic questions were asked. One question related to the function of the supervisor. Functions mentioned by the majority of the respondents were: improve instruction, help teachers achieve the most effective learning environment, inspire teachers and render expert advice concerning methods and materials. Another question was intended to find out what was judged to be the most important contribution of the supervisor to be actually performed. The answers to this question listed the following order of importance: helping teachers, especially new ones; improving classroom instruction; holding individual conferences with teachers; providing teacher guidance; improving morale. 30

An analysis of the answers of the six respondent groups shows that the teachers felt that:

To inspire teachers and to improve morale were given as functions and contributions of supervision. This aspect of supervision was not being performed. In the opinion of the committee, herein lies one of the most significant implications for possible behavioral changes on the part of supervisors. 31

31Ibid., 102.
A study of the roles which supervisors were expected to fulfill was based upon questions asked by a supervisor of principals and teachers. The three roles most required were: resource expert (what to teach, how to teach and with what materials); interpreter (of policies, guides and other resources); and coordinator (comparing what is happening at other grade levels in other schools).\textsuperscript{32}

Many of the studies of supervision have described the work of the supervisor as it is perceived by the observer. Some studies are now including the supervisor as an observer of supervisory behavior.

Cox and Lott presented one hundred behaviors of supervisors to respondents comprised of supervisors, teachers and principals. These behaviors were to be ranked according to "most liked" and "least liked". Principals and teachers found heavy significance, in the "most liked" category, upon the supervisor "having the know-how and giving it to the teacher," while supervisors placed this behavior in the "least liked" category.\textsuperscript{33}

Attempting to assess the major problems of supervisors and the actual causes of these problems, Turpin surveyed ninety-six supervisors. The major problem uncovered was insufficient


\textsuperscript{33}Johnnye V. Cox and Jurelle G. Lott, "A Study of the Perceptions of the Supervisor's Role" (unpublished study, Dept. of Education, University of Georgia).
time to render all supervisory services in a satisfactory manner. The supervisors stated that the causes of their problems are not isolated, but one of the major problems is that the supervisor's role is not clear to himself or to those with whom he works. 34

Although the current literature offers many broad views on the areas of assistance offered to teachers by consultants, certain basic areas appear consistently on many lists. The 1960 Yearbook of the Association for Supervision and Curriculum Development offers a list that appears to contain the points that are best illustrative of consultant activities:

1. Organizing classrooms, including grouping of children; setting up interest centers; advising on programs and developing materials.
2. Helping teachers develop better teaching techniques.
3. Observing teachers and pupils at work and conferring with the teacher following the observation.
4. Interpreting curriculum guides and assisting with lesson planning.
5. Helping to establish standards of work and behavior.
6. Arranging visitations for teachers within and between schools.
7. Acquainting teachers with supplementary materials.
9. Encouraging teachers to share abilities and talent.
10. Helping administer tests and interpret scores.
11. Helping teachers to solve problems of pupil control and discipline.
12. Demonstrating techniques through actual teaching.
13. Serving as resource person in before-school and after-school building meetings and area meetings. 35


351960 Yearbook, Leadership for Improving Instruction, p. 114.
Paralleling the literature on central office consultants have been reports of research devoted to the "outside" curriculum consultants who are from college or university campuses and state departments, a few from private agencies. The consultant role in these situations offers little to the present study, but some other points are pertinent to this study. The chief purpose of consultative service is to provide personnel to help teacher and administrative groups to deeper understandings and become proficient in the use of new techniques necessary to develop the most desirable kind of school program to serve the needs of the children. The most important of these services are problems of finance, teacher recruitment and training, building and grounds, public relations, curriculum construction and the reorganization of school districts. Eliff and Foshay feel that the consultant, as a resource person, acts as an expediting agent in the process of facilitating understanding.

The outside consultant's role is one of group orientation. He may be an active leader or an active member of the group, but he must be proficient in maintaining group cooperation.


37 William W. Savage, Educational Consultants and Their Work in Midwestern State Department of Education (Chicago: Midwest Administration Center, University of Chicago, 1962) p. 72.

tion. Savage, in his work at the Midwest Administration Center, asked 190 staff members in twelve state offices of education to list the five most important functions of consultant work in local school systems. They listed most frequently:

- Work with local school system in such a way that it becomes more competent to deal with educational problems. (78.9 per cent)

- Help local school representatives become more aware of and skilled in the use of human and physical resources. (64.2 per cent)

Observations of outside consultants at work have shown that consultants assume many different roles. James and Weber observed consultants as they worked with educational personnel and lay groups. Eighteen action roles were identified through observation. Ferneau noted that consultants giving assistance on the same problem in two different situations may be highly successful in one situation and unsuccessful in the other. Lawler, in her work with a university consultant program, attempted to find out the factors which facilitate and impede consultant service. Through the use of interviews, data were obtained that revealed that the factors which facilitated or impeded the work of consultants were: (1) problem definition, (2) group

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39Savage, p. 28.


climate, (3) ways the consultants worked, (4) leadership responsibilities of the central office.42

The review of studies dealing with outside consultants offers the following points of general application that have value for this study. These points are taken in relation to the competencies required for consultants in a one-to-one relationship with teachers:

1. The consultant is expected to give direct answers to questions.
2. The consultant is expected to offer a sympathetic ear to individuals with problems.
3. The consultant is expected to help a teacher work out a compromise between theory and practice.
4. The consultant is expected to collect information related to specific problems.
5. The consultant is required to demonstrate techniques that do not lend themselves to explanation.

The studies presented thus far are characterized by two statements from Burton and Brueckner:

First, the mere listing of activities' characteristics of the older studies has given way to critical listing. The purposes for which activities are performed are scrutinized and hence appropriation to given circumstances is established. Second, the static view reflected in statistical listing is giving way to notation of innovations and trends, though frequency listing is still important.43


43Burton and Brueckner, 19.
In light of the situation described in this chapter thus far, we must turn to the studies that have provided the research literature which is useful in this study. Foster, in her study, commented on the need for such a study:

A review of the current literature revealed few research studies concerned with the problems of supervision. The available material lacked specificity. In view of this situation, it appeared that it would be valuable to clarify the competencies needed by supervisors.45

Recently, three studies using the critical incident technique related to competencies needed by consultants or supervisors were completed at Stanford University. Knight studied the perceptions of the supervisory roles held by supervisors and principals.46 Ord examined the competencies of county school consultants as perceived by teachers in rural schools and county consultants.47

44The critical incident technique as a research tool is more completely treated in Chapter III.


Foster's purpose in her study was to define inductively and clarify the nature of the competencies of the supervisor as perceived by elementary teachers and supervisors.48

These studies have made contributions toward developing an operational statement for consultants. However, they have been confined to small samples and specific groups which do not include consultants from a major urban area.

Knight, in his doctoral study at Stanford University, examined the perceptions of the elementary school supervisory role held by supervisors and principals. He also compared and contrasted the perceptions held by each group. In analyzing the work of the supervisors after his interviews with thirty-six elementary supervisors and forty-seven elementary school principals, he compiled a list of 351 effective incidents and 131 ineffective incidents of the supervisors which he categorized under three major areas; (I) Working with and helping principals, (II) Working with parents and parent groups, (III) Working with and helping teachers. From this list he defined twenty-three critical behaviors for elementary supervisors. He found the largest number of the critical behaviors, 78.6 per cent, in Major Area III. Major Area I accounted for 16.8 per cent of the total number of critical behaviors and Major Area II accounted for 4.8 per cent of the critical behaviors.

48Foster, 3.
Of these twenty-three critical behaviors, supervisors and principals were in accord on only three behaviors; "makes an accurate evaluation of teachers' work for the principal to aid him in understanding his needs," "gives demonstration lessons illustrating new techniques of help to the teacher," and "gives help to teachers when requested without unnecessary delay." Of the remaining twenty behaviors, principals found 14 of them critical while supervisors found six of them critical. Analysis of the data seems to indicate that there is in fact, lack of agreement between supervisors and principals as to their perceptions of the elementary school supervisory role.⁴⁹

As a result of this divergence of role expectations and the accompanying potential for role conflict, he recommended closer communication between supervisors and principals, cooperative planning, joint orientation programs and continued evaluations and examinations of supervisory programs.

Ord, in analyzing the work of consultants, selected fifty elementary school teachers and fifty elementary school consultants from rural areas. Each person was requested to write four incidents, two that were effective and two that were ineffective. A total of 460 behaviors were categorized under four major headings:

I. Curriculum materials  
II. Methods and instructional procedures  
III. Mental health and teacher growth  
IV. Classroom organization

The analysis yielded twenty-four critical competencies. The largest number of behaviors fell in Area II, 45.9 per cent of the total. Area III accounted for 36.3 per cent of the total. Area

⁴⁹Knight, 96.
I accounted for 14.1 per cent of the total and Area IV accounted for 3.7 per cent of the total. To test the statistical significance of the relationship between the responses of teachers and consultants, the chi square statistic was used. Ord found that an analysis of the perception of consultants and teachers revealed that significant differences existed for two of the twelve critical competencies reported by both groups.50

Foster selected forty elementary supervisors and fifty elementary teachers to provide four descriptions of supervisory behavior. From the ninety interviews, 363 incidents were obtained. The following four major areas were derived from behaviors as constituting the critical areas of competencies:

I. Providing opportunities for acquiring inservice growth
II. Curriculum materials
III. Interpersonal relations
IV. Working with parents and parent groups

A total of 438 behaviors were found in the 363 incidents. The largest number, 54 per cent of the total, were found in Area I. Major Area III accounts for 28 per cent of the total. Major Area II accounted for 16 per cent of the total and Major Area IV accounted for only 7 behaviors or 2 per cent of the total number. The analysis yielded a total of twenty-four competencies, of which fourteen were perceived by both supervisors and teachers. Of the remaining ten competencies, supervisors perceived six of them critical, while teachers perceived four of them critical.

50Ord, 26-50.
Foster subjected the competencies to the chi square test and found there was no significant difference in the perception of competencies between the two groups.\footnote{Foster, 44-79.}

A more complete delineation of the critical competencies found in these three studies will be found in Chapter VI where a comparison will be made with the findings of the present study.

As indicated in Chapter I, the apparent lack of specificity in the current literature on the specific behavioral actions of major urban area consultants is the basis for the present study. It becomes evident that three studies from Stanford are the most closely related studies in the literature today.

**Non-Related Studies Which Have Utilized the Critical Incident Technique**

Since the critical incident technique is not widely known, it is well to review studies which appear in the literature. These non-related studies demonstrate the specificity of behavior which can be obtained from using the critical incident technique.

John C. Flanagan originally employed the critical incident technique in job analysis. He indicated that it was used in establishing critical requirements for bookkeepers, dentists, and United States Air Force officers. The early studies were for the purpose of refining the technique to demonstrate that the...
critical requirements of a job can be established through direct observation of personnel engaged in the activity.\textsuperscript{52}

Wagner obtained incidents from patients, dentists and dental school instructors in his study of critical requirements for dentists. From this study a number of proficiency tests for measuring ability with respect to certain critical requirements were developed.\textsuperscript{53}

Eilbert applied the critical incident technique to develop a functional definition of emotional immaturity. Fifty-one types of immature reactions were abstracted from 458 incidents reported by psychiatrists, psychologists, therapists, and nurses.\textsuperscript{54}

Teig used the technique for determining critical requirements for nursing practices.\textsuperscript{55}

As early as 1947 Flanagan advocated the use of the critical incident technique in the field of education to study the components of the school activity which are critical in the sense

\textsuperscript{52}John C. Flanagan, "Requirements in Employee Evaluation," \textit{Personnel Psychology}, II (Spring, 1949), 425.


that they have been demonstrated as making the difference between success and failure. An aptitude, ability or requirement for a particular activity which is crucial in the sense that it is a frequent factor causing either successful or unsuccessful participation is by definition a critical requirement for that activity. Flanagan believed that the critical requirements for various types of activities, when expressed in terms of behavior, become very useful for the development of procedures for evaluating effectiveness of performances in a specified activity. 56

Since 1951, several studies in education have utilized the Flanagan technique. From all indications the technique has great merit in the study of problems of educational research.

Barnhart used the critical incident technique to determine the critical requirements for school board membership. Barnhart concurred with Flanagan that the critical incident technique could be applied to any activity. 57

A similar study was carried out by Sternloff. He derived 128 requirements from school administrators and board members. 58

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Jensen reported a study sponsored by the American Council on Education. In this study more than 1500 critical incidents of teacher behavior were contributed by administrators, teachers, and teachers in training.\(^{59}\)

The University of Georgia, in research projects with the Cooperative Program of Educational Administration financed by the W. K. Kellogg Foundation, has established companion studies of the principalship. Six companion studies which have used the critical incident technique with different respondent groups have provided a thorough investigation of the critical requirements of the principalship. One of the studies was by Cooper who collected a total of 695 incidents from instructional supervisors in Georgia. She abstracted 764 behaviors and established twenty-six sub-areas which included 110 specific requirements. The main areas formulated were: (1) Development of Student Potential, (2) Utilizing Staff Capacities, (3) Guidance of the Community, (4) Coordination of Group Effort, (5) Administration of Instructional Program, (6) Conformity to Professional Standards.\(^{60}\)

Bradford carried out the critical incident research design in her study of the effective or ineffective performance of

\(^{59}\)Alfred C. Jensen, "Determining Critical Requirements for Teachers," *Journal of Experimental Education, XX* (September, 1951), 79-86.

the job of the secondary school principalship. A total of 521 incidents were gathered from superintendents, secondary school principals and teachers in three states. From these incidents 108 requirements were formulated under five major areas: (1) Implementation of Democratic Leadership, (2) Administration and Supervision of the Instructional Program, (3) Relations with Staff, (4) Relations with Pupils, (5) Relations with Parents.61

The supervisory behavior of principals was studied by Benjamin. Drawing upon incidents reported by teachers and principals which were limited to activities in the classroom, critical requirements were developed. Three major areas resulted from the study: (1) Mental Hygiene of Teachers, (2) Administrative Arrangements, (3) Curriculum Materials and Instructional Procedures.62

It is apparent from the preceding reports that the critical incident technique has been applied in an ever increasing variety of studies with success. The usefulness of such a tool in educational studies has been well demonstrated.


Summary

This chapter presented an account of the functional status and behavioral activity of the consultant or supervisor. Although many job titles exist for supervisory or consultant positions, there is sufficient agreement as to what services or activities are expected of the person holding such a position. The literature revealed that the consultant is called on to function in many different ways, but the most important way is the one-to-one relationship with teachers. In this relationship the literature has listed and described the many activities that are a part of the consultant's role. In commenting on the general literature describing supervisory activity, Harris presented the following:

Several decades of organized, specialized, supervisory practice in school situations have produced an array of supervisory activities. Such activities as classroom observation, interviews, demonstration teaching, lecturing and group discussions are all well known and widely used. The usefulness of these activities is not seriously questioned, yet little is known about the effectiveness of these and other activities. . . . 63

The work of various groups and independent researchers was reported in this chapter, but it was found wanting in terms of the present study. Harris, once again, commented on the lack of evidence in the field of supervision:

It is curious that we have little reliable evidence even on the fundamental nature of the work of "super-

63 Ben Harris, "Need for Research in Instructional Supervision," Educational Leadership, XXI (November, 1963), 131.
vision. Job analyses have been rarely undertaken... simple descriptions of supervisory behavior and sophisticated analyses of these descriptive data for a variety of personnel positions and situations could be most illuminating to the profession.64

It was seen in the literature that only a few studies were able to produce the kind of evidence that is necessary for determining the critical requirements for the job of curriculum consultant. These studies from Stanford University relied on the critical incident technique to produce reliable information. In commenting on the research regarding supervisory and curriculum procedures, Passow cited the need for just such a technique. "A paucity of technics and methods for attaining data may explain why much of the literature outlines programs and processes with relatively little supporting evidence."65

It was with this review of literature as background that the present study using the critical incident technique was undertaken to provide reliable information concerning the role of the curriculum consultant.

64Ibid., 133.

CHAPTER III

PROCEDURES FOR CONDUCTING THE INVESTIGATION

Introduction

The review of educational literature indicated a variety of methods for collecting data. Usually the questionnaire, checklist or rating scale was used. The purpose of the present study was to reveal the competencies needed by consultants. To accomplish this objective it was necessary to select a research design which would provide specific data regarding effective and ineffective behavior rather than generalized statements, and which would provide for arranging this data in such a manner that a formulation of competencies would be possible. For this study the critical incident technique was employed.

Presented in this chapter are: (1) an account of the critical incident technique and its procedures, (2) determination of the general aim of the curriculum consultant, (3) selection of the respondents, (4) development of the instrument, (5) the pilot study, (6) collection of data, (7) category formulation, (8) category validation, (9) summary.

Critical Incident Technique

The critical incident technique was developed by John C.
Flanagan. It has been summed up as follows:

It consists of a set of procedures for collecting direct observations of human behavior in such a way as to facilitate their potential usefulness in solving practical problems and developing broad psychological principles. The technique outlines procedures for collecting observed incidents having potential significance and meeting systematically defined criteria.¹

Rather than collecting opinions and hunches, the technique obtains a record of specific behavior. These behavioral incidents involve only behavior and represent objective data rather than subjective opinion. Such incidents are defined as behavior perceived as effective or ineffective with respect to attaining the general aim of the activity under consideration. Flanagan admitted that in the basic approach the technique does not represent a complete innovation in research because people have always made observations on other people. The critical incident technique establishes a set of procedures for analyzing and synthesizing observations.²

The technique itself was developed through studies in Aviation Psychology Programs in World War II. At the close of the war the American Institute for Research was set up by some of the psychologists who worked in the Air Force Program. The Institute carried out several developmental studies in an effort to refine the technique, and in 1947 the critical incident tech-

²Ibid., 327.
nique was given its present name. The first of these studies determined the critical requirements for the work of an officer in the Air Force. Another study was carried out to arrive at the critical requirements for an airline pilot. The Department of Psychology at the University of Pittsburgh conducted several studies using the critical incident technique. Some of this work was covered in the preceding chapter. Also pointed out in Chapter II are many studies which have been made of a variety of activities.

The advantages of the critical incident technique for use in this study are as follows:

1. It establishes a collection of descriptions of concrete, observable behavior in situations as perceived by the respondents.
2. It is a valuable technique which can be used empirically to identify perceptions of consultant competency by people associated with the activity.
3. It avoids abstract lists of general traits or qualities and provides descriptions of consultant practices on an operational level.

Although the advantages of the critical incident technique are many, certain limitations must be noted:

1. Teachers, consultants and principals must be considered as qualified to make judgements in reporting "effective" and "ineffective" behavior of the consultant.
2. Although the technique reveals behavior that makes the difference between success and failure in the activity, this behavioral element can only be expressed as a matter of degree rather than a fixed standard.
3. Subjectivity on the part of the researcher may enter into the categorization of incidents process. Al-

3Ibid., 329-331.
though a review board checks the formulation process, the result could be different from another researcher's viewpoint.

Based on the need for an investigation of the problem of this study and on a complete examination of use of this methodology of research, the critical incident technique was chosen for use in this study.

The procedures for the use of the critical incident technique are set up in five steps:

1. Determination of the general aim of the activity. This general aim should be obtained from authorities in the field. It should be a brief statement in simple terms which expresses those objectives on which most people would agree.
2. Development of plans and specifications for collecting data . . .
3. Collection of the data . . . In either case, it is essential that the reporting be objective and include all relevant details.
4. Analysis of the data. The purpose of this analysis is to summarize and describe the data.
5. Interpreting and reporting of the statements of the requirements of the activity. The research worker is responsible for not only pointing out the limitations but also the degree of credibility and the value of the final results obtained.  

Determination of General Aim

Flanagan said, "A basic condition necessary for any formulation of a functional description of an activity is a fundamental orientation in terms of the general aim of the activity." As indicated in the first procedural step, it was neces-

4Ibid., 354-355.
5Ibid., 336.
sary to secure the general aim or purpose of the elementary curriculum consultant from authorities in the field. Flanagan's sample form for use in obtaining a general aim was used (see Appendix A). The form was sent to five recognized authorities in the field of curriculum development and consultant activities in the United States; two professors of curriculum development and three assistant superintendents of schools who have responsibility for supervisory activities in their local school districts. The Associate Superintendent in Charge of Curriculum Development and the Director of the Department of Curriculum of the Chicago Public Schools and four elementary school principals were interviewed to be sure the views of local personnel, although not recognized as national authorities, were included. The response showed some variations in concepts because of different role conceptions of the elementary school consultant. The Chicago Public School personnel were in agreement as were three outstanding authorities, one professor and two superintendents, that the primary purpose of the elementary curriculum consultant in a major urban area is to improve instruction. The reactions of the other respondents were in indirect agreement with this purpose, but personal identification excluded their responses. It is unreasonable to expect complete agreement on a statement of this nature. However, for this study, a broad general aim which most experts and the related literature, as indicated in Chapter II, would agree on was sufficient. The primary concern was to pro-
vide respondents to this study with a common purpose so that each incident could be reported in terms of a common objective.

Therefore, in this study the purpose of the elementary curriculum consultant was formulated as follows:

The purpose of the elementary curriculum consultant is to improve instruction.

Selection of Respondents

Respondents were selected from teachers, principals, and consultants who were employed in the Chicago Public Schools. The teachers were selected at random from consultant reports of teachers who received curriculum consultant service on an individual basis. Individual basis is taken to mean the one-to-one relationship that occurs in the classroom or another part of the school building. It also includes a situation in which a consultant would meet with a small group of teachers for discussion or demonstration and then follow-up specifically with the respondent. Each school district within the Chicago Board of Education was covered in this sample. The principals were selected at random from the schools which received consultant service. Elementary consultants in the areas of Social Studies, Science, Language Arts, and Mathematics from the Department of Curriculum of the Chicago Public Schools were selected as participants in the study. All consultants were responsible for the improvement of instruction for various school districts in the Chicago Board of Education.
To determine the size of the sample, certain factors were considered. Studies which utilized the critical incident technique have had wide ranges in numbers of respondents and critical incidents. Flanagan indicated there is no one answer to the question of "how many." If the job or part of the job being considered is relatively simple, it may be satisfactory to collect only 50 or 100 incidents. Foster, in reviewing other studies, arrived at this conclusion regarding the number of incidents necessary:

A review of similar studies seemed to indicate that approximately one hundred respondents, with each respondent supplying four incidents, would be an adequate number to meet the requirements of this study.

Doing a similar review and following Foster's recommendation, it was determined that a minimum of four hundred incidents would be sufficient to provide adequate data.

Rather than using only one hundred respondents, each supplying four incidents, it was felt desirable to provide a much larger sampling because of the diversity of major urban area schools. Therefore, 550 teachers were selected at random from 800 names of teachers who had received consultant service on a one-to-one basis, each to provide one incident through interview or mailed response. All of the twenty elementary consultants

6Ibid., 343.

from the Department of Curriculum who were actively assigned to school districts were expected to provide up to twenty-five incident reports. One hundred principals whose teachers received consultant service were selected at random to provide at least one incident. It was anticipated that this sampling would provide at least the minimum four hundred incidents necessary to meet the requirements of this study.

**Development of the Instrument**

The development of the instrument met Flanagan's specifications for gathering data:

> The essence of the technique is that only simple types of judgements are required of the observer, reports from only qualified observers are included and all observations are evaluated by the observer in terms of an agreed upon statement of the purpose of the activity.\(^8\)

It is emphasized that the technique is not a single rigid set of rules governing data collection, but a flexible set of principles which must be modified to meet the specific situation at hand.\(^9\)

The instrument for teachers and principals was developed to insure understanding and accuracy of reporting. It included a cover letter, information sheets which gave a brief description of the technique and incident report forms. Careful instructions,

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\(^8\)Flanagan, *Psychological Bulletin*, LI, 335.

\(^9\)Ibid.
representative samples, and standards for evaluation were included (see Appendix B). The instrument for consultants followed the same general approach (see Appendix C).

**Pilot Study**

In order to refine the instruments, thus insuring their effectiveness, the material was given individually to three principals, fifteen teachers and two consultants. The pilot personnel filled out the forms and then studied them to suggest changes. No major changes were necessary. The incidents reported were reviewed by the researcher and were found to have fulfilled the requirements for accuracy in following directions and completeness of content. The adequacy of the instrument was established for use with the respondents.

**Collection of Data**

Four data gathering procedures have been used in the critical incident technique; group interview, individual interview, record form, and mailed questionnaire. For this study, three procedures were used; individual interview, group interview, and mailed questionnaire.

Although a pilot had been completed, it was felt that an additional check on reporting accuracy should be made. Individual interviews and group interviews were used at the beginning of the study because it was felt that these techniques have cer-
tained advantages over the questionnaire technique: (1) they allow personal contact for explanation and to answer questions, (2) they allow the interviewer to clarify any responses that do not seem clear. Securing critical incidents in this way gave the researcher the opportunity to establish a level of expectation for the mailed questionnaires in the future. Flanagan made reference to the fact that questionnaires for large samples are necessary and their results are not essentially different from interview results as long as the respondents read the instructions carefully and answer conscientiously.10 By later inspection of incoming mailed questionnaires, it was found that those questionnaires were of a quality comparable to those obtained from interviews.

Since the elementary curriculum consultants would be doing a large share of the reporting, a group meeting was held with the twenty consultants to present the reporting requirements. During this meeting:

1. The researcher secured their promise of cooperation and received their expression of willingness to participate in the study. The consultants were familiarized with the purpose of the study and methods that would be used in securing data.

2. The consultants were then familiarized with the reporting requirements expected of them and were asked to review the cover letter information sheet and consultant incident forms to determine if there was anything which needed clarification. The consultants were asked to provide up to twenty-five incidents that would occur as they

10Ibid., 343.
worked on a one-to-one basis with teachers. Each consultant was given a supply of incident report forms and stamped self-addressed envelopes to return the incidents to the researcher.

The random selection of teacher and principal respondents was made from current consultant reports. The 550 teachers were selected from 800 reports of individual consultant service. The 100 principals were selected from 150 schools visited. Most potential respondents received their questionnaire within eight days of consultant service or were interviewed within a three week period. Consultants reported their incidents within one week of occurrence.

Since this study was devised to allow for anonymous response, the follow-up procedure was expensive and time consuming. All persons who received a mailed questionnaire received a follow-up letter within one week of the original mailing (see Appendix D). A final follow-up letter was sent three weeks after the first follow-up letter to all original potential respondents (see Appendix E). It should be noted that many individuals placed return addresses or signed their names when returning the incident forms. This helped eliminate many follow-up letters.

The following table presents the results of the data collection.

The over-all reported incidents far exceeded the 400 incidents deemed sufficient for this study. Consultant incidents were fewer than anticipated because the press of central office responsibilities required that less in-the-field service could
After the data were obtained, it was necessary to determine their usability. A total of 825 incidents were checked for usability by the following criteria:

1. Was the incident recorded in terms of the criteria established for reporting?
2. Was the incident related to the purpose of the elementary curriculum consultant?
3. Was the incident sufficiently complete in detail?

Of the total number of incidents reported, only forty-seven were not usable. Of these forty-seven, twenty-two were not usable because the respondent confused a visit from the consultant in
Art and Music fields as a curriculum consultant visit. The remaining incidents were incomplete in detail.

When the unusable items had been removed, the classification process began. The incident reports were divided into two groups; one for effective behavior and one for ineffective behavior. After the two groups were established, each reported incident was analyzed to determine those incidents which contained more than one critical behavior. One hundred and four behaviors were added in this way. An additional incident report form was written up to record the extra 104 behaviors. Table 2 shows the data available for categorization.

**TABLE 2**

**FINAL DATA AVAILABLE FOR CATEGORIZATION**

<table>
<thead>
<tr>
<th></th>
<th>Teachers and Principals</th>
<th>Consultants</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incidents reported</td>
<td>513</td>
<td>312</td>
<td>825</td>
</tr>
<tr>
<td>Incidents not usable</td>
<td>39</td>
<td>8</td>
<td>47</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>474</strong></td>
<td><strong>304</strong></td>
<td><strong>778</strong></td>
</tr>
<tr>
<td>Behaviors analyzed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective</td>
<td>422</td>
<td>285</td>
<td>707</td>
</tr>
<tr>
<td>Ineffective</td>
<td>116</td>
<td>59</td>
<td>175</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>538</strong></td>
<td><strong>344</strong></td>
<td><strong>882</strong></td>
</tr>
</tbody>
</table>
At this point, one hundred of the cards were withdrawn in a random fashion and held out until final categories were developed.

The process known as category formulation was then undertaken. This is the total process by which the data are analyzed to arrive at the critical requirements for the job of curriculum consultant.

This categorization process is undertaken because it increases the utility and usefulness of the obtained data and does not lose the desired specificity. The 882 behaviors reported are the stated requirements for the position of curriculum consultant. There is only one reason for going into a categorization process, and that is practical utility. Flanagan said, "The purpose of data analysis stage is to summarize and describe the data in an efficient manner so that it can be effectively used for many practical purposes."\(^{11}\) The categories make it easier to report these requirements, to draw inferences from them, and to compare the activity with other activities.

The aim is to increase the usefulness of the data without sacrificing comprehensiveness. Three problems are involved: (1) selecting a frame of reference that will be useful for describing the incidents, (2) the inductive development of major areas and sub-areas, (3) selecting a level of specificity for reporting.

In classifying the incidents, consideration must be given to the use made of the data. This is called frame of reference.

\(^{11}\)Ibid., 343.
The preferred categories will be those believed to be most valuable in using the statement of requirements. Since the frame of reference of this study is for training uses or evaluating on-the-job effectiveness, the best classification system follows a set of headings that is easily related to training courses or easily learned by consultants.\textsuperscript{12}

In describing the categorization process, Ord\textsuperscript{13} cited Jensen's listing of the method to be followed:

1. Identification of the salient feature in each supervisory behavior reported; 2. derivation of a rough classification scheme to facilitate ordering of the data; 3. classification of each critical behavior under one of the categories set up in the previous step; 4. preparation of a descriptive statement covering each category of behavior and 5. refinement of the categories and preparation of a generalized descriptive statement for each.\textsuperscript{14}

The process for the present study followed the above steps.

Beginning in a random fashion, seventy-five incidents were drawn. Two were pulled from the group and reviewed to determine if they would fit in the same category. If they did not, the first incident became one category and the second incident became another category. A third incident was read; if it belonged in category one or two, it was so placed: if not, it became a base

\textsuperscript{12}\textit{Ibid.}, 344.


\textsuperscript{14}Alfred D. Jensen, "Determining Critical Requirements for Teachers," \textit{Journal of Experimental Education}, XX (September, 1951), 82.
for category three. Continuing, all identical behaviors were placed together with a very brief descriptive statement of the behavior involved to form the primary level of generalization. Next, groups of behavior that were relevant were isolated into separate groups with brief descriptive statements. This grouping provided eight tentative classes. The process described above was repeated, using the next seventy-five incidents and all remaining critical incidents. The eight groups were re-studied and reduced to three main areas for which general statements were written that embraced all behaviors in the group. The three main areas were:

I. Materials of Instruction
II. Methods of Instruction
III. Interpersonal Relationships

The next step in the process is most important. It is intended to refine incidents within their main areas. This process gave rise to categories and sub-categories. Flanagan has outlined a guide to be followed in this final step:

1. The headings and requirements should indicate a clear-cut and logical organization.
2. The titles should convey meanings in themselves without the necessity of detailed definitions, explanations or differentiation.
3. The list of requirements should be homogeneous, i.e., the headings for either areas or requirements should be parallel in content and structure.
4. Headings for major areas should be neutral, not defining either unsatisfactory or outstanding behaviors. Critical requirements should ordinarily be stated in positive terms...

15Flanagan, Psychological Bulletin, LI, 345.
The process of refinement produced twelve categories within the three main areas. A descriptive statement was written covering each category. A further refinement was made with each category. This refinement produced twenty-three behaviors for which a final descriptive statement was written. These statements constitute the critical requirements for the job of curriculum consultant. All headings and requirements are in accord with the four above mentioned steps. The complete delineation of the areas, categories, and requirements is found in Chapter IV.

In order to determine whether there was a large enough sample of incidents to provide sufficient data, the 100 incident reports from consultants, principals, and teachers which were withheld, were subjected to the category system which had been developed. This step follows Flanagan's recommendation:

For most purposes it can be considered that adequate coverage has been achieved when the addition of 100 critical incidents adds only two or three critical behaviors.16

It was found that subjecting these incidents resulted in only one additional behavior. The categories were judged comprehensive.

**Category Validation**

As a further check on the categorization process and to reduce the researcher's subjectivity, a review board of four

16Ibid., 343.
individuals; a professor of education, a head of a graduate school of education, a school principal who teaches graduate education and an experienced consultant, was selected. This board was asked to categorize a random sampling of descriptions of behavior which had already been categorized.

Electrostatically reproduced copies of fifty incident reports were given to the review board along with a copy of the areas and categories as determined by the researcher. The board was to study the researcher's categorization, read the descriptions of behavior, and place these in the area judged most valid for categorization. Each member completed his work independently. A summary of the findings may be found in Appendix F.

Analyzing the review board's findings revealed the agreement or disagreement which existed. A summary is presented in Table 3. There existed considerable agreement between the review board's categorization of the sample and the researcher's categorization. In thirty-five of the fifty cases all members agreed with the researcher; this was 68 per cent of the cases tested. Three of the four board members agreed in five other cases.

When the review panel's categorizations were completed, the disagreements were discussed with each member. The disagreements appeared to originate because of two factors: (1) an incident had two behaviors, (2) words used by the respondents were subject to different interpretations. In three incident reports where the reviewers disagreed with the researcher the wording of
TABLE 3

SUMMARY OF THE AMOUNT OF AGREEMENT BETWEEN REVIEW BOARD'S CATEGORIZATION OF FIFTY BEHAVIORS SELECTED AT RANDOM AND THE CATEGORIZATIONS OF THE RESEARCHER

<table>
<thead>
<tr>
<th>Reviewers</th>
<th>No. of Cases</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researcher and four review members agree.</td>
<td>34</td>
<td>68</td>
</tr>
<tr>
<td>Researcher and three review members agree.</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>Researcher and two review members agree, two members disagree, and are in disagreement.</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Researcher and one review member agree, three members disagree, and are in agreement.</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Researcher and four review members disagree and members are in agreement.</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Researcher and four review members disagree, but members are in disagreement.</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Researcher and two review members agree, two disagree, and are in agreement.</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Total</td>
<td>50</td>
<td>100</td>
</tr>
</tbody>
</table>

the category was changed to become more precise, but the category remained unchanged.

Other studies which have utilized the critical incident
technique frequently do not offer per cent of agreement, but state to the effect that the categories were sufficiently complete. The researcher considered the percentage of agreement reached in this study close enough to conclude that the criteria of objectivity had been observed in the classification process.

**Summary**

In this chapter an account of the critical incident technique was presented. The advantages of this technique for use in this study were described and a delineation of the Flanagan technique for securing incidents was made. All aspects of this technique were carefully followed in presenting the procedural techniques of the present study. An additional procedure was introduced to describe the validation of the researcher's categories by an independent review board.
CHAPTER IV

ANALYSIS AND INTERPRETATION OF THE DATA

Introduction

The categorization process described in Chapter III was used to develop statements of effective and ineffective critical actions of the elementary curriculum consultant. This process serves to answer the first question asked by the study:

What are the effective and ineffective behavior elements of the elementary curriculum consultant as observed by principals, teachers, and consultants?

Three major areas were derived from the behaviors obtained from consultants, teachers, and principals. These areas constitute the critical areas of work of the consultant. These areas are:

I. Materials of Instruction
II. Methods of Instruction
III. Interpersonal Relations

Comprising these major areas are a number of categories which were derived from the behaviors abstracted from the incidents. When considered together, these areas and sub-areas define the work of the elementary curriculum consultant. The following is a summary and brief explanation of these areas. Each category is illustrated by an incident. These incidents are from
teacher-principal reports and consultant reports. Effective and ineffective incidents are shown in each case.

**Major Areas and Categories of Consultant Behavior as Derived from Critical Incidents**

I. **Materials of Instruction**

In this area are listed those incidents which reflect consultant behavior as centered around the selection, provision and use of instructional instruments, instructional materials, manipulative materials, and other teaching aids.

A. **Demonstrates New Instructional Tools.** --This category concerns the demonstration of new or unfamiliar instructional tools and the necessary steps to be followed in proper utilization by teachers. The incidents reported by a consultant and a teacher are illustrations.

   **Effective**

   **Setting:** A meeting between the Assistant Principal and the consultant.
   **Incident:** I showed the Assistant Principal how he and his teachers could make appropriate use of the Opaque and Overhead Projectors in teaching social studies units. I explained how the teacher could use any important picture, chart, table, map or article and share it with the entire class by means of the projector.
   **Result:** The teacher was able to obtain an Opaque Projector, and she used it very effectively in her social studies class.

   **Ineffective**

   **Setting:** Equipment was available at our school which I was unsure how to use.
   **Incident:** At a workshop the consultant showed the teachers how to operate and manipulate equipment.
None. I, personally, had no practice, only observed, and so still lack manipulative confidence.

B. **Introduces New Instructional Materials.**--This category describes the consultant's competence in supplying the teacher with instructional material for study and use or assisting in the preparation of teaching aids. Following are reports from teachers.

**Effective**

**Setting:** A sixth grade Arithmetic class. Class lacked concrete materials to illustrate concepts simply and effectively.

**Incident:** Consultant showed how to construct home made materials adaptable to illustrate different concepts. An arithmetic "kit" of few simple materials applicable to year's course and interchangeable for presentation of different concepts in visual form.

**Result:** I constructed measurement board, new math chart, etc., fraction chart, etc., collectable in one small arithmetic kit handy for classroom use. Did same for Science kit. Materials much easier to use and are in one place.

**Ineffective**

**Setting:** A sixth grade science class. A need for a more interesting way to present material.

**Incident:** Consultant played science records. Science facts set to music. Very unusual sounding, to say the least. Class didn't know whether to laugh or not.

**Result:** Would not play them in my classroom. Sixth graders seem too sophisticated for this. Perhaps younger children would benefit.

C. **Recommends Appropriate Resource Material.**--This category describes the consultant's effectiveness in directing the teacher to a wide array of resource material; involves the consultant having a wide knowledge of materials and their availability. Reports from a consultant and a
Effective

Setting: A Kindergarten class. The teacher lacked materials about Japan to teach a social studies unit on Tokyo.
Incident: I pointed out to the teacher various resource materials from the Guide to the Social Studies that were available for use in the classroom. I directed her attention to the supplementary books and stories, films, filmstrips, as well as pictures and illustrative materials obtainable from the Japanese Consulate, the Japanese Tourist Bureau and other sources.
Result: The teacher was able to locate the materials she needed for her unit on Tokyo and thanked me for helping her find them.

Ineffective

Setting: A third grade science class. This class was having difficulty visualizing mountainous areas, huge rocks and boulders, gaping quarries. I felt that some experiential activity was needed for these children.
Incident: The consultant made a notation to send me resource information and field trip sites information. The consultant did not volunteer any suggestions for resource, presentation or aids.
Result: No reply has been received concerning my request. I have provided a large amount of pictorial material and rock samples that I have secured. I feel, however, that the classroom aids are not sufficiently adequate.

D. Aids the Teacher to Make Best Use of Curriculum Guides.---

This category involves the consultant's assistance in explaining and adapting the over-all curriculum program to the specific needs of a particular student body and particular teacher. Reports from teachers illustrate this category.

Effective

Setting: A primary classroom that has first and second year students enrolled in a continuous development pro-
gram. The middle first year students have been placed in a room with the lower group of second year students. This group needs challenging materials in social studies. A new guide has been published.

**Incident:** The new guide had just come out, and I had begun to use it in teaching social studies. The consultant came to my room and told me how extensive the guide was. We went through it together, and she pointed out many things that I hadn't discovered.

**Result:** After her visit I was able to plan my units more extensively. We have done many rewarding and inspiring things that were suggested in the guide.

**Ineffective**

**Setting:** A sixth grade science class. A new teacher and a very slow group of pupils.

**Incident:** The consultant visited my room. He suggested that I follow the guide directly in teaching this class and that this would stimulate the class more.

**Result:** I followed this method, and I still did not make any real progress in stimulating this group.

II. **Methods of Instruction**

In this area are listed those incidents that reflect consultant behavior as centered around the teaching techniques necessary for the improvement of instruction. The area also includes the consultant's role suggesting organizational changes.

A. **Demonstrates Appropriate Instructional Techniques.**--This category includes the demonstration of a useful instructional technique for which the teacher recognizes a need. Provision is made for cooperative evaluation between teacher and consultant. The incidents reported by a teacher and a consultant are illustrations.
Effective

Setting: A sixth grade English class. I was having difficulty stimulating an interest in improved sentence writing.
Incident: I witnessed a demonstration by a language arts consultant. In the demonstration, the idea of using a cigar box filled with sundry articles to encourage sentence writing was discussed.
Result: The children showed a renewed interest in sentence writing and showed imagination in identifying the various articles.

Ineffective

Setting: A fourth grade class. At the request of the principal the consultant was to give a demonstration lesson in science.
Incident: The children were involved in a series of simple experiments which illustrated the three states of matter.
Result: The teacher commented that the children were attentive only because the consultant was a visitor, but that ordinarily they would only behave when they read from their texts.

B. Assists Teacher in Organization of Classroom Program.--

This category includes the involvement of the consultant in planning and organizing the classroom's physical environment and planning and organizing lessons, units, time schedules, and procedures of routine. The incidents reported by teachers are illustrations.

Effective

Setting: Seventh grade science class starting a program of team teaching. Three classes were assembled twice a week in the auditorium. Class was held in the regular classrooms the other three days of the week. Each teacher on the team was to teach a unit and was given a certain amount of time to complete it. I was unable to complete my lessons going at a normal speed. Therefore I increased my speed slightly and was able to finish.
Incident: The consultant suggested that I never rush.
He helped me with the timing of my lessons and explained that the children would probably learn more if I were to eliminate some of the content of my unit. He showed the importance of covering the main concepts of a unit and suggested ways of making the lessons more interesting. Result: I was able to develop more interesting lessons. My test results as well as classroom discussions indicated an improvement in my teaching.

Ineffective

Setting: 2nd grade - Primary II - 36 pupils.
Incident: Consultant wanted to set up activity centers as shown in the supplement. Her ideas were good, but we can't use the centers because we have permanent seats. Children aren't to move around.
Result: None. The centers aren't suitable for our children.

C. Works With Teachers to Improve Instructional Techniques.--This category involves the consultant as the expert in suggesting a wide variety of instructional techniques and having the ability to provide concrete samples and illustrations. The incidents reported by a consultant and a teacher are illustrations.

Effective

Setting: A fourth grade class of pupils who were interested in devoting a segment of reading program to an intensive investigation of study skills. The teacher wanted to begin with the encyclopedia.
Incident: Consultant suggested that the table of contents of various textbooks was a good starting point. Consultant demonstrated with the group of children and presented a lesson on the table of contents of the basic reader. Then the consultant outlined a follow-up study-skills program for the particular group of children. It was suggested that the introduction to the encyclopedia be delayed until 5th grade.
Result: Teacher expressed thanks and took copious notes. "Now-I-know-where-I'm-going" was the feeling engendered.
Ineffective

Setting: The teacher of a fifth grade homogeneously grouped reading class of second grade level readers was having difficulty in teaching phonics skills. The class could not apply the skills being taught.

Incident: The consultant visited the class. She referred the teacher to the new language arts guide and explained several techniques. The teacher was already familiar with the guide and had used the techniques.

Result: Neither the teacher nor the class had been helped. The teacher hoped that the consultant would either teach a class as a demonstration or observe the teacher's methods and offer criticism.

D. Evaluates Teaching Techniques.—This category includes the consultant as an evaluator of the teacher's method or technique of instruction. This evaluation is arrived at cooperatively. The incidents reported by consultants are illustrations.

Effective

Setting: Grade 6. Culturally disadvantaged average children. The school's instructional problem was oral communication and the teacher was concerned with the substandard dialect of the children. Her questions: "How much emphasis should be placed on articulation and pronunciation? How do I go about this problem of substandard speech?"

Incident: The consultant spent forty minutes ascertaining the pupils' needs, setting guidelines for a program in speech improvement and offering specific suggestions for teaching techniques.

Result: Teacher commented that at last she knew "where to begin and how to proceed."

Ineffective

Setting: A fourth grade room visited during the science period. (The science consultant had been asked by the principal to observe the classroom teacher's procedure and techniques.)

Incident: The classroom teacher had one child at a time give a report on a pre-planned topic.
Result: There was no time for a teacher-consultant conference and no evidence that the teacher was interested in having one.

E. **Arranges Opportunities for Teacher to Observe Other Class Situations.** This category includes the arrangement of opportunities for teachers to visit other classrooms and helps them receive maximum benefit from these opportunities. The incidents reported by a teacher and a consultant are illustrations.

**Effective**

**Setting:** I am a new teacher in 8th grade. Committee work was almost impossible. One A.M. the consultant came in.

**Incident:** He had some real good ideas. Better yet, he asked if I would like to see a demonstration in another room. That afternoon the librarian covered the class, and we saw the 8th grade teacher do committee work.

**Result:** This was a fine opportunity to see an outstanding teacher develop group work.

**Ineffective**

**Setting:** During the course of a full morning visit with a newly assigned grade two teacher, it became apparent that one helpful activity would be a visit to another classroom to observe how meaningful seatwork is carried on while a reading group occupies the teacher's attention.

**Incident:** I suggested to the teacher that arrangements would be made through the principal for an observation visit.

**Result:** When I returned to the school a few weeks later, I discussed with the teacher any new ideas which came from the visit. The teacher felt that the other teacher's success was due largely to the behavior of the class and not the seatwork.

**III. Interpersonal Relations**

In this area are listed those incidents which reflect consultant behavior as centered around the way the consultant
builds feelings of confidence and security, understands the teacher's problems, becomes an interested participant in the classroom program, and provides recognition for teacher accomplishment.

A. Determines Teacher Needs and Sets Purpose of Visitation.--This category concerns the consultant's approach to the teacher, his concern for the teacher's schedule, showing interest in the teacher's problem, and identifying in a cooperative manner what service can be effectively rendered. The incidents reported by teachers are illustrations.

**Effective**

Setting: A fourth grade class consisting of children who were grouped homogeneously but were in too many arithmetic groups. The consultant was asked to visit my room after the 8:30 meeting. Consultant came to me before recess period.

Incident: She suggested that we talk during recess break. Consultant asked what I wanted her to do. We discussed the problem. She suggested that she work with each group for a short period of time. After this work, we would look over the latest Metropolitan test scores and attempt to solve the problem of grouping.

Result: Visit was a definite success. We worked together for the remainder of the morning. By the time she left we had solved the problem and the class is functioning at a much more efficient level.

**Ineffective**

Setting: Principal sent the social studies consultant to my room. This is a 4th grade room.

Incident: During the fifteen minutes the consultant stayed with me, all I found out was that new materials are available for teachers.

Result: Visit was very unsatisfactory because all the new materials and useless suggestions are of no value unless the pupil understands the textbook.
B. Improves Morale Through Acknowledgement of Teacher's Effort.--This category concerns the consultant's building teacher confidence in the effectiveness of her techniques and effort, commenting about specific accomplishments, and aiding the teacher in receiving credit for her work. The incidents reported by teachers are illustrations.

Effective

Setting: Eighth grade social studies class. With the coming of a new principal, the teacher became upset for it seemed the principal didn't like the way the work was being done and felt that too much time was given to the teaching of the Constitution.

Incident: The social studies consultant twice visited the class in the Auditorium where the Constitution was being taught.

Result: Both times the consultant reassured the teacher that the efforts the teacher put forth were bringing very good results. He stated that teaching the Constitution this way gave it dignity and made it stand out as something very important in the curriculum. He said it was evident the students were eager to learn about the Constitution in the way it was presented and he felt that they acquired a good understanding of it. The best thing about the consultant's visits was that the teacher was given assurance, and that helped the teacher to carry on and try harder to do a still better job.

Ineffective

Setting: A third grade class and the consultant asked if she could come in to observe.

Incident: The class worked in different groups on individual assignments; one group with me. She walked around the room and talked to the pupils.

Result: At the end of the class she said, "It was nice." I don't think she was satisfied with what she saw.
C. Shows Interest in Pupils' Work and Joins in Classroom Activities.--This category concerns the consultant's interest in the work of the pupils and the consultant's willingness to become an active participant with the pupils in the on-going classroom activities. The incidents reported by teachers are illustrations.

**Effective**

**Setting:** 5th grade class putting on a trip through the Western States.

**Incident:** The consultant who talked to us at 8:30 came in to see the program. She knew several songs of the old West and asked if she could tell the boys and girls how they came to be written.

**Result:** Before we realized what was going on, the consultant was joining with our trip. Kids and I loved it.

**Ineffective**

**Setting:** This consultant had worked with our grade level teachers. She came in my room of grade 6 pupils during an A-V movie on China.

**Incident:** Consultant talked with me while the movie was on and said she would take over after the movie was over.

**Result:** She took over but it was not effective because the pupils were expecting a follow-up of what we talked about before the movie. I couldn't understand what the consultant had hoped to accomplish during this interaction with pupils. I was completely unaware of her intentions.

**Analysis and Classification of Incidents**

The following outline presents in tabular fashion the 882 abstracted behaviors and the derived categories. The classification process resulted in three major areas and twelve categories. The largest number of behaviors, 341, were found in Area I.
Area II accounted for 310 behaviors and Area III accounted for 231 behaviors. Presented in the outline are the critical requirements for the elementary curriculum consultant. This outline shows the number of effective and ineffective behaviors which were inductively analyzed to produce the critical requirements. Rather than merely listing the number of effective and ineffective behaviors comprising each critical requirement, an attempt is made to illustrate the ineffective behavior along with the effective behavior. Therefore, the outline serves a dual purpose in that it calls attention to the behavior that should also be avoided by the curriculum consultant.

**Classification of Incidents Into Critical Requirements as Reported by Respondents**

I. Materials of Instruction

<table>
<thead>
<tr>
<th>A. Demonstrates New Instructional Tools</th>
<th>Frequency of mention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective: Demonstrates new instru-</td>
<td>Prin. and Teachers</td>
</tr>
<tr>
<td>ments of instruction and involves the</td>
<td>33</td>
</tr>
<tr>
<td>teacher in their use.</td>
<td>3</td>
</tr>
<tr>
<td>Ineffective: Fails to give the teacher</td>
<td>SUB-TOTAL</td>
</tr>
<tr>
<td>an opportunity to become acquainted</td>
<td></td>
</tr>
<tr>
<td>with the instrument in its actual use.</td>
<td></td>
</tr>
</tbody>
</table>

B. Introduces New Instructional Materials

1. Effective: Provides actual instructional materials for the teacher to study, use, and evaluate. 54 21
C. \textbf{Recommends Appropriate Resource Materials}

\textbf{Effective:} Recommends available resource materials to meet teacher needs.
\textbf{Ineffective:} Does not offer suggestions for appropriate resource materials.

\begin{tabular}{lcc}
\hline
& Prin. and Teachers & Consultants \\
\hline
Effective: & 34 & 17 \\
Ineffective: & 3 & 5 \\
\hline
\textbf{SUB-TOTAL} & 37 & 22 \\
\end{tabular}

D. \textbf{Aids the Teacher to Make the Best Use of Curriculum Guides}

1. \textbf{Effective:} Helps the teacher adapt curriculum guides to classroom situations.
\textbf{Ineffective:} Does not relate teaching guide to actual classroom situations.

\begin{tabular}{lcc}
\hline
& Prin. and Teachers & Consultants \\
\hline
Effective: & 29 & 18 \\
Ineffective: & 5 & 3 \\
\hline
\textbf{SUB-TOTAL} & 34 & 21 \\
\end{tabular}

2. \textbf{Effective:} Explains use of guide and points out specific features.
\textbf{Ineffective:} Fails to provide a detailed description of the guide.

\begin{tabular}{lcc}
\hline
& Prin. and Teachers & Consultants \\
\hline
Effective: & 25 & 20 \\
Ineffective: & 3 & 4 \\
\hline
\textbf{SUB-TOTAL} & 58 & 44 \\
\end{tabular}

\textbf{TOTAL -- AREA I} 220 121
II. Methods of Instruction

A. Demonstrates Appropriate Instructional Techniques

<table>
<thead>
<tr>
<th>Frequency of mention</th>
<th>Prin. and Teachers</th>
<th>Consultants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Effective: Provides a demonstration of a useful instructional technique.</td>
<td>26</td>
<td>39</td>
</tr>
<tr>
<td>Ineffective: Provides a demonstration of an instructional technique for which teacher does not feel any need.</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>2. Effective: Engages in cooperative evaluation with the teacher of the demonstration lesson to insure teacher understanding.</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Ineffective: Does not evaluate the demonstration lesson with the teacher.</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td><strong>SUB-TOTAL</strong></td>
<td><strong>39</strong></td>
<td><strong>48</strong></td>
</tr>
</tbody>
</table>

B. Assists Teacher in Organization of Classroom Program

<table>
<thead>
<tr>
<th>Frequency of mention</th>
<th>Prin. and Teachers</th>
<th>Consultants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Effective: Helps the teacher make more productive use of classroom's physical environment.</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>Ineffective: Criticizes use of classroom environment but does not suggest and assist in more productive use.</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>2. Effective: Helps teacher to plan and organize the classroom program.</td>
<td>28</td>
<td>18</td>
</tr>
<tr>
<td>Ineffective: Suggests changes that teacher is not ready to accept.</td>
<td>11</td>
<td>13</td>
</tr>
<tr>
<td><strong>SUB-TOTAL</strong></td>
<td><strong>53</strong></td>
<td><strong>43</strong></td>
</tr>
</tbody>
</table>

C. Works With Teachers to Improve Instructional Techniques

<table>
<thead>
<tr>
<th>Frequency of mention</th>
<th>Prin. and Teachers</th>
<th>Consultants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Effective: Suggests various instructional techniques to the teacher.</td>
<td>29</td>
<td>19</td>
</tr>
</tbody>
</table>
**III. Interpersonal Relations**

**A. Determines Teacher Needs and Sets Purpose of Visitation**

1. **Effective:** Cooperatively determines what can be of assistance to the teacher.
   - **Ineffective:** Hurries through visitation without determining teacher needs.

**Frequency of mention**

<table>
<thead>
<tr>
<th></th>
<th>Prin. and Teachers</th>
<th>Consultants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Effective</td>
<td>29</td>
<td>9</td>
</tr>
<tr>
<td>1. Ineffective</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>Sub-total</td>
<td>37</td>
<td>12</td>
</tr>
</tbody>
</table>
2. Effective: Establishes friendly rapport with the teacher.  
Ineffective: Fails to establish friendly rapport.

3. Effective: Acts as a listener for teacher problems and complaints.  
Ineffective: Fails to show interest in teacher's complaints.

4. Effective: Visits the teachers at an opportune time and does not interfere with work of the class.  
Ineffective: Interrupts ongoing classroom activities.

SUB-TOTAL

B. Improves Morale Through Acknowledgement of Teacher Effort

1. Effective: Builds teacher confidence in the effectiveness of her techniques and effort.  
Ineffective: Fails to provide assurance regarding value of teacher's work.

2. Effective: Comments enthusiastically about specific teacher accomplishments.  
Ineffective: Fails to show appreciation of specific teacher accomplishments.

3. Effective: Cites specific achievements of the teacher in the classroom to the principal.  
Ineffective: Fails to credit teacher for special achievement.

SUB-TOTAL

<table>
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<tr>
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<td>Prin. and Teachers</td>
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C. Shows Interest in Pupils' Work and Joins in Classroom Activities

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<th>Frequency of mention</th>
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<tr>
<td>Prin. and Teachers</td>
<td>Consultants</td>
<td></td>
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</table>

1. **Effective:** Indicates interest in pupils' work.
   - Ineffective: Fails to show interest in pupils' work.
   - Effective: Indicates interest in pupils' work.
   - Ineffective: Fails to show interest in pupils' work.

2. **Effective:** Becomes an active participant in classroom program.
   - Ineffective: Tries to dominate classroom activities.

SUB-TOTAL 16 16

TOTAL -- AREA III 141 90

TOTAL -- AREA I, II, III 538 344

**Determination of Critical Requirements**

The second question that this study attempted to answer was:

What are the critical requirements for the job of elementary curriculum consultant?

The critical requirements for the elementary curriculum consultant were inductively developed from the related behaviors. A critical requirement, as the term is used here, refers to any observable behavior or activity that may make the difference between success and failure in the improvement of instruction. Behaviors were considered critical only when the type of behavior was reported in both its positive and negative aspects by respondents from the same group.
The statements of critical requirements of the elementary curriculum consultant are presented along with an indication of which respondent group perceived it to be critical. As an example, the statement I.A., "Demonstrates new instruments of instruction and involves the teacher in its use," was perceived to be critical by both teachers and consultants. The statement I.B.2., "Assists teacher in the physical preparation of teaching aids," was perceived to be a critical behavior by teachers, but not by consultants.

The analysis of the statements yielded twenty-three competencies. Consultants perceived one, teachers and principals perceived eight, and fourteen were perceived by principals and teachers and consultants.

The total list of perceived critical requirements for elementary curriculum consultants is as follows:

I. Materials of Instruction

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<td><strong>T</strong></td>
<td><strong>C</strong></td>
</tr>
<tr>
<td>1. Demonstrates new instruments of instruction and involves the teacher in its use.</td>
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<tr>
<td>2. Provides actual instructional materials for the teacher to study, use, and evaluate.</td>
<td>X</td>
</tr>
<tr>
<td>3. Assists teacher in physical preparation of teaching aids.</td>
<td>X</td>
</tr>
<tr>
<td>4. Recommends available resource materials to meet teacher needs.</td>
<td>X</td>
</tr>
<tr>
<td>5. Helps the teacher adapt curriculum guides to classroom situations.</td>
<td>X</td>
</tr>
<tr>
<td>6. Explains use of guide and points out specific features.</td>
<td>X</td>
</tr>
</tbody>
</table>

* "T" refers to requirement perceived by teachers and principals. "C" refers to requirement perceived by consultants.
II. Methods of Instruction

1. Provides a demonstration of a useful instructional technique.  
   T  C
   X  X

2. Engages in cooperative evaluation with the teacher of the demonstration lesson to insure teacher understanding.  
   X

3. Helps the teacher make more productive use of classroom's physical environment.  
   X  X

4. Helps teacher to plan and organize the classroom program.  
   X  X

5. Suggests various instructional techniques to the teacher.  
   X  X

6. Accompanies suggested techniques with concrete examples and illustrations.  
   X

7. Evaluates the teacher's instructional techniques at teacher's request.  
   X

8. Arranges for teacher to observe instructional techniques which would be of help.  
   X  X

III. Interpersonal Relations

1. Cooperatively determines what can be of assistance to the teacher.  
   T  C
   X  X

2. Establishes friendly rapport with the teacher.  
   X  X

3. Acts as a listener for teacher problems and complaints.  
   X

4. Visits the teachers at an opportune time and does not interfere with work of the class.  
   X  X

5. Builds teacher confidence in the effectiveness of her techniques and effort.  
   X  X

6. Comments enthusiastically about specific teacher's accomplishments.  
   X

7. Cites specific achievements of the teacher in the classroom to the principal.  
   X

8. Indicates interest in pupils' work.  
   X

9. Becomes an active participant in classroom program.  
   X

Having distinguished the critical requirements from each respondent group, the following is an elaboration of each requirement with particular emphasis placed on the critical element in each requirement.
Critical Requirements of Elementary Consultants

As Perceived By Both Teacher-Principal Respondents and Consultants

Demonstrates new instruments of instruction and involves the teacher in its use.--The consultant works with the teacher in demonstrating new instruments of instruction. These instruments include audio-visual equipment, science equipment, and the vast array of projection devices available to teachers. Not only does the consultant demonstrate these instruments, he outlines proper steps to be followed in their utilization. The ineffective behavior is the failure of the consultant to allow the teacher the time and opportunity to work with the equipment.

The critical element is affording the teacher the actual practice of working with the instrument.

Provides actual instructional materials for the teacher to study, use, and evaluate.--The consultant endeavors to provide appropriate instructional materials for the classroom program. The materials would consist of textbooks, workbooks, worksheets, and related printed material. The unsuccessful behavior is providing unsuitable materials which the teacher cannot use.

The critical element is the determination by the consultant that the materials are well suited for a particular learning situation.

Recommends available resource materials to meet teacher needs.--The consultant must be ready to meet requests for sug-
gesting resource materials which are of a free or inexpensive nature. These materials are considered as supplementary to ordinary instructional material. The ineffective behavior is failure to offer suggestions when requested.

The critical element is the consultant's knowledge of the vast resource material which is available for teacher selection.

**Helps teacher adapt curriculum guide to classroom situation.**—The consultant works with the teacher in formulating specific classroom adaptations of the curriculum. The ineffective aspect of the requirement is the failure to relate the guide to the particular needs of the teacher.

The critical element is the consultant's recognition that the curriculum guide must be adapted to the classroom situation as perceived by the teacher.

**Explains use of curriculum guide and points out specific features.**—The consultant is called on to explain the curriculum guide. In this explanation the consultant must be certain to cover all its important aspects. It cannot be assumed that teachers will automatically accept the guide. The unsuccessful behavior is the failure to explore specific features.

The critical element is the necessity for detailed description and elucidation of the total guide.

**Provides a demonstration of a useful instructional technique.**—The consultant demonstrates a variety of instructional techniques. These demonstrations may be teacher or consultant
initiated. The unsuccessful behavior is demonstrating a technique for which the teacher fails to see any need.

The critical element is the consultant's awareness of carefully exploring a request for a demonstration before its presentation.

**Helps the teacher make more productive use of classroom's physical environment.**--The consultant guides the teacher in making better use of existing classroom facilities. He assists the teacher in selecting and arranging physical elements in the classroom to provide a more attractive and functional learning environment. The unsuccessful behavior is criticizing an existing situation and not helping in a recommended change.

The critical element is the consultant's cooperatively working with the teacher to produce the desired changes.

**Helps teacher to plan and organize the classroom program.**--The consultant aids the teacher in preparing lesson plans, organizing pupil grouping, and arranging time schedules. The unsuccessful behavior is suggesting changes in the established program that the teacher is not ready to accept.

The critical element is that the consultant determines the teacher's readiness for change and does not attempt to force the teacher to change.

**Arranges for teacher to observe instructional techniques which would be of help.**--The consultant determines that a means for teacher growth can best be provided by observation in another
teacher's classroom. He arranges for the teacher to make the observa-
tion. The ineffective behavior is the failure of the con-
sultant to point out specific points of observation.

The critical element is the consultant's preparing the teacher for the specific techniques which are to be observed during the visitation.

**Cooperatively determines what can be of assistance to the teacher.**--The consultant cooperatively establishes what purpose the consultant's visit can best serve. The ineffective element is the consultant's hurrying through a visit without an adequate awareness of teacher needs.

The critical element is the consultant's willingness to approach a classroom visitation without a predetermined approach to what can or cannot be done.

**Establishes friendly rapport with the teacher.**--The consultant establishes a friendly rapport with the teacher in an informal manner before initiating any direct consultant service. The ineffective behavior is the failure of the consultant to establish rapport.

The critical element is the consultant's recognition that an effort at establishing rapport must be attempted before rendering service.

**Visits the teacher at an opportune time and does not interfere with work of the class.**--The consultant does not disturb the class and the teacher when they are involved in an on-going
activity. The ineffective behavior is interrupting the class or not waiting until the teacher is available to devote her complete attention to the consultant.

The critical element is the consultant's recognition of the teacher's planned activities and the need for arranging a visit to fit the teacher's schedule.

Builds teacher confidence in the effectiveness of her techniques and efforts. -- The consultant must consciously reassure the teacher that her work and performance is satisfactory. The ineffective behavior is to consciously or unconsciously fail to provide necessary reassurance.

The critical element is the building of teacher confidence through reassuring the teacher that her work is satisfactory.

Suggests various instructional techniques to the teacher. -- The consultant makes suggestions concerning the wide area of instructional technique, from presenting authentic problems on a chalk board to conducting oral discussion. The ineffective behavior is to suggest a technique which is not new to the teacher.

The critical element is the consultant's flexibility in suggesting techniques which are new or are different for the teacher to try.

As Perceived by Teachers and Principals

Assists teacher in physical preparation of teaching aids. -- The consultant works with the teacher in the actual construction or fabrication of teaching aids. The ineffective be-
behavior is failing to assist the teacher in the necessary preparation.

The critical element is the consultant's willingness to develop an aid that was suggested for use in the classroom.

Engages in cooperative evaluation with the teacher of the demonstration lesson to insure teacher understanding. Following a demonstration lesson the consultant makes certain that the teacher has the opportunity to discuss what was learned from the lesson. The ineffective behavior is to disregard a follow-up of the lesson.

The critical element is to insure teacher understanding of the purpose and effect of the demonstration.

Accompanies suggested techniques with concrete examples and illustrations. The consultant, in suggesting techniques to the teacher, avoids meaningless phrases and presents concrete illustrations that apply specifically to the problem under consideration. The ineffective behavior is the consultant's suggestion of techniques without specific examples to assist in effective follow through.

The critical element is that the consultant's suggestions must avoid being vague or lacking in specificity.

Evaluates the teacher's instructional techniques at teacher's request. The consultant, upon request by the teacher, evaluates general or specific teaching techniques used by the teacher. The ineffective behavior is to attempt an evaluation
without teacher's concurrence.

The critical element is in the consultant's avoiding an evaluation of the teacher's instructional techniques unless requested by the teacher.

Comments enthusiastically about specific teacher accomplishments.--The consultant's comments regarding teacher accomplishments are important in providing recognition which satisfies the teacher's need for personal recognition. The ineffective behavior is illustrated by the consultant's lack of appreciation for teacher's accomplishments.

The critical element is the degree of interest which the consultant shows in certain phases of the teacher's work in which the teacher feels pride.

Cites specific achievements of the teacher in the classroom to the principal.--The consultant affords recognition of the teacher's work whenever possible. The teacher gains stature by this consultant action. The ineffective behavior is failure to credit the teacher to the principal for special achievements.

The critical element is the consultant's efforts to afford recognition of teacher's work whenever possible.

Indicates interest in pupils' work.--The consultant, when visiting the classroom, takes the opportunity to show interest in the pupils' activities and on-going work. The ineffective behavior is the consultant's failure to show interest in the pupils' work.
The critical element is the degree of interest the consultant shows in pupils' work.

**Becomes an active participant in the classroom program.**—

The consultant in the course of classroom visitation becomes actively involved in on-going classroom activities by joining with the students in class projects. The ineffective behavior is the consultant trying to impose himself on the classroom program or trying to dominate classroom activities.

The critical element is the consultant's willingness to join with pupils in a classroom program at the opportune time.

**As Perceived by Consultants**

**Acts as a listener for teacher problems and complaints.**—

The consultant listens sympathetically to various teacher problems and complaints. The consultant serves as a person in whom the teacher can occasionally confide and to whom he can relate instructional and personal problems. The ineffective behavior is the consultant's refusal to listen to a teacher's problem or complaint.

The critical element is the consultant's willingness, or display of willingness, to listen to the teacher's problems.

**Summary**

The analysis of the incidents through a categorization process yielded twenty-three competencies or requirements for the job of elementary curriculum consultant. A critical requirement
refers to any observable behavior that may make the difference between success and failure in the improvement of instruction. These competencies were considered critical when one respondent group reported the competency in both its positive and negative aspects. An analysis of the statements revealed that fourteen competencies were perceived by principals and teachers and consultants. Eight competencies were perceived by only teachers and principals, and one by consultants.

Each requirement was elaborated on in the text discussion. The statement of these requirements provides the necessary job requirements that a consultant should possess as he carries on consultant service on an individual basis with teachers. In presenting the critical requirements for the elementary curriculum consultant this study has not attempted to order the critical requirements according to relative importance. Each requirement must be considered in terms of its own uniqueness.

The requirements which were determined by this study will be compared to the requirements from similar studies in Chapter VI.
CHAPTER V

STATISTICAL TEST OF ONE MAJOR HYPOTHESIS

Having arrived at twenty-three critical requirements from the reports of the respondent groups, teachers and principals, and consultants, it was deemed important that some method be used to determine if any of these competencies were being viewed in the same way by the two groups.

In order to estimate the extent to which these two groups did view these competencies, a statistical test of relationship was selected. Because of the small number of cases involved, twenty-three, it was decided that the Spearman rho technique would be appropriate. The Pearson Product Moment Coefficient is the more commonly used method of relationship, as Guilford points out, but when samples are small a common procedure is Spearman's rank difference method.¹

Furthermore, it was necessary to determine if the degree of relationship was of statistical significance. Statistical significance in this context means that there is a very small probability that the coefficient of correlation obtained in this

study is a chance deviation from a population correlation of zero. A null hypothesis was set up and tested by Spearman's rank order correlation technique. This hypothesis was:

There is no significant difference between the perceived critical competencies of consultants as they are perceived by consultants themselves and as they are perceived by principals and teachers.

In establishing a table for use in the correlation technique it is necessary to draw upon the data presented in Chapter IV. This data was presented in a summary fashion. It was drawn from the critical incidents as reported by teachers, principals and consultants. From these incidents were developed the critical competencies or requirements for the job of curriculum consultant. Twenty-three requirements were presented in Chapter IV, pages 82 and 83. These requirements are designated as numbers 1-23 in Table 4. The following steps were taken in the determining of the rho coefficient:

1. Ranking the teacher, principal responses from highest to lowest. These were called R₁. The number of responses for each requirement was presented on pages 76-81 and are summarized in Appendix G.
2. Ranking the consultant responses from highest to lowest. These were called R₂. The number of consultant responses is summarized in Appendix G.
3. For each pair of ranks for each competency the difference in ranks was determined.
4. Each difference was squared to find D².
5. The square of the differences was summed.
6. The coefficient, Greek letter rho, was determined by means of the formula

\[ r = \frac{1 - \frac{\sum D^2}{N(N^2 - 1)}}{N(N^2 - 1)} \]

\[ ^2 \text{Ibid., 306.} \]
TABLE 4

RANK DIFFERENCE CORRELATION BETWEEN THE RESPONSES OF TEACHERS-PRINCIPALS AND CONSULTANTS TO THE 23 DERIVED CRITICAL COMPETENCIES

<table>
<thead>
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<th>Critical Competency</th>
<th>Teacher-Principal Responses</th>
<th>Consultant Responses</th>
<th>R₁</th>
<th>R₂</th>
<th>D</th>
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\[ \sum = 489.50 \]

Applying the formula \( p = \frac{1-6D^2}{N(N^2-1)} \) gives the following result, \( p = .76 \). Since the correlation was found to be .76 and there is no formula for estimating standard error of rho, confidence limits cannot be determined. However, the hypothesis that
the population correlation is zero can be tested. Using a standard table for rank difference coefficients of correlation that are significant at .01 level, it is found that an N of 22 must have a value of .508; an N of 24 must have a value of .485. The value of .76 derived in this study would be recognized as significant beyond the .01 level.

On the basis of these findings the null hypothesis of no relationship of perceived critical competencies could be rejected. In other words, we can say that consultants and teachers and principals do view these competencies similarly.

Further examination of the correlation table, especially the Column headed D, indicates that there were no, or small, differences in some of the competencies; whereas in other competencies there were marked differences. It is beyond the scope of this dissertation to determine or study these differences. However, additional studies might be made to ascertain the rank importance of the competencies by the various respondent groups.

3Ibid., 593.
CHAPTER VI

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Summary

The present study is concerned with urban area consultants because urban school systems are faced with the ever increasing phenomena of unparalleled growth in pupil population and teaching staff. Providing enough on-the-job assistance to teachers has created a most urgent service demand for consultants, since instructional improvement is dependent upon the personal growth and development of the individual teacher.

A review of the current literature revealed few research studies concerned with the problems of supervision. Analyses have been made of supervisory or consultant behavior, but this material has lacked specificity. Although some studies have attempted to provide specific information regarding the behavior of consultants or supervisors, they have treated rural area consultants.

The purpose of this study was to define inductively and to clarify the nature of the job requirements of the elementary curriculum consultant as perceived by teachers, principals and consultants, which are considered critical for effective consultant service.
The study proposed to answer the need for more objective analysis of the competencies needed for urban area consultants. It attempted to make a contribution toward a compilation of an operational statement of the competencies needed by the consultant as he worked on a one-to-one basis with the teacher. The determination of such competencies might serve as a basis for future studies dealing with formal job descriptions, developing evaluation techniques or improving the in-service preparation of consultants.

In order to accomplish the objectives of the study, it was necessary to choose a research design that would provide a collection of direct observations of consultant behavior in a form that they could be analyzed and arranged in such a manner that critical competencies could be formulated. The critical incident technique, developed by John C. Flanagan, met the requirements of the study and was selected as the research tool. The technique consisted of collecting from qualified observers, statements of effective or ineffective consultant behavior and subjecting these statements to the categorization process as outlined in the critical incident technique. Following this process resulted in a statement of the critical requirements for the job of curriculum consultant.

The respondents in this study were drawn from teachers, principals, and consultants in the Chicago Public Schools. Interviews were held with 100 teachers; 450 questionnaires were
mailed to teachers; 100 questionnaires were mailed to principals. Twenty elementary consultants were also asked to participate. The teachers and principals were selected at random from reports of consultant service which covered all administrative districts of the Chicago Board of Education. The consultants comprised the total elementary consultant staff which serviced all administrative school areas.

Each of the teacher and principal respondents was asked to describe one specific act which occurred while the consultant was working with the teacher on a one-to-one basis. This behavior was to be considered effective if it improved instruction or ineffective if it did not improve instruction.

Interviews, since they allow for explicit wording, were held as an adjunct to the mailed questionnaires to secure a level of expectation for the quality of mailed questionnaires. By inspection, the mailed questionnaires were of comparable quality to the interview responses.

Each of the twenty consultants was asked to provide up to twenty-five reports of critical incidents which occurred as he worked on a one-to-one basis with the teachers.

From the interviews and mailed questionnaires to teachers and principals, 538 reports of behaviors were obtained; from the consultants' reports, 344 reports of behaviors were obtained. The following three major areas of activity were derived from the reports of behaviors as constituting the critical requirements
for the job of curriculum consultant:

I. Materials of Instruction
II. Methods of Instruction
III. Interpersonal Relations

It was found that from the total of 882 behaviors, the largest number of behaviors, 341 or 38 per cent of the total, were found in Area I. Major Area II accounted for the next highest number of behaviors, 310 or 36 per cent of the total. Major Area III accounted for 231 behaviors or 26 per cent of the total.

Further analysis of the behaviors, through the category formulation process, inductively developed statements of critical competencies at the desired level of specificity. Behaviors were considered critical when the type of behavior was reported in both its positive and negative aspects by respondents from the same group. The following statements represent the critical requirements or competencies of the elementary curriculum consultant.

The following is the list of critical requirements or competencies as perceived by teachers and principals and consultants:

1. Demonstrates new instruments of instruction and involves the teacher in its use.
2. Provides actual instructional materials for the teacher to study, use and evaluate.
3. Recommends available resource materials to meet teacher needs.
4. Helps teacher adapt curriculum guide to classroom situation.
5. Explains use of curriculum guide and points out specific features.
6. Provides a demonstration of a useful instructional technique.
7. Helps the teacher make more productive use of
classroom’s physical environment.
8. Helps teacher to plan and organize the classroom program.
9. Suggests various instructional techniques to the teacher.
10. Arranges for teacher to observe instructional techniques which would be of help.
11. Cooperatively determines what can be of assistance to the teacher.
12. Establishes friendly rapport with the teacher.
13. Visits the teacher at an opportune time and does not interfere with work of the class.
14. Builds teacher confidence in the effectiveness of her techniques and efforts.

The following is the list of critical requirements or competencies of the elementary consultant as perceived by teachers and principals:

1. Assists teacher in physical preparation of teaching aids.
2. Engages in cooperative evaluation with the teacher of the demonstration lesson to insure teacher understanding.
3. Accompanies suggested techniques with concrete examples and illustrations.
4. Evaluates the teacher’s instructional techniques at teacher’s request.
5. Comments enthusiastically about specific teacher accomplishments.
6. Cites specific achievements of the teacher in the classroom to the principal.
7. Indicates interest in pupils’ work.
8. Becomes an active participant in the classroom program.

The following is a critical requirement as perceived by the consultants:

1. Acts as a listener for teacher problems and complaints.

These twenty-three statements of critical competencies were derived from teachers’ and consultants’ perceptions of what
they had actually experienced.

Since the respondent groups of teachers and principals and consultants supplied the necessary data for inductively deriving the critical competencies, it was deemed valuable to determine if any correlation existed between the perceived competencies as perceived by the consultants themselves and as perceived by the principals and teachers. A null hypothesis was set up and tested. The rank correlation method was used to determine if any correlation existed. It was found that a correlation of .76 existed when the number of responses between groups were ranked. Utilizing the appropriate table, it was found that the correlation was significant at .01. It was deemed highly unlikely that there is no correlation between the respondent groups in their perception of the critical competencies of consultants.

Limitations of the Study

The study identified the perceptions of teachers, principals and consultants toward consultant behavior in a one-to-one relationship with teachers. The results of the study can be accepted only if the reader is willing to accept the judgements of the respondents interviewed in this study.

The critical incident technique, as a research tool, allows for certain subjective elements. The perceptions, prejudices and partiality of the researcher enter into the categorization and development of critical competencies to an unknown degree. Although a review board checked the category formulation
process, the results might have been somewhat different had a
different researcher used the same data. This difference could
be attributed to language facility.

Some of the behaviors reported might have a greater
effect on teachers' instructional practices than others, but no
attempt was made to establish a relative order for behaviors.
This was beyond the scope of the study.

Conclusions

On the basis of the findings summarized above and de-
scribed in detail in earlier chapters, the following conclusions
are presented.

Certain conclusions can be drawn concerning the competencies re-
ported by teachers, principals and consultants of which an urban
area consultant must be aware and strive to develop.

The consultant should be prepared to demonstrate new in-
struments of instruction. In his demonstration it is necessary
to go beyond the demonstration and to guide the teacher in the
actual manipulation of the instrument. The demonstration should
not be concluded until the consultant and teacher are satisfied
that the teacher has acquired a usable skill.

The consultant should provide actual instructional ma-
terials which meet the specific needs of the teacher. This in-
volves a working knowledge of a particular classroom situation
and the ability to guide the teacher in exploring the correct use
of the materials.

The consultant recommends available resource material to meet teacher needs. The consultant must be well acquainted with the vast array of resource material upon which the teacher may request. The consultant must, if he doesn't have suggestions immediately available, promise and follow-up with information as soon as possible.

The consultant, in helping the teacher adapt curriculum guides to classroom situations, must be concerned with the teacher's perception of the actual classroom situation and structure the assistance according to the teacher's view of the classroom needs rather than the consultant's view of the classroom situation.

The consultant, in explaining the use of the guide and pointing out specific features, must present the guide in such a manner that all teachers will see individual values for the use of the guide.

The consultant must be ready to provide demonstrations of useful instructional techniques whenever called upon. When a demonstration is prepared, the consultant must do some preliminary planning with the teacher. Demonstrating a technique which the teacher is already aware of is a definite waste of consultant and teacher time.

The consultant, in helping the teacher make more productive use of the classroom's physical environment, must avoid
criticizing the present environment. In suggesting changes, the consultant must be aware of any particular administrative or custodial restrictions regarding the physical environment. When the consultant does recommend certain changes, it is necessary to go beyond mere suggestion and provide actual assistance.

The consultant, helping the teacher to plan and organize the classroom program, must be aware of the teacher's willingness to accept suggested changes. If the teacher is not willing to accept change, the consultant should not attempt to force the teacher to change.

The consultant, in suggesting instructional techniques, must be aware of what techniques are known to the teacher. The consultant does not accomplish any positive result by demonstrating a technique with which the teacher is already familiar.

The consultant, in analyzing ways to assist a teacher, should be ready to suggest and arrange appropriate opportunities for a teacher to observe techniques demonstrated by another teacher. It is necessary that the consultant do a thorough job of preparation and orientation.

The consultant, while working with a teacher, must allow the teacher to set the purpose of the visitation. The consultant cannot predetermine what should take place during the visitation.

The consultant should always consider the need for first establishing a friendly rapport with the teacher before initiating service.
The consultant must plan his schedule into the teacher's schedule. Interruption of a teacher's program can render any service totally ineffective.

The consultant must be aware that reassuring the teacher that her efforts are effective is necessary, because the teacher seeks and needs this support.

The teacher requires that the consultant participate in the physical preparation of any suggested teacher aid. It is not enough for the consultant just to suggest.

The teacher requires that the consultant follow up with an evaluation of a demonstration lesson. For the teacher to gain maximum values, the consultant must not assume the teacher understands all that was intended in the lesson.

The teacher needs concrete examples and illustrations of techniques and suggestions. The consultant must provide the specificity required by the teacher.

The teacher will actively seek evaluation of instructional techniques, but the consultant should avoid attempting to evaluate these techniques without being asked by the teacher.

The teacher seeks personal recognition for accomplishment. The consultant must attempt to provide this recognition whenever possible.

The teacher can gain stature when a consultant is in a position to call the principal's attention to some specific teacher achievement. The consultant should be aware of any special
circumstances whereby mention can be made of the teacher's achievements.

The teacher expects that a consultant will show an interest in the pupils' work and activities. The consultant should make the opportunity to indicate an interest in what the pupils are doing.

The teacher finds it desirable that the consultant, when possible, become part of any ongoing classroom activities. It is equally important that the consultant does not attempt to take over or dominate any of these activities.

The consultant must listen sympathetically to teacher problems, even though these problems are not related to an area in which the consultant can render direct assistance. The consultant should be aware that it is not possible to solve all these problems, but that the important competency is just listening to these problems.

The competencies for urban area consultants reported in this study are similar to the competencies reported for rural and county consultants.

Appendix H lists the competencies revealed in two allied studies. The following competencies listed by Ord parallel the competencies revealed in this study:

1. Enters the classroom without interrupting procedures and takes part in the class discussion or works quietly with a group of pupils while the teacher is occupied with another group.
2. Puts teacher at ease by focusing attention on a
specific problem and works with the teacher as a friendly helper.

3. Gives reassurance that the teacher is generally doing a good job.

4. Shows a sincere interest in the accomplishments of the class and compliments them for improvements noted.

5. Helps the teacher organize the classroom for more effective instruction and in some instances, particularly in a multigraded classroom, erases grade lines and groups by cutting across former grade lines.

6. Gives the teacher specific help in reducing separate subject lines and helps plan integrated units of work which cut across subject fields.

7. Carefully plans with the teacher and becomes acquainted with the class before giving a classroom demonstration.

8. Listens sympathetically to the teacher's problems using a non-directive means of helping the teacher gain deeper insight into problems.

9. Holds a conference with the teacher following a classroom observation in which both the consultant and teacher discuss and mutually evaluate the lesson.

10. Helps the teacher routinize classroom procedures that lend themselves to routinization and to help pupils become responsible for room environment.


12. Accepts the teacher on the level where he is and works carefully with him in developing new skills and procedures and, when necessary, helps provide psychological props.

13. Brings supplementary instructional materials to the classroom to support a specific project in which the teacher is engaged.

14. Suggests new and more effective techniques of working and follows through with specific help and guidance.

15. Suggests that the teacher adopt a new method or procedure and illustrates by giving a classroom demonstration.

16. Observes class and follows up with an evaluation conference with the teacher.

17. Does not interrupt the teacher or attempt to take over the instruction of the class while a particular lesson is in progress.
18. Brings instructional materials and carefully outlines procedures of how they are to be used.
20. Brings instructional materials to the classroom and demonstrates to the teacher how to use them with particular pupils.

The following competencies listed by Foster parallel competencies revealed in this study:

1. Provides new ideas and ways of approaching problems.
2. Gives carefully prepared demonstration lessons illustrating techniques of help to teacher and explains why she used specific techniques.
3. Makes certain that the teacher is ready for suggestions and then makes only a few at a time as is appropriate to the individual situation.
4. Listens to teacher's problems and tries to aid her in clarifying what is her problem and what she can do to improve the situation.
5. Takes time to observe and become acquainted with teacher and situation before offering possible solutions to a problem.
6. Provides and shows ways to use instructional materials suitable for a particular situation.
7. Provides direct assistance in the selection of materials suitable for a particular group of students.
8. Offers assistance in a friendly manner.
9. Gains teacher's confidence before giving specific suggestions.
10. Helps teacher gain recognition from school administration for a specific accomplishment.
11. Makes provisions for teacher to visit other classrooms and helps her evaluate what she observes.
12. Provides both the instructions and materials for making visual aid materials.
13. When helping a teacher to solve an instructional problem, suggests several approaches and explains why she suggests these certain techniques, materials or arrangements.
14. Introduces and demonstrates the use of new instructional materials without insisting they be used.
15. Waits until an appropriate time to make suggestions.
Certain competencies revealed in studies of rural and county consultants were not revealed in the present study.

The following competencies were noted by teachers and consultants in Ord's study:

Divides time equally among teachers according to their interests and needs.

Initiates class project with teacher and follows through to completion offering guidance and complete support.

These competencies reflect a difference in the time allotted by consultants in an urban area to particular schools and teachers. Urban area consultants do not have an extensive continuing relationship with teachers and faculties. As more consultants for urban area schools are employed, these two factors should be taken into consideration.

The following competency was noted by consultants in Ord's study:

Gives teacher an assignment in which he can succeed and gain status before others.

This competency could reflect a difference in role authority which is granted to rural consultants. Urban area consultants are considered staff personnel and do not have line authority for giving assignments such as workshop participants, committee membership or special programs. All such selections must come from the urban area principal.

Ord's study revealed the following competency which was not found in the present study. Possible reasons for the differ-
ence, other than the obvious difference in respondent groups, are noted:

Arranges for a conference time following observation which does not interfere with the teacher's regular school duties or plans.

This competency was noted only by teachers in Ord's study and was not reported for urban area consultants. It appears that the administrative arrangements are such in an urban area school that they are flexible enough for a consultant, when necessary, to arrange a satisfactory follow-up conference time. Since other competencies were noted in the present study which included a follow-up conference, it appears that scheduling is the factor in this competency.

The following competencies listed by Foster have no parallel competencies reported in this study. Possible reasons for the difference, other than the obvious difference in respondent groups, are noted. The following competencies were reported:

Holds grade level meetings at which clear explanations and demonstrations are given to the teachers.

Arranges for and conducts workshops about various curriculum areas and involves teacher in planning.

Helps a group of teachers compile and duplicate copies of their ideas and suggestions.

Arranges a meeting of teachers so that they may discuss what they feel are their problems.

Arranges opportunities for teachers to get together to share ideas and mutual problems.

These competencies reflect the wider range of Foster's study, which included group relationships with the teachers and
not solely a one-to-one working relationship.

The following competency was noted by supervisors and teachers:

Confers with both parent and teacher to help solve a problem with a child.

This competency is beyond the role of the urban area consultant because of existing staff relationships. The urban area consultant does not participate in parent-teacher conferences because of the established role of other line and staff personnel.

The following competency was reported by teachers only:

Gives help whenever needed and when necessary is willing to devote own time to help teachers.

This competency implies the closer teacher relationship which exists in rural or county areas. The behaviors reported in this area were identified more in the social, out-of-school context in which the respondents find themselves outside of urban areas.

The following competency was noted by teachers only:

Arranges an assignment for teacher to gain recognition from other teachers for a particular skill.

This competency, which is similar to a competency in Ord's study, reflects the difference in role authority which urban area consultants do not possess for giving assignments.

The following competency was reported by teachers only:

When faced with an explicit problem and doesn't know the answer, is willing to admit it.

This behavior was of an interpersonal nature, which could
be ascribed to urban or rural consultants or any administrative personnel. This competency, as reported by rural teachers, would certainly be of general importance to urban consultants, but it apparently did not enter into a competency which made the difference between success and failure in improving instruction.

Certain competencies revealed in the present study appear to differentiate the urban consultant's role from rural and county consultants.

Certain competencies were revealed in the present study which were not found in the other studies. The following competency was reported by urban area respondents:

Demonstrates new instruments of instruction and involves the teacher in its use.

This competency reflects more of the change in instructional tools which has occurred in recent years than a unique urban area competency. Since the other studies were completed, a vast array of instructional instruments has reached the educational market principally through the expanding technology and fiscal support of the National Defense Education Act. With many new instruments available for instructional improvement, it appears that the consultant becomes an important factor in working with the classroom teacher to develop skill in proper utilization of this equipment. This competency reflects more of a changing role for all consultants, rather than a unique role in a particular geographical area.
The following two competencies were reported by consultants and teachers and principals.

Explains use of guide and points out specific features.

Helps the teacher adapt curriculum guides to classroom situations.

These competencies were not reported in the other studies, although some implications were found in references to competencies related to materials of instruction. In the present study, these competencies are clearly reported and stressed by the respondents. Urban area teachers and consultants seemingly attach more importance to a curriculum guide than do rural or county teachers and consultants. This difference appears reasonable when the diversity and flexibility needed for an urban area guide are considered. Since 500 schools serve the full spectrum of childrens' needs, backgrounds, and capabilities, a curriculum guide must contain a wide range of goals, units, and activities for the instructional program. It becomes important to the teachers that they are fully aware of what curriculum requirements must be met. The selection and understanding of the appropriate learning experiences becomes a task which requires careful study by the teacher. It appears, from the above reported competencies, that the urban consultant must be specifically more aware of these competencies than a rural colleague, and work closely with teachers in proper utilization of curriculum guides.

A correlation was found to exist between consultants and teachers
and principals as to their perceptions of the critical competencies.

A correlation significant at the .01 level was found to exist between group perceptions. This correlation dispelled the null hypothesis of no correlation between the groups.

The critical competencies as revealed in this study seem to substantiate some of the behaviors theoretically indicated in professional literature.

The critical competencies were inductively derived from descriptions of supervisory behavior. These competencies do resemble some of those which have been suggested in the current literature in supervision. Some of the theoretical requirements for consultants found in the literature of supervision, as revealed in Chapter II, seem to have been verified. The study adds specific descriptions which definitely supplement existing generalizations.

The findings of the study have revealed how the consultant can operate effectively with the teacher.

However, below the operational surface, many effects of what consultants say and do become an unknown factor in the improvement of instruction. Consultants must remain alert to the fact that there are often broader problems to contend with in any situation and that the job of the consultant is much more complex than commonly realized.
Recommendations

1. A similar study, which would reveal effective ways of working in group situations, might enhance understanding of the total consultant role.

2. Another study, using the same research design but collecting descriptive information concerning personal characteristics of teachers, patterns of school environments, and philosophical orientation of teachers, could be done to test the relevancy of such factors.

3. This study was limited to consultants as they worked in the field with teachers. Studies should be done which would treat the competencies needed for working with principals, other administrative officers, and central office personnel.

4. It may be assumed that certain consultant behaviors have greater effects on teachers' instructional practices than others. Another study might be done which attempts to study these behaviors.

5. There appears to be sufficient agreement on the competencies required for one-to-one supervisory behavior that these competencies could be used as a basis for constructing selection tests or selection instruments. These tests or instruments could become important factors in the personnel policies related to the employment of consultants.

6. The present list of competencies should be considered
for part of any evaluation process or become a basis for an in-service action research project on the part of the consultants themselves.
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Unpublished Material


Dear Dr.

I am engaged in a doctoral study at Loyola University, Chicago, Illinois. The study involves use of the Critical Incident Technique which was formulated by John C. Flanagan. A key feature of the technique is securing a general aim for the activity under study.

It is my belief that you are extremely well qualified to provide pertinent information concerning the aim of a curriculum consultant in a large urban area.

Would you please react to the two questions on the enclosed page? A self-addressed envelope is also enclosed for your reply. Your cooperation is deeply appreciated.

Yours truly,

James F. Moore /s/

---

1. What would you say is the primary purpose of a curriculum consultant in a large urban area?

2. In a few words, how would you summarize the aim of the curriculum consultant in a large urban area?
Dear Colleague:

The importance which the elementary curriculum consultant is achieving in the American school system cannot be underestimated. One question remains partially unanswered. What competencies are required for this position?

A study is being undertaken at Loyola University in an attempt to find out what qualifications characterize the effective curriculum consultant. The Chicago Board of Education has given full approval for this study. This approval is on file in the office of Dr. Milton J. Cohler, Associate Superintendent in Charge of Administration.

In the present study, "the critical incident technique" is being used. Major emphasis is upon collecting and analyzing incidents, which were effective in terms of the goal sought in a particular activity. In other words, an attempt is being made to arrive at qualifications for the elementary curriculum consultant through observation and analysis of performance on one aspect of the job.

A major portion of the data needed must come from teachers and principals. You are invited to become a participant in this project. An information sheet is enclosed for your response. All information is completely anonymous. Please fill out the form and return it at your earliest convenience. Your assistance in making this study will be greatly appreciated.

Very sincerely yours,

James F. Moore /s/
INFORMATION SHEET

WHAT MAKES A GOOD CURRICULUM CONSULTANT?

You can make an important contribution toward arriving at an answer to this question since you have had a recent contact with a curriculum consultant. The present study, which is being conducted in the Graduate School at Loyola University, is a systematic attempt to collect and analyze such incidents. The major objective is to derive behavior elements from these contacts and formulate requirements for the elementary curriculum consultant. The findings of this study may provide a basis for selection procedures, improving preparation programs, evaluation of performance, and self-improvement.

The method used in this study was developed by John C. Flanagan of the American Institute for Research and has been used to determine critical requirements for pilots, teachers, principals, and other workers.

The procedure is called the "Critical Incident Technique." The critical incident can be described as follows: "By an incident is meant any observable type of human activity which is sufficiently complete in itself to permit inferences and predictions to be made about the person performing this act. To be critical, the incident must be performed in a situation where the purpose or intent of the act seems fairly clear to the observer and its consequences are sufficiently definite."

To be of maximum value to the study, the incidents you submit should be illustrative of actions on the part of consultants that contribute to the improvement of instruction in a given situation. Do not write a long essay. Simply and very briefly describe incidents which reflect particularly effective or ineffective consultant behavior in improving instruction.
CRITERIA OF A GOOD INCIDENT

PURPOSE OF THE ELEMENTARY CURRICULUM CONSULTANT

Please be sure that the incidents you report reflect the general aim of the curriculum consultant.

"The purpose of the elementary curriculum consultant is to improve instruction."

TO THE TEACHER

You have just shared a visit with an elementary consultant from the Department of Curriculum. I would like you to write a description of this specific incident remembering the purpose of the elementary curriculum consultant. The incident can be classified in one of two ways:

EFFECTIVE - It did help improve, in some way, your instructional practice.

INEFFECTIVE - It did not, in any way, improve your instructional practice.

In writing up your report on the attached form, please do the following:

First, indicate the setting
Second, tell exactly what the consultant did
Third, describe what you consider to have been the result on your teaching

To further clarify the type of incident needed, illustrations are reproduced on the following page.
EFFECTIVE INCIDENT

SETTING - A seventh grade social studies class. This class lacked many of the rudimentary map and globe skills. I was unable to obtain the appropriate introductory materials.

INCIDENT - The consultant showed me some resource suggestions which I had overlooked in the Teaching Guide. The consultant showed me how to prepare some visual aids that would present simple map and globe skills.

RESULT - I have been able to develop many more of these visual aids and I am actively using them in my class.

INEFFECTIVE INCIDENT

SETTING - A fifth grade arithmetic class. This class needed many more concrete materials than I could think of.

INCIDENT - The consultant visited my room. She described several kinds of concrete materials which would be beneficial. Although this oral suggestion was good, I still needed to have someone sit down and help me get started in making these objects.

RESULT - I still have not made any real progress in preparing these manipulative objects.

Several report sheets are enclosed for your use in case more than one incident occurred. Please return your reply in the self-addressed stamped envelope.
FOR TEACHERS

Please write a description of a recent incident involving you and a curriculum consultant. Please check if the incident was effective - that is, if it resulted in some way in improved instructional practices on your part, or ineffective - that is, if it did not improve in any way instructional practices on your part.

Effective __________ Ineffective __________

(Please check one)

THE SETTING:

INCIDENT:

RESULT: (Describe what you consider to have been its results on your teaching practices.)
CRITERIA OF A GOOD INCIDENT
PURPOSE OF THE ELEMENTARY CURRICULUM CONSULTANT

Please be sure that the incidents you report reflect the general aim of the curriculum consultant.

"The purpose of the elementary curriculum consultant is to improve instruction."

TO THE PRINCIPAL

You have just had an elementary consultant from the Department of Curriculum work with one of your teachers. If you have knowledge of the interaction between the consultant and the teacher, I would like you to write a description of this specific incident. The incident can be classified in one of two ways:

EFFECTIVE - It did help improve, in some way, the instructional practices of the teacher.

INEFFECTIVE - It did not, in any way, improve the teacher's instructional practices.

In writing up your report on the attached form, please do the following:

First, indicate the setting
Second, tell exactly what the consultant did
Third, describe what you consider to have been the result on the teaching

To further clarify the type of incident needed, illustrations are reproduced on the following page.
EFFECTIVE INCIDENT

SETTING - A fifth grade language arts class with a new teacher. The teacher needed assistance in getting the pupils to speak in complete thoughts. The consultant visited the room at my request.

INCIDENT - The consultant advised the teacher that many of her techniques were excellent but that more pupil self-evaluation was needed. The consultant advised the teacher to use the tape recorder for pupil self-analysis. The teacher was encouraged to allow pupils to evaluate each other's speech patterns.

RESULT - The teacher has reported that the pupils are making a more conscious effort to speak whole thoughts in all subject areas.

INEFFECTIVE INCIDENT

SETTING - A sixth grade teacher has not developed a science program based on anything but a textbook.

INCIDENT - The consultant was asked to show the teacher some simple experiments that were contained in the course of study. The consultant pointed out the ease with which the materials could be used and sent some additional information to the teacher.

RESULT - The teacher still refuses to conduct any experiments in the classroom. All work is carried on through textbook reading.

Several report sheets are enclosed for your use in case more than one incident occurred. Please return your reply in the self-addressed envelope.
FOR PRINCIPALS

Please write a description of a recent incident of which you have knowledge involving one of your teachers and a curriculum consultant. Please check if the incident was effective - that is, if it resulted in some way in improved instructional practices on the teacher's part or ineffective - that is, it did not improve in any way instructional practices on the teacher's part.

Effective______________Ineffective______________

(Please check one)

THE SETTING:

INCIDENT:

RESULT: (Describe what you consider to have been its results on his teaching practices.)
The purpose of this study is to find more about the competencies required for the role of the curriculum consultant.

I would like to have you write twenty-five descriptions of incidents, involving you and the teachers you have worked with, which resulted in improved instructional practices on his part or which did not improve his instructional practices.

First, indicate the setting, then tell exactly what you did and then describe its results on the teacher.

Please write freely. Your name will not be used in connection with this report in any way.
SAMPLE INCIDENT REPORT

The following is a sample of a good incident report. It reflects

First - the setting
Second - it tells exactly what the consultant did
Third - it describes what you believe was the result on the teaching situation

Please be sure that the incidents you report reflect the general aim of the curriculum consultant.

"The purpose of the elementary curriculum consultant is to improve instruction."

SAMPLE INCIDENT

SETTING - A third grade reading class. While the teacher was working with one group the other groups were engaged in meaningless arithmetic busy work.

INCIDENT - I worked with the teacher and showed how one of the two groups could be doing a reading workbook assignment and how the other group could be getting ready studying some board work.

RESULT - The teacher was able to follow through and develop the recommended organization. (Effective)

or

The teacher said that only arithmetic drill would keep them quiet. (Ineffective)

or

The teacher said she would try my suggestions. (Effective)

or

The teacher said "I never knew how to organize a lesson in such a manner until you gave me concrete illustrations." (Effective)
Dear

As we discussed I am sending you the material for your consultant incident reports. If you would take just a few minutes a day to write up an incident, we would achieve our goal of twenty-five incidents very quickly.

I am including in this packet the incident forms and the instructions for filing your incidents. Stamped, self-addressed envelopes are also enclosed. Please mail any incidents as soon as possible.

Enclosed with this packet is a sample of the forms that I will be sending teachers and principals for their incident reporting.

Very truly yours,

James F. Moore /s/
Please write a description of a recent incident involving you and a teacher. Please check if the incident was effective - that is, if it resulted in some way in improved instructional practices on his part, or ineffective - that is, if it did not improve in any way instructional practices on his part.

Effective ______________ Ineffective ______________

(Please check one)

THE SETTING:

INCIDENT:

RESULT: (Describe what you consider to have been its results on his teaching practices.)
Dear Colleague:

A short time ago you were asked to participate in an educational study. Because of the anonymous nature of this study, I do not know if you returned your questionnaire. If you have returned the questionnaire, my sincerest appreciation. If you have not had an opportunity to respond to this questionnaire, I would appreciate it if you would take a few minutes from your already busy schedule to do so in the next week.

In appreciation,

James F. Moore /s/
APPENDIX E

FINAL FOLLOW-UP LETTER

Dear Colleague:

In the last month you have received two communications from me concerning a project under way at Loyola University.

If you have not returned your completed incident form, would you please take a few minutes to complete this form in the next day or two?

Your assistance in this project is sincerely appreciated.

Yours truly,

James F. Moore /s/
APPENDIX F

REVIEW BOARD CATEGORIZATION OF FIFTY BEHAVIORS SELECTED
AT RANDOM COMPARED TO THE CATEGORIZATION
OF THE RESEARCHER

| Incident | Researcher | Member "A" | Member "B" | Member "C" | Member "D"
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### APPENDIX G

NUMBER OF RESPONSES FROM RESPONDENT GROUPS TO THE DERIVED 23 CRITICAL COMPETENCIES

<table>
<thead>
<tr>
<th>Competency</th>
<th>Principal-Teacher Responses</th>
<th>Consultant Responses</th>
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</thead>
<tbody>
<tr>
<td>1. Demonstrates new instruments of instruction and involves the teacher in its use.</td>
<td>36</td>
<td>21</td>
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<tr>
<td>2. Provides actual instructional materials for the teacher to study, use and evaluate.</td>
<td>62</td>
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<tr>
<td>3. Assists teacher in physical preparation of teaching aids.</td>
<td>23</td>
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<tr>
<td>4. Recommends available resource materials to meet teacher needs.</td>
<td>37</td>
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<tr>
<td>5. Helps the teacher adapt curriculum guides to classroom situations.</td>
<td>34</td>
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<tr>
<td>6. Explains use of guide and points out specific features.</td>
<td>28</td>
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<tr>
<td>7. Provides a demonstration of a useful instructional technique.</td>
<td>29</td>
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<tr>
<td>8. Engages in cooperative evaluation with the teacher of the demonstration lesson to insure teacher understanding.</td>
<td>10</td>
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<tr>
<td>9. Helps the teacher make more productive use of classroom's physical environment.</td>
<td>14</td>
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<tr>
<td>10. Helps teacher to plan and organize the classroom program.</td>
<td>39</td>
<td>31</td>
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<tr>
<td>11. Suggests various instructional techniques to the teacher.</td>
<td>34</td>
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<tr>
<td>12. Accompanies suggested techniques with concrete examples and illustrations.</td>
<td>25</td>
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<td>13. Evaluates the teacher's instructional techniques at teacher's request.</td>
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<td>14. Arranges for teacher to observe instructional techniques which would be of help.</td>
<td>16</td>
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<tr>
<td>15. Cooperatively determines what can be of assistance to the teacher.</td>
<td>37</td>
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<tr>
<td>16. Establishes friendly rapport with the teacher.</td>
<td>21</td>
<td>24</td>
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<tr>
<td>Competency</td>
<td>Principal-Teacher Responses</td>
<td>Consultant Responses</td>
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<tr>
<td>17. Acts as a listener for teacher problems and complaints.</td>
<td>16</td>
<td>11</td>
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<tr>
<td>18. Visits the teachers at an opportune time and does not interfere with work of the class.</td>
<td>18</td>
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<tr>
<td>19. Builds teacher confidence in the effectiveness of her techniques and effort.</td>
<td>11</td>
<td>13</td>
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<tr>
<td>20. Comments enthusiastically about specific teacher's accomplishments.</td>
<td>14</td>
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<tr>
<td>21. cites specific achievements of the teacher in the classroom to the principal.</td>
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<tr>
<td>22. Indicates interest in pupils' work.</td>
<td>6</td>
<td>4</td>
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<tr>
<td>23. Becomes an active participant in classroom program.</td>
<td>10</td>
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APPENDIX H

STATEMENT OF CRITICAL COMPETENCIES OF THE SUPERVISOR

1. Arranges for and conducts workshops about various curriculum areas, involves teachers in the planning.

2. Holds grade level meetings at which clear explanations and demonstrations are given to the teachers.

3. Provides new ideas and ways of approaching problems.

4. Gives carefully prepared demonstration lessons illustrating techniques of help to teacher and explains why she used specific techniques.

5. Makes certain that the teacher is ready for suggestions and then makes only a few at a time as is appropriate to the individual situation.

6. Listens to teacher's problems and tries to aid her in clarifying what is her problem and what she can do to improve the situation.

7. Takes time to observe and become acquainted with teacher, and situation before offering possible solutions to a problem.

8. Provides and shows ways to use instructional materials suitable for a particular situation.

9. Provides direct assistance in the selection of materials suitable for a particular group of students.

10. Offers assistance in a friendly manner.

11. Gains teacher's confidence before giving specific suggestions.

12. Helps teacher gain recognition from school administration for a specific accomplishment.

13. Gives help whenever needed and when necessary is willing to devote own time to help teachers.

14. Confers with both parent and teacher to help solve the problem of a child.
15. Makes provisions for teacher to visit other classrooms and helps her evaluate what she observes.

16. Provides both the instructions and materials for making visual aid materials.

17. Helps a group of teachers compile and duplicate copies of their ideas and suggestions.

18. Arranges opportunities for teachers to get together to share ideas and discuss mutual problems.

19. When helping a teacher to solve an instructional problem, suggests several approaches and explains why she suggested these certain techniques, materials or arrangements.

20. Introduces and demonstrates the use of new instructional materials without insisting they be used.

21. Waits until an appropriate time to make suggestions.

22. Arranges an assignment for teacher to gain recognition from other teachers for a particular skill.

23. When faced with an explicit problem and doesn't know the answer is willing to admit it.

24. Arranges a meeting of teachers so they may discuss what they feel are their problems.¹

CRITICAL COMPETENCIES OF COUNTY SCHOOL CONSULTANTS

1. Enters the classroom without interrupting procedures and takes part in the class discussion or works quietly with a group of pupils while the teacher is occupied with another group.

2. Puts teacher at ease by focusing attention on a specific problem and works with the teacher as a friendly helper.

3. Gives reassurance that the teacher is generally doing a good job.

4. Arranges for a conference time following an observation which does not interfere with the teacher's regular school duties or plans.

5. Shows a sincere interest in the accomplishments of the class and compliments them for improvements noted.

6. Helps the teacher organize the classroom for more effective instruction and in some instances, particularly in a multi-graded classroom, erases grade lines and groups by cutting across former grade lines.

7. Gives the teacher an assignment in which he can succeed and gain status before others.

8. Gives the teacher specific help in reducing separate subject lines and helps plan integrated units of work which cut across subject fields.

9. Carefully plans with the teacher and becomes acquainted with the class before giving a classroom demonstration.

10. Listens sympathetically to the teacher's problems using a non-directive means of helping the teacher gain deeper insight into problems.

11. Holds a conference with the teacher following a classroom observation in which both the consultant and teacher discuss and mutually evaluate lesson.

12. Helps the teacher routinize classroom procedures that lend themselves to routinization and to help pupils become responsible for room environment.


14. Accepts the teacher on the level where he is and works carefully with him in developing new skills and procedures and, when necessary, helps provide psychological props.

15. Brings supplementary instructional materials to the classroom to support a specific project in which the teacher is engaged.
16. Suggests new and more effective techniques of working and follows through with specific help and guidance.

17. Suggests that the teacher adopt a new method of procedure and illustrates by giving a classroom demonstration.

18. Observes class and follows up with an evaluation conference with the teacher.

19. Does not interrupt the teacher or attempt to take over the instruction of the class while a particular lesson is in progress.

20. Brings instructional materials and carefully outlines procedures of how they are to be used.


22. Initiates a class project with the teacher and follows through to completion offering guidance and complete support.

23. Brings instructional materials to the classroom and shows the teacher how to use them with particular pupils.

24. Divides time equally among teachers according to their interests and needs.2

The dissertation submitted by James F. Moore has been read and approved by five members of the Department of Education.

The final copies have been examined by the director of the dissertation and the signature which appears below verifies the fact that any necessary changes have been incorporated, and that the dissertation is now given final approval with reference to content, form, and mechanical accuracy.

The dissertation is therefore accepted in partial fulfillment of the requirements for the Degree of Doctor of Education.

1/15/66
Date

Signature of Adviser