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# Reactions to the formative evaluation policy of Horizon School Division by former County of Warner educators

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**REACTIONS TO THE FORMATIVE EVALUATION POLICY  
OF HORIZON SCHOOL DIVISION  
BY FORMER COUNTY OF WARNER EDUCATORS**

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## Abstract

With amalgamation of school districts in 1994, the southern part of the former County of Warner School Division joined with the Taber School Division to form the Horizon School Division. Policies from the two divisions were combined through the work of a policy committee. One of the most significant policies was the Horizon School Division Formative Evaluation Policy. This policy marked a dramatic change for those educators from the old County of Warner. Evaluation had been often feared and seen as punitive.

This study examined the reactions of 11 former County of Warner educators to the new policy. Interviews were conducted and the results analyzed, both by examining specific questions and by examining themes that arose across the questions.

The themes that arose were as follows:

1. There is still much fear amongst teachers regarding evaluation. The Horizon Formative Evaluation Policy has done much to lessen that fear.
2. Teachers are dissatisfied with incomplete or insufficient evaluation.
3. The policy promotes the treatment of teachers as professionals. Teachers are able to choose areas of perceived need and tend to focus on their students.
4. Teachers and administrators have concerns that not all involved with the policy will take it seriously and fulfil its expectations with appropriate effort.

5. Development of trust between teachers and administrators and amongst teachers themselves is essential for the policy to succeed.

6. Teachers appreciate that the policy allows the individual teacher to focus on his or her whole person and not just on their classroom situation.

The key issue involved for the policy to succeed is the development and maintenance of trust amongst the educators using the policy. New administrators and teachers must be trained effectively in the use of the policy.

The Horizon Formative Evaluation Policy has been received favorably for the most part by former County of Warner educators. With continued development of the necessary trust, it is expected that the policy will be a successful one.

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# Reactions to the Formative Evaluation Policy of Horizon School Division

by Former County of Warner Educators

## Introduction

The evaluation process is one that causes a great deal of stress for the average teacher, and one that involves a great deal of work (and stress) for administrators. Traditionally, evaluation has been a summative process where an administrator makes a judgment regarding teacher competency.

Very little in the way of formal “formative evaluation” is undertaken in school divisions. Teachers undergo “professional development”, but this is usually in the form of attending a yearly conference and various sessions at an annual teachers’ convention. Teachers will often “think about” and sometimes even work together on improvements, but any organized efforts at a formative process are limited.

In the fall of 1994, school district regionalization led to the formation of a new division now known as Horizon School Division No. 67. Included in this new division are four schools from the former County of Warner.

The amalgamation with the former Taber division brought many changes. One of the most interesting was the adoption of the Formative Evaluation Policy, which has been under



development in the former Taber Division since 1990. In the former County of Warner, evaluation was carried out in the traditional way. This method of evaluation led many teachers to express feelings of nervousness, stress, and even fear regarding their personal evaluations. The concept of “formative evaluation” was not one that was familiar to them.

In its focus on Formative Evaluation for experienced teachers, the Horizon District has made considerable changes in the way evaluation is carried out, where teacher competency is assumed, and teachers are responsible for developing their own formative plans. Each year the teacher develops a plan which he or she shares with the school administrator. The administrator’s role is not to modify or direct the plan, although suggestions may be made, but only to acknowledge that each professional teacher is indeed partaking in the formative process.

The policy is described in an Alberta Teachers’ Association Professional Development Bulletin entitled “Promoting Growth and Ensuring Accountability: A Guide to the Practice of Teacher Evaluation”, which was edited by Hart and Johnson (1995). The policy has gained acceptance within Alberta. The ideas are referred to in an Alberta Education policy position paper entitled “An Integrated Framework to Enhance the Quality of Teaching in Alberta”.

With amalgamation, former County of Warner teachers have adopted this and many other policies developed in the former Taber division. The Formative Evaluation policy, relatively new even to the Taber teachers, is one that has been pursued by the staff of the southern schools through the following means:

- meetings involving administrators of the former County schools and Taber committee members
- visits to the staffs of each former County school by pairs of teachers from the evaluation committee
- members from the former County have joined the Horizon Formative Evaluation Committee
- a half-day workshop was held for all County teachers in order to familiarize them with the Formative Evaluation policy
- further professional development is pending

This study will investigate the reactions of former County of Warner teachers to the Formative Evaluation Policy of the new division, now that they have worked within the policy for two years.

### Concerns

As with many teachers, my personal experiences with evaluation have been solely of the summative kind. Even though I considered myself to be a competent teacher, the thought of evaluation brought feelings of anxiety and self-doubt. The idea of “Formative Evaluation” was not one that I experienced. Like most teachers, I have been actively involved in professional development activities, and I have constantly strived to improve the teaching and learning in my classroom, but this process has never been formalized in any way. I was used to the idea of a formal evaluation every three years or so. The idea of a formal formative plan to be worked on every year was foreign to me.

From informal conversations with colleagues in the former County of Warner, it seems that many of them have had similar experiences to myself with regards to evaluation. One has to only mention the term “IOTA” to certain staff members to obtain a dirty look and a negative reaction. (IOTA is the “Instrument for the Observation of Teaching Activities”. See Deever, Demeke, and Wochner (1972) for a description.) Evaluation was seen only as a summative process to be endured every so often. No formal formative process was ever discussed.

The Horizon School Division Formative Evaluation Policy however is distinctly different. It promises to remove the stress and fear associated with summative evaluations for experienced teachers and replace that with a more professional system of self-generated formative planning. I am interested whether the implementation of this policy resulted in changes in attitudes of former County of Warner educators.

#### Questions to be Pursued

What have been the past experiences of teachers with evaluation and more specifically with formative evaluation?

What are their opinions of the Horizon policy of formative evaluation, including:

- Has the policy been effectively communicated to you?
- What about the actual policy is helpful and/or hindering to you and your teaching?

- How do you feel this formative evaluation policy has affected your school, for example in these areas: staff morale, teacher-teacher, teacher-administrator, and teacher-student relationships, school climate, and so on?
- What is your personal feeling with regards to the formative evaluation policy? How do you feel it affects your own teaching?
- How do you feel the Formative Evaluation Policy will affect your own teaching in the future?
- What further instructions and/or workshops would you like to have with regards to formative evaluation?

Some questions specifically apply to administrators:

- How is this policy affecting your role as administrator?
- What benefits are being seen?
- What, if any, negative effects are being seen?

## Objectives of Research

The main goals of this research project are to investigate the feelings and attitudes of former County of Warner teachers to evaluation from past and present experiences and what they foresee in the future.

More specifically, I hope to explore their attitudes towards the Horizon School Division Formative Evaluation Policy as it affects them and their teaching. How has this policy affected them personally, in their interactions with their colleagues, and in their interactions with their students? Emphasis is also to be placed on what assistance teachers and administrators feel they need to be successful within this formative evaluation framework.

The results of this study will be useful to the members of the Horizon School Division's Formative Evaluation Committee, in that they will receive feedback on how the policy has been accepted in the former County of Warner Schools, and they can continue to work on the policy so that it can better serve the teachers of the division.

## Literature Review

### I. Concerns with Evaluation

Not surprisingly, the recent literature shows us that evaluation continues to be a concern for both teachers and administrators. Teachers express dissatisfaction with the evaluation process and often find that it actually has very little to do with their everyday teaching lives.

Webb (1995) discusses her concerns as a teacher with regards to her personal evaluations. She asks: “Why is it, that what was important to me did not count in my evaluation?” (p-213) She discusses the feeling that evaluations are done to satisfy certain requirements rather than to encourage the improvement of teaching practice. She states that she felt like she was putting on a staged show in order to pass the required evaluation. Further, she states:

“What counts, what is measured, is not the teacher’s practice or what the teacher knows from practice, but a system-devised set of criteria.” (p-214)

She complains that teacher evaluation misses “the teacher’s knowledge and meanings of his/her work”. (p-217)

In my experience, this is what evaluation often seems to be. I have felt that it was a matter of “jumping through hoops” in order to fulfil whatever I thought the evaluator wanted to see in a particular class period. Once the evaluation was over, then I could go back to being myself and get back to teaching the way I enjoyed doing it, and the way I thought that the children would learn the best. Other teachers I have spoken to have expressed similar feelings.

Searfoss and Enz (1996) describe this also. They find that teachers are highly frustrated with checklists and other traditional evaluation methods. The teachers they worked with are

similar to myself and others that I have known. Rather than being myself and teaching in my usual way, I had a tendency to teach a different lesson than usual in order to “pass”.

Sahakian and Stockton (1996) expressed similar concerns about “canned lessons” being performed for the benefit of the administration.

Webb continues to state that:

“ The most significant aspect of the story is that for me (the teacher), evaluation was an unsatisfactory process irrespective of the outcome.” (p-221)

Very few teachers would admit that evaluation is an enjoyable process for them. Even the most positive, who would find evaluations to be an opportunity to improve on one’s weaknesses, must feel some sense of at least apprehension in having another person, most often someone in an authoritative position, making judgements on his or her teaching practice.

Webb calls for a system of teacher evaluation where power is shared rather than controlled and where teachers are seen as knowledgeable about their practice. Further, she states that structures need to be “developed to include what teachers have to say in decisions about what counts”. (p-223)

The Horizon Formative Evaluation Policy has allowed for this to happen. The committee that developed the policy was made up mostly of teachers with some administrative input. This allowed for the sharing of power and teacher input that Webb desires.

Rifkin (1995) found that there was a fear amongst faculty that supposed formative evaluation might be used to make decisions on tenure, promotion, and dismissal. This idea is specifically referred to in the Horizon Formative Evaluation Policy. None of the data derived

from a teacher's formative plan may be used in a summative manner without the permission of the teacher. The teacher controls the formative plan and the results deriving from it.

Throughout the literature it is often expressed that formative and summative evaluation must be kept separate. The Horizon Division's policy keeps the two types of evaluation separate, but acknowledges that both are very important. Summative evaluations still occur in many situations, such as for new teachers and those seeking a change of assignment. As well, teachers may request a summative evaluation at any time. Administrators may initiate a summative evaluation if they see the need, and a formal process must be followed.

Oppenheim (1993) discusses how a principal will adopt a distinctly managerial position in evaluation even though he/she may think of him/herself as a professional equal. It seemed that often the principal's own practice was used as a yardstick by which the other's teaching was gauged. This is not surprising to me, as I would think that a principal would naturally tend to compare another's teaching with his or her own. The key with the Horizon policy however is that the teacher controls the formative plan. The administrator has no right to insist on changes or a certain focus, although suggestions may be given.

Rooney (1993) discusses a formative evaluation model about which she, as principal, says:

“I am no longer the one responsible for a teacher's behavior. Teachers are now responsible for their own professional growth.” (p-44)

This is exactly what is aimed for with the Horizon Policy. Teachers are responsible for their own professional growth. Ironically in Rooney's article, the situation she describes still involves direct principal involvement.



## II. Development and Implementation of a Policy

The question then arises as to how a formative evaluation system can be developed and how it can be maintained within a division. What is necessary for successful formative evaluation to occur? How can teachers actually “do” formative evaluation?

da Costa and Riordan (1996) describe the importance of trust in establishing relationships with other teachers when it comes to teaming up and working on formative evaluation. As teachers become more confident in their abilities, they are better able to work together. I would agree with this. For any evaluation system to be effective, there has to be trust amongst the participants. One of the major concerns expressed by former County of Warner teachers has been the lack of trust. I have heard teachers say that evaluation was a way of picking on people or a way to get rid of people. These teachers must learn to trust each other, and to also develop mutual trust with their administrators, if the evaluation policy is to be successful. Gitlin and Smyth (1989) discuss the concept of “Horizontal Evaluation”, where teachers discuss their practice on an equal footing rather than in the usual top-down way. This can only lead to an increase in the development of trust.

There are many ways that teachers can actually work on their formative evaluation plans. Many of these can encourage the building of this trust amongst colleagues. Emery (1996) advocates the use of reflection and conversation amongst teachers to improve their understanding of their teaching. Teams of teachers may be organized. Sahakian and Stockton (1996) describe a peer observation system which has been successful. Again, trust needs to be

developed for such a system to be successful. Wiedmer (1995) likewise describes a teacher-centred, collegial, and collaborative model which can only be successful with the establishment of rapport and trust in a proper climate.

According to Shanker (1996), teachers need time to focus on problems of teaching and learning and to observe and learn from one another. He describes a system in Toledo, where teachers have set standards of practice and work to assist other teachers. This sounds very similar to the Horizon Formative Evaluation Committee's development of a set of key indicators which can be used by teachers as guidelines in the development of their formative plans. The main indicator of success again seems to be that it is the teachers themselves who have developed such guidelines.

Delandshire (1996) discusses how assessment of teachers can be different in that the teacher presents the questions she raises about her teaching that reflect her current understanding. The discussion involved would be a regular activity done with her peers. A difference from the Horizon policy would be that the teacher's assessment plan would be submitted to an assessment panel for approval. According to the Horizon Policy, no one has the right to approve or disapprove an individual teacher's plan.

Egelson (1994) describes how since 1991, the SouthEastern Regional Vision for Education (SERVE) has supported selected school divisions in attempts to design and implement formative teacher evaluation plans. There was strong teacher and administrative support, but the

following difficulties were encountered: Time constraints, lack of equipment, teacher procrastination, and initial unwillingness to participate. Teachers reported that the new system is less stressful and has enhanced teacher professionalism and feelings of empowerment. In the Horizon Division, it would not be surprising if similar difficulties were also encountered. Time is always a problem for teachers, but it is hoped that this policy might actually save time by better organizing a teacher's improvement plans. The positive feelings expressed by Egelson seem to be evident from my informal conversations. Teachers like the increased professionalism they feel and enjoy the fact that they control their own formative plan.

Some teachers prefer not to work in teams with their colleagues, but prefer a more personal, self-evaluation plan. The Horizon policy allows for this option. This is also discussed in the literature. Haertel (1993) describes how teachers can use various methods of self-evaluation in their formative evaluation plans for self-improvement. McColskey and Egelson (1993) also promote self-evaluation by using reflective techniques to work towards continuous improvement.

The key to the Horizon Formative Evaluation Policy is that there is lots of freedom. A teacher may choose to do his or her formative plan in any way they feel comfortable with. Spencer (1992) describes four possible methods of facilitating formative evaluation: Staff development programs, self-evaluation processes, classroom research, and peer coaching. Most of Horizon's teachers would tend to use one of these approaches, but are not limited to them.

A conversation with Tom McGreal, as described by Branch (1996), involves a discussion of the implementation of formative evaluation plans. McGreal states that:

“We know that adults respond primarily to positive reinforcement, that they want to be involved, that they prefer to operate in a collegial and collaborative environment.” (p-30)

McGreal describes formative plans that are built around some form of individual goal setting, and are often referred to as professional development plans.

Many of McGreal’s descriptions match the formative evaluation policy of the Horizon School Division. It is assumed that the teacher is meeting all of the basic expectations of the district. The teacher and the administrator meet to work on the goals, and at the end of the year the two meet to discuss what’s been accomplished, their reflections, and where to go from there. “There are no summative write-ups, no ratings, no evaluative commentary.” (p-32)

A difference between McGreal’s ideas and the Horizon policy is his insistence on a final “product” produced, and on a “focus” which everyone works towards.

McGreal states that board members will accept such an idea once they understand it. This is true in the Horizon Division. The School Board has been very supportive of the Formative Evaluation Policy.

He also says the following, which is a sentiment that was often stated in the meetings of the Horizon Formative Evaluation Committee:

“Don’t make us build an evaluation system for those one or two bad eggs. Let’s build a system for the 98 percent of teachers who are going to be there for life.” (p-32)

In closing, McGreal compares teacher evaluation with current ideas on student evaluation:

“We can’t pride ourselves on individualizing instruction for students and then treat all adults exactly alike.” (p-33)

Duke and Stiggins (1986) also seem to express what the Horizon Policy is aiming at:

“Teacher evaluation is best thought of as a highly individualized experience - a personal journey.” (p-13)

Each teacher is different, and as such the Horizon Policy allows for each teacher to develop their own formative plan which they see as the best way to improve their own teaching. Duke and Stiggins also agree with the idea that we need evaluation systems that promote the development of all teachers, not just those having difficulty.

Others have expressed the need for teachers to become more responsible for their own improvement. Gibbons and Norman (1987) state that there needs to be an emphasis on self-education. Hopkins (1987) has this wish regarding teachers:

“I wish to encourage them to engage in systematic enquiry of their own teaching for the purpose of improving classroom practice.” (p-111)

### III. Research in Alberta

In Alberta, a fair amount of research has been done regarding evaluation since 1984, when the province of Alberta approved a teacher evaluation policy which required school jurisdictions to develop their own evaluation policies.

Townsend (1984) reported on the first year of such a policy implemented in Lethbridge schools. Later, he also reported on projects that were undertaken in Medicine Hat schools in the time period between 1983 to 1987 (Townsend, 1987). The Medicine Hat School District continued to be a focus in the work on evaluation policies and their implementation. Umpleby (1989) describes a formative process which involves using a supervisor and the positive staff attitudes involved with that. Carter (1991) discusses the use of a “coaching team” in the Medicine Hat model.

Greene (1990) evaluates the Medicine Hat model for Teacher Supervision and Evaluation. She advises other districts that are developing evaluation policies:

“Teachers must be involved very early in the planning of any implementation.”  
(p-28)

She also states that:

“It is important to ‘take the high ground’; energies should be focussed on committed leaders and their belief in teachers’ expertise should be genuine.”  
(p-29)

It is apparent that this advice has been indeed followed in the development of the Horizon Formative Evaluation Policy.

The Spirit River School Division (1993) has described a policy developed over three years. Their system uses formative supervision and observation. The most positive aspect of their project was found to be the active involvement of their professional staff in action research.

Haughey et al (1993) produced a comprehensive report for Alberta Education entitled “Toward Teacher Growth: A Study of the Impact of Alberta’s Teacher Evaluation Policy”. This report examined eight case studies of evaluation policies in Alberta.

The authors describe 3 metaphors with which to view teacher evaluation:

- Teaching as Technical Expertise
- Teaching as Art
- Teaching as Professional Judgement

The first metaphor applies mostly to summative evaluation, with the idea of judgement of specific skills and practices. Its main purpose is accountability.

The third metaphor, Teaching as Professional Judgement, involves setting standards in a shared decision making process. It emphasizes group interaction, while the Horizon Formative Evaluation policy focusses more on individual teachers.

It is the second metaphor, Teaching as Art, which seems to fit best with the Horizon Formative Evaluation Policy. The authors write that:

“The substance or matter of evaluation is rooted in the teacher’s own practice rather than externally imposed criteria.” (p-8)

As well, in reference to teachers:

“They decide what it is they need to know, when they need it, and why they need it. Administrators encourage and facilitate teacher evaluation efforts but are not involved in the evaluation process.” (p-8)

In one of the case studies, a teacher states:

“I would like to be able to evaluate myself and say, ‘Okay, these are the areas I want to focus on in the upcoming year’. I think that the principal should sit down with his teachers one by one and talk to them and about them as professionals.”  
(p-259)

The above teacher could easily have been one from the Horizon School Division. The situation he or she describes above is indeed what most commonly occurs in the Horizon Division. The question that then arises is: “How do the teachers from the former County of Warner feel about this new Formative Evaluation Policy?”

### Methodology and Interpretation of Results

In order to collect the data in this project, interviews were conducted with teachers and administrators from schools in the former County of Warner. For the purposes of this study, the Hutterian Schools were not included.

From each of the four schools (Warner School, Milk River Elementary, Erle Rivers High School, and Coutts Community School), it was hoped that the Principal and two teachers, one with many years of experience (at least 15) and one with less experience (5 -10 years), could be interviewed. One current Principal had not been in the County of Warner so was excluded. In total, eleven interviews were conducted (3 Principals, 8 Teachers).



The interviews involved the questions described earlier plus others posed for the purpose of clarification that will help to find out about the teachers' and administrators' reactions to the formative evaluation policy.

Tapes of the interviews were then transcribed and analyzed. The goal was to investigate common themes and to find out the similarities and differences amongst the opinions of teachers with very long service and relative newcomers. Variations between teachers and administrators were also deemed important. As well, similarities and differences amongst the schools were explored.

The Horizon Formative Evaluation Policy is meant to be teacher driven and beneficial to teachers and administrators. Is it working for the former County of Warner teachers and administrators who have joined the Horizon Division through amalgamation? The interviews and the analysis of them will tell the tale.

## Analysis of Results: Part I

### Analysis of Responses to Specific Questions

11 people were interviewed: 3 administrators and 8 teachers. 5 males and 6 females were interviewed. It is interesting to note that two of the teachers are former administrators. As a whole, the group is highly experienced, even more so than was predicted when the proposal was made. 4 have 25 or more years of experience, 4 have 13 to 16 years of experience while 3 range from 8 to 11 years of experience.

As might be expected, the experience of these teachers span all grade levels and subject areas. Most have taught at both the elementary and secondary levels. Being in small schools, it is no surprise that they have a wide range of subject experience. 2 of the interviewees have experience limited to the elementary grades while 1 has only taught at the secondary level.

All of the interviewees taught in the County of Warner before amalgamation and have taught in the Horizon School Division since the amalgamation 3 years ago. Interestingly, only 4 have taught in any other jurisdictions.

### Past Experiences With Evaluation

Incredibly, one teacher claims to have never been evaluated during his over 25 year career! Three of the subjects had very infrequent evaluations (once every 5 years or less) and of those, one had no formal evaluation within his first 5 years:

“As a teacher it was interesting when I first started. I went through, I think, almost 5 years without any evaluation taking place. There was never an administrator coming into the room or a superintendent or anything formal.”

Another had one evaluation based on a 30 minute observation which was apparently enough to ensure not only continuing contract status but also permanent certification.

On the other hand, there are reports of overly frequent evaluations, from every year for several years to a multitude of formal evaluations within one year:

“Uh, my first year of teaching, I was IOTA-ized 11 times, and for the most part it was a rather negative experience. The only positive experience that I had with it that I felt was positive was that the deputy superintendent came in and gave positive suggestions rather than negatives. The most negative evaluations or suggestions I got were from the Vice-Principal. I think that I was evaluated more times than anybody else because I was a first year teacher - the only first year teacher in the school at the time and they were just practicing on me - using me as the guinea pig.”

Some of the teachers felt that there was a punitive component to these evaluations:

“ I found evaluation became sort of a dirty word, it meant that someone was looking for something to get you on.”

Another person, however, seemed to welcome the frequent evaluations as an opportunity for growth and did not feel threatened by them.

**Q:** Were you formally evaluated when you were a teacher?

**A:** 10 zillion times. I've got lots of written reports. The reason was that's when everyone was starting to do IOTA, and when they were doing Teacher Perceiver, and so that's what, I guess I was the guinea pig. They just said, "Can I try this with you?" and so I've had Teacher Perceiver done on me, had IOTA done on me, I had the Administrative, when I first got into the Vice-Principal position, so I've had everything.

**Q:** So do you feel that your experiences with evaluation have been fairly positive then?

**A:** My evaluations, yes.”

Even when the actual evaluation experience seemed to be a positive one, the major complaint was that the written reports were far too short, and in some instances there was no written report produced at all. In one case, the written report consisted of one sentence: "Keep up the good work on your whole language." Understandably the teacher was disappointed and puzzled as to how she could use this report for growth and/or for a reference.

The most negative passion was aroused when some of the interviewees discussed the IOTA instrument for assessing their teaching. Apparently some evaluators used this tool punitively, and did not take into account any shortcomings it might have.

"And then they brought in IOTA which I see as an evaluation form where you cannot fulfil all of the categories that are on there ... and there's always something missing, and I think that that is hard for teachers to accept because you're never doing well enough."

On the other hand two subjects specifically stated they like IOTA and found that it was useful to them in helping to improve their teaching. It seems that like most tools, IOTA and its application depend a lot on the attitudes and motivation of the evaluator using it. How it is used leads to a positive or negative perception of the instrument.

Not surprisingly, the idea of formal evaluation caused at least nervousness in most subjects. Some admitted to downright fear, while a few actually looked forward to it. One seemed to see it as a necessary evil:

"I really didn't look forward to it, but we all had to take our turn, it seemed, each year, so I knew my turn was coming eventually so it didn't really bother me too much, other than that it was one extra thing to think about during the year. But we usually found out at the beginning of the year whether it was going to be happening or not."

The administrators reported having used IOTA and other methods in their evaluation of teachers. In each case, they saw evaluation in a fairly positive light.

### The term “Formative Evaluation”

None of the interviewees claim to have heard of the term “Formative Evaluation” before the amalgamation into the Horizon Division took place. This is not to say that there was no formative evaluation happening. Several made sets of yearly goals which they attempted to work on. For example:

“It just happened, sort of thing. So what happened is like another teacher and I, she taught grade 6 and I had grade 5, we did a lot of goal planning and setting, that sort of stuff. So I think that formative evaluation went on, a lot of self-evaluation, also peer evaluation. at that school, we used to do, you know how you get all around in your groups and everything, so we did a lot of peer evaluation.”

Although some claimed to have never done any, it is hard to fathom teachers not working at improving their teaching in some way.

Most often these self-improvement plans are labelled as “Professional Development”. Many of the teachers claim to have done some of this type of thing on an informal basis. Ideas were “thought of” but they were not formalized in any way.

“I used to do something similar to that, but it was something that I did in my head: ‘I should do this, or I should do that’”

The most notable difference for these teachers is that they have now formalized this process. They are writing down their goals for the year, and they are reporting them to the administrator and perhaps other teachers.

#### Communication of the Horizon Formative Evaluation Policy:

For the most part, the interviewees reported that the policy was very effectively communicated to them. The one exception was a teacher who was returning from a leave. She felt that the expectations of the policy weren't clearly given to her.

“ I think at first it wasn't. When I first came in, the County of Warner schools had amalgamated with Horizon, and I had been out of teaching for half a year at that point, and when I came in I wasn't quite certain what was expected of me as far as a formative evaluation was concerned. I thought, 'Ok, now I've set goals for myself, now what?' I wasn't sure where to go from there, what I was supposed to do with it exactly.”

Another concern involved the education of new teachers to the division with regards to the policy. It seems that not all of the new teachers get the same information regarding expectations. As well, one teacher expressed concern that new administrators were not that familiar with the policy and needed to follow it more carefully.

“I think what we should really focus on is teaching the new people that come into the division about the policy, and maybe revisiting the people who've been working with it for a while, and really getting administrators to buy into it, because I don't think that some of them do.”

The administrators report that they have received more than enough information on the policy. The efforts of committee members to visit schools to explain the policy seems to have

been appreciated by both teachers and administrators.

**“Q:** Regarding the Horizon Policy of Formative Evaluation, has the policy been effectively communicated to you?

**A:** Yep. In numerous ways. In ... almost ad nauseum. So I’m very familiar with why and the process and yeah ... knowledge of it is not a problem. Communication is not a problem.”

### Helpful Aspects of the Policy

The interviewees seem for the most part to be pleased with the policy. Much appreciated is the feeling that competence of teachers is assumed and that teachers are therefore treated more as professionals. An administrator explains:

“I like this formative. I like how it assumes everyone to be competent and that, you know what it was like, you don’t have time to go around and evaluate absolutely everybody.”

Teachers like the freedom to focus on aspects of their teaching which concern them most.

“I think you have a whole plethora of choices, you know, and the way you’d like to present it, so I think it focusses in on something that you want to focus in on.”

Another aspect that is enjoyed is the focus of formative evaluation on the whole self.

Many teachers include personal (outside the classroom) goals which contribute to their personal and family wellness.

The fact that the policy forces a person to record ideas that were previously only “thought about” is important to many people in that it clarifies their focus. One teacher mentioned that the policy allowed them to initiate contacts with others and that it encourages more communication.

“I think it has made me initiate some contacts. There are some areas that I’d really like to improve on. It’s made me focus a little bit more and I think you’re a little less afraid, you’re just more inclined to go to those people, and say ‘help me out here’, ‘This is what I’m doing.’ You want more feedback.”

Teachers and administrators feel that the policy removes a lot of the pressure, both on the evaluators and those being evaluated. Administrators see savings in time since not every teacher has to be formally evaluated.

“Timewise, most definitely. You can kind of share some of the formative evaluations with assistant administrators. It’s not as pressing; you don’t have to sit down and write a six-page report after you evaluate every teacher. You discuss it, which is time consuming, you can discuss it on a little bit more informal basis. It allows you to find out how teachers are feeling comfortable about walk-ins, and seeing what you’re doing, if you’re welcome in the class to come in and observe. It just builds overall I think because of the teamwork idea.”

The collegial relationship and the encouragement of more equality between teachers and administrators is also seen as beneficial.

### Hindrances of the Policy

For the most part, teachers saw no ways that the policy might hinder their own teaching if it is followed the way it is written. It seems, however, that trust still needs to be developed in some cases. One teacher was worried that the current freedom being experienced might be compromised if teachers were forced to work on ideas from the categories of summative evaluation descriptors.

“Now if they start insisting on these 6 points, having an aim for each of the 6, then I’d be concerned, because there’s a couple of those, I don’t really see how they’re different from each other.”



Another was not convinced that all administrators had “bought in” to the policy. One teacher had been concerned at first that the policy was just “more paperwork”, but now was working his way into it:

“It hasn’t made a whole lot of difference to me, but it, once I get over my negative thoughts from previous times I think it can be useful. At the present time I’m trying to work my way into it, trying to do something constructive with it. The first couple of years I basically simply said, ‘Well this is just some more paperwork. Once I get that, I’ll put it in my filing cabinet and forget about it.’ It’s not the way to do it. I understand the benefits, the purpose of it, and it’s coming. It’ll take a little bit more time yet.”

On the other hand there were concerns from both teachers and administrators that some people were not taking the policy seriously. Feelings were that a person could actually do practically nothing and still be considered to have fulfilled the requirements of the formative policy. One teacher actually felt that there was nothing wrong with having more regular formal evaluations.

“ I don’t think it hurts people, either, as teachers to have a summative evaluation done once a year. Like I don’t think it hurts you.”

A need for more follow-up on the policy was seen, along with the need for some “fine tuning”.

## Effects of the Formative Evaluation Policy on the School

### I. Staff Morale

Teachers in one school reported no effect on staff morale by the policy. One of these teachers felt that for improvement to occur in staff morale, the teachers had to make a greater effort to work together:

“Well, this year no. I think for it to improve morale maybe the exercise has to be done as a staff where you all get together and put time aside and say ‘We’re going to work on formative evaluation as a group.’”

It should be noted that this same school was where concerns regarding the administrator’s dedication to the policy was questioned.

For the most part though, interviewees saw an improvement in staff morale, from “marginal” to very positive. These teachers felt more trusted and more professional. They felt less pressure regarding evaluation and therefore felt more able to focus their efforts on their teaching. One teacher expressed the idea of the “boss” being more accepting about what the teachers think, and that therefore the teachers felt better about their administrator:

“I think that people feel better about our ‘bosses’ saying to us: ‘We know you’re good, but good people can get better. How do you think you can get better?’ And I think it makes you feel better on the inside. It’s not such a judgmental thing, it’s a more accepting of what you think of yourself, you know, it’s more of a self-evaluation. It allows you to get better.”

In one school, it was mentioned that support staff was involved in the formative evaluations as well, which resulted in a greater staff morale overall.

“We had our support staff as well as our professional staff participate in the formative. I think it was really good, and what we did because we were a really small staff is share among our staff what we were going to do and so everybody kind of knew that this person was focussing on this area. I think it was positive.”

## II. Teacher-Teacher Relationships

Five of the people interviewed have not seen much, if any, change in teacher-teacher relationships that could be attributed to the formative evaluation policy. They did not share their plans with other teachers and haven't noticed much sharing amongst the other teachers.

One teacher in another school reported not seeing much change because there had been a great deal of sharing going on already.

“I wouldn't say here I've really noticed much in the way of a difference but then in this school everyone has been really sharing with what they've done, and I know that in other schools that I've been at it hasn't been that way, and I don't know if it was because of the type of evaluation or if it was just the atmosphere of the school”

At the same time, it was felt that the policy encouraged more sharing to occur.

“the idea of teachers being able to discuss things with colleagues without fear of going on record or, they may have had a class that didn't go so swell, they can talk to other colleagues about it and get feedback back from them, and it's allowed teachers to be a little bit more open, in going to observe other teachers and watching other teachers to pick up ideas from one another, and to share ideas, which I think makes for improvement as well.”

Teachers and administrators felt that there was less fear involved and a greater likelihood of teachers discussing problems with each other and in sharing ideas and materials. Teachers seem more likely to “pick up stuff” from each other. Teachers tend to watch out for each other more, according to one administrator:

“It just makes the people even more relaxed and enjoying what they do, and watching out for each other. And when we talk about formative, I'll ask if it's Ok to share one of their formative plans, for example one teacher wanted stuff on Special Education, so I asked another, could you, you know, so they sort of mentored more.”

It seems that teachers have been brought closer together. There are chances for a teacher to build a good relationship with another teacher. Administration can be very helpful by encouraging mentorships.

### III. Teacher-Administrator Relationships

For the most part, the interviewees felt that relationships in this area were positively affected by the formative evaluation policy. In one school though, little effect has been noticed.

A teacher here noted that:

“If you have an administrator who is strongly in favor of formative evaluation I think that can be a real plus, but if you have someone who insists it has to be written down, and hounds a person about it, then I could see that that could cause some tension.”

In another school, one teacher said that her ideas were shared with the administrator, but nothing further had resulted.

“Um, we’ve shared them. We’ve shared them with the administrator and he’s kind of indicated ‘Yeah, that’s a good idea’ but I think that’s as far as it goes now. I don’t know whether or not, what’ll happen in June, whether or not we’ll sit down and he’ll say: ‘Did you kind of go through this; I’m not sure about that.’”

Teachers with more positive views noted that the trust between teachers and administration had increased. One teacher said she was much more likely to sit down and discuss problems with the administrator:

“I am more apt to discuss how to get to my goal from where I’m at now and discuss how the personal aspect of my teaching styles, my personal life might be affecting getting, achieving that goal, with my administrator, whereas before I never would have.”

Others mentioned that they were more open with and had less fear in relationships with their administrators. The relationship seemed much more collegial and cooperative to them.

The administrators felt that communication was better and that relationships between themselves and teachers were eased with the policy. One mentioned that he felt that he was learning a great deal from his teachers that was applicable to his own teaching:

“it helps an administrator to possibly set some of his goals and learn and glean some ideas from colleagues as well for any classroom teaching that he’s doing”

Another helped to develop trust and a positive relationship with her teachers by sharing her own formative plans with them.

#### IV. Teacher-Student Relationships

It seems that often formative plans are student-centred and focussed. In those cases it is not surprising that the teachers and administrators feel that relationships between teachers and students have improved.

“Well, I would suppose that if part of your evaluative, part of your evaluation was simply to improve your relationship with students that I would hope there certainly would be an improvement, and if there wasn’t then you’d be looking for ways that you could improve and for reasons that it wasn’t so. I would say that if that was one of your focusses it would certainly improve that kind of relationship.”

An administrator observes:

“I would say my observations over the last three years would be that, yes, and I’ll qualify it by saying I know some teachers who within their growth plan have worked, have focussed on teacher - student relationships as part of their growth plan, so I would say that I’ve seen an improvement in those teachers because of the plan itself.”

Some teachers have adapted a formative system for their students where they set their own goals within a course:

“I try to use a similar approach with the students where they have to set goals, sort of a formative process as well.”

One school’s students’ union is encouraged to set formative goals:

“We’ve gone as far as, I’ve done, through Students’ Union, is a sort of formative planning: ‘What would you guys like to do?’ and that. So it’s sort of extended into that as well.”

One teacher reported that her plan allowed her to adapt to larger classes and improve classroom management, causing a positive effect for her students:

“I guess I can speak from a personal point of view. It probably took me half of a year at least, maybe longer, maybe two-thirds of a year to get used to a larger class, and so one of my goals was to try to develop classroom management skills for a larger group of kids and so I think because I was thinking about doing that, and because I was gearing myself towards it, it needed to be done, because it took me a while to, so I feel more comfortable because of it, because I kind of set my mind, I knew that that was going to be change for me, so that was good.”

An administrator noted that teachers seem more likely to take risks in the classroom and that this led to the students themselves to be more likely to take risks:

“I think teachers are a little bit more comfortable with taking some risks and taking some chances in the classroom, which allows the kids to take some risks and feel more comfortable with learning, and they’re not afraid to maybe make mistakes and learn from mistakes”

Although one teacher felt no real change in her personal relationship with students, she felt that they might be more relaxed with classroom visitors who were working with her on her formative evaluation:

“I wouldn’t say that it’s made a big difference ... really ... I’ve had teachers come and administrators come and sit in my class when they happen to have a free period and they happen to be walking by, whatever, and they’ll come in and just sit down and I feel very comfortable with that and I think the students do too. They’re pretty relaxed about it.”

Although one teacher did not consciously note any changes and another felt that her students were too young to really notice, one teacher put it this way:

“I would say that when you have a more relaxed teacher, you have a better teacher, and you have better relationships with your kids.”

## V. General School Climate

Three of the teachers have not noticed or could not specify any changes to school climate, while two others felt that school climate should be improved due to this policy. For one, just the fact that everyone was working towards goals should be enough to improve climate:

“I think everybody has an evaluation in place, so I suppose in that case that everybody’s working toward some goals which I think is important for school climate.”

The general feeling amongst the others was that the policy had a positive effect. One teacher felt that the policy could do nothing but good for school climate. A greater team approach was noticed in one case:

“Well, just more team - team oriented formative plans. Everyone feels that everyone is competent, therefore everyone is valued, and everyone’s got a direction, and that’s the students and everything else. As a whole, it just lends into the whole philosophy of what we have.”

One felt that relationships with the community have been improved in this way:

“I would say that it probably would enhance school climate because, because of all those things: relaxed teacher makes for relaxed kids, and relaxed kids make relaxed parents.”

An administrator felt that teachers were becoming more receptive to the public and that communication with parents had improved:

“I think too with the community, the professional staff of the school, the paraprofessionals in the school, the parents of the community are a little bit more open and while a teacher now possibly isn’t as afraid to explain what actually happened in the classroom, if it didn’t go right, or if they made a mistake, they’re not afraid to say ‘Oh gee, I made a mistake’ and allow the parents to hear that and know that it’s not going to affect their job or anything. They can gather ideas. Also, I think teachers are more receptive to the public, to listen to ideas, to try to gather an understanding of the students they’re working with from their parents, to help them in the classroom as well.”

#### Personal Feelings Regarding the Formative Evaluation Policy

All of the interviewees responded to this question in a positive manner. It seems that this policy is very well liked, although there seems to be some fear that it may not always be followed as written. As written, however, people really enjoy the freedom the policy provides, from the choice of areas to focus on to the ability to choose people to work with. One teacher wouldn’t mind seeing the process formalized a bit more:

“I think that there should be set appointments we have, whether it be once or just very near the beginning of the year and very near the end of the year, even though it’s such a crush, no matter what, the time constraints, there’s always such a crush, to see if you at least achieve some or part or where you wanted to; if you’ve had to adapt or totally change or write off some of the goals or ideals that you had I think that’s important. Revision is really important. And I think it’s Ok to revise but I also think if we’re going to talk about evaluation, then there has to be ‘something in writing.’ Some more in writing, some documentation or, I don’t know, it just doesn’t seem organized enough.”



Teachers like that the policy requires them to write down goals and that it encourages self-reflection. An administrator states:

“ I think that any teacher that takes a conscientious road towards the formative evaluation can do nothing but improve in their professional teaching position, whether it be an administrator or a teacher. I think that self-reflection is a very positive outcome of any kind of formative process.”

It is felt that if people are conscientious with the policy, there can be nothing but improvement. Teachers appreciate the fact that they are trusted and treated as competent professionals. The policy allows them to take more ownership and leadership in their own development as teachers and provides a more collegial atmosphere for this to occur. One teacher stated that his work with his formative plans helped focus:

“me and my teaching together. We seemed to be drifting apart.”

Teachers’ general feelings can be summarized by the thoughts of a veteran teacher:

“Formative evaluation is a positive thing as it’s written, outlined, and it states right there, you are a good teacher, this is here to try to help you improve, improving yourself even more than what you are, and I think that if it continues to be in that tone, it will be positive.”

#### Further Instructions and/or Workshops Regarding the Formative Evaluation Policy

The consensus is that there is little need for workshops regarding the formative policy itself, except for beginning teachers and administrators. Instead, people would like to see sessions with peers in their own subject areas and grade levels:

“ In a couple of years I wouldn’t mind having a little session, a one-hour session with peers to discuss this. We’re in a little bit unique situation here because I don’t have anybody else in my field here. I have to go to a larger town to get these things. I feel isolated. I don’t know if I’m on the right track always or not.”

“Perhaps not workshops but just being able to get together with others, for example in my end of things maybe teachers of English, and discuss more strategies or I don’t know, different ideas they may have in helping me achieve those goals, those academic goals for myself. I think that’s important.”

Administrators might benefit from looking at case studies and from discussing their experiences with other administrators. Some follow-up on the policy might be beneficial to them.

“You want, if you’re doing it, if it’s the correct way, I guess there is no correct way, but it might be nice to reinforce, if you could talk with other administrators, go over maybe some actual case studies, how they’ve handled some formative evaluation situations, and what the consequences have been.”

Another suggestion is to make a list of plans for people to examine:

“Like, it would be kind of neat if we had lists of things that people work on. You might go ‘Hey, I never thought of working on that thing.’ ‘Maybe I’ll try that this year’ or next year or whatever. Just as a suggestion, ‘cause sometimes you get into a ‘stuck’ mode, like ‘What do I want to do this year?’ or next year. I mean, we all have things we want to work on, but sometimes someone else will be working on something they thought of, and you can say: ‘Well that’s something I can work on too.’ And it doesn’t have to be: ‘You have to do these things’ but ‘These are the kinds of things that teachers are working on in this area.’ You know, if you’re interested, grab one.”

Several sample plans have already been included in the policy document, but it may be useful to produce a database of plans to help people with their ideas.

### Anticipated Effects on Future Teaching

The interviewees feel that improvement is bound to occur as long as the policy is followed. It is seen as non-threatening, yet it forces teachers to look at what they're doing. Teachers feel they can be more professional, not worry about punitive forms of evaluation, and work on new goals every year. For example, one teacher states:

“Well, I think that because I'm thought of as a professional, I can be more professional, and I can do the job I was trained to do without worrying about being evaluated by a tool that I don't think evaluates accurately, and I think that I will work on something new each year.”

The ability to focus on areas of need and the opportunity for continuous growth and learning is very important to those interviewed. Teachers see positive personal effects and the policy is described as a more human and common-sense approach for them.

An administrator sums up her feelings as follows:

“The way I look at it, it keeps me reflective and going back and reviewing what's happening in my world. Hopefully what happens is it keeps me stirred and enthusiastic and goal-setting and keeping my kids as my centre. It's just keeping that focus, that drive, and keeping me tuned to my world. Otherwise I get worried that I'm going to be complacent, and I don't want that to happen.”

### Further Administrative Comments

Administrators also produce formative plans which they share with the superintendent and/or his deputy. One of the administrators has established a mentoring relationship with another administrator:

“ I think it wouldn’t hurt to have more on summative, as an administrator. That’s even part of my formative plan, to improve my work on summatives. I even have a mentor.

**Q:** Tell me more about that, your own formative evaluation as an administrator.

**A:** That’s one, through my formative plan this year, that I thought, last year I had to do three summative evaluations, and I was very fortunate with the individuals that I was working with, they were very strong candidates, but I felt that, I used IOTA, I like IOTA, but I felt that there were other ways of collecting data. The way I use IOTA is different from how others do, because what I do is to find areas where the strengths and weaknesses were, and did multi-lessons and overlapped them, so that we could analyse that way. But I would like other means of collecting data. So I decided I wanted to do more research and legwork in that department, and see if I could get someone who has more training, so I found another Principal for my mentor, and I’ve worked with her, and we’ve been sharing back and forth and we’ve been looking for conferences together and so forth. And also what I’ve done is in staff, I’ve brought another staff member in to give another perspective, a teacher’s point of view, and so that was the formative plan that I developed this year.”

The administrators seem to have more concerns with regard to the summative process.

They see the formative evaluation policy as very beneficial. One stated that he saw the formative and summative policies as a good mix:

“ I think that the formative evaluation policy is a real good mix with the summative. I think that if you end up ever just doing the summative evaluations, then you’re deemed, as an administrator you’re deemed as the heavy and the fall guy, and I think that the formative policy allows you to work in conjunction with teachers so that you’re not always being deemed as the bad guy, the overseer, or the ogre or the guy that’s looking for everyone’s job. The formative process allows you to create a relationship that’s not just summative in nature, and I see that as a great strength. They seem to be a hand-in-hand thing. I wouldn’t want to have one without the other. I like having them both together. It’s a good marriage of both aspects.”

Another has found that the key indicators and descriptors used for summative evaluations can be very useful in formative evaluation as well:

“I like the idea of the key indicators and the descriptors being available. It gives somebody a concrete basis to see, both the teacher and the evaluator, if there is such a thing, some concrete basis to see specific areas that are being looked at, and I think that the areas that are being chosen are certainly one that would describe an effective teacher, if they go through the key indicators and the descriptors that are there, and I think that’s a good concept of the policy as well.”

There was some frustration expressed toward people who may not be giving the formative policy a “fair shot” and putting in the required effort, but on the whole the policy has allowed the administrators more chances to work with teachers in a positive way.

Finally, one administrator sums it up in this way:

“I know when we went up from the County of Warner to Horizon, talk about a night and day difference. It was just like someone took the load off your shoulders. It was just relaxing. I think administrators, it made them so they weren’t just viewed as always the tyrants, that they were viewed as more of a working relationship.”

#### Further Teacher Comments

Teachers on the whole see this policy as non-punishing and non-selective, and therefore not as threatening as previous evaluation policies. This creates a more positive atmosphere which leads to greater teacher satisfaction as this teacher describes:

“The fact that this is non-punishing, it is not selective, makes it far more positive, makes it much less threatening. Any evaluation is a threatening situation. Even if it’s formative, but the formative is the least amount that you can have, and this way they’re not picking anybody out. We all do our own formatives every year, and I think that that goes a long ways in teacher satisfaction and in making better teachers.”

Many teachers enjoy the personal components of their plans:

“We also look at some personal ones, we look at a balance in our life to make sure that, you know, we’re not focussing 100% of our time on education and teaching all the time. We need to look after ourselves as teachers and educators too and I think that the formative evaluation allows you to do that, put in goals such as take more walks in the evening with my wife or something which is necessary.”

Some teachers are still skeptical and worry that the policy may not be followed through and whether this policy will actually work. A desire for follow-up is shown by these comments:

“I think there needs to be a bit of follow-up with it, and they did a very good job of introducing it to us, but I think there needs to be a little bit of follow-up with it just to check and see how the formative evaluations are going in the school.”

One teacher, as described before, would prefer to see a more organized system with more put down in writing. Revision of plans throughout the year is seen as an important issue.

One teacher feels that the policy has to be flexible to adapt to changing needs. She hopes that the policy will be adopted throughout the province:

“Well, I think that we have to be flexible with this policy. As education changes and as people change, I think we have to build in some way that we can keep changing the policy as that it fits what we’re doing in our classrooms and so on. I’d like to see it across the province, because I think what this does is it makes sit down and evaluate yourself as a teacher.”

The greatest appeal of the policy for her is that it allows for serious self-evaluation, even to the point of asking the question: “Do I really want to teach?”

Finally, one teacher put it this way:

“Well, I just think it’s a really good program. I have liked it from day one. I said ‘This is good.’ ‘This is good.’”

## Analysis of results: Part II

### Themes Arising from the Interviews

From my rereading of the interview transcripts, certain themes have become apparent with regards to teachers, administrators and the evaluation process. Some pertain to evaluation in general, while others pertain more specifically to formative evaluation and the Horizon Policy.

#### 1. Fear of Evaluation and the Lessening of that Fear

As shown by the following interview excerpts, the fear of evaluation is very real for many teachers:

“I had the experience of when a parent decided that she didn’t like me, and so all of a sudden I was to be evaluated again, after I had just been evaluated, and that was a pretty horrible experience.”

“they evaluated the people they didn’t like. And they were on my case for a while, they evaluated me. I had a formal evaluation five years in a row. They were looking for something and they couldn’t find it”

“Uh, my first year of teaching, I was IOTA-ized 11 times, and for the most part it was a rather negative experience. The most negative evaluations or suggestions I got were from the Vice-Principal.”

“Oh, they made me really nervous, always made me really nervous.”

“When I first started in County of Warner they were very positive, but later on, late 80’s, early 90’s, I found evaluation became sort of a dirty word, it meant that someone was looking for something to get you on..

**Q:** So, fairly negative ...

**A:** Fairly negative experiences.”

Evaluations cause teachers stress, even when they are very confident in their abilities:

**Q:** Did you find the evaluations stressful then?

**A:** Yeah, I did. I’m confident in what I do and I think that most teachers are confident, but I think that the moment you have somebody at the back of the room scratching notes down I think it is stressful. It is stressful for me.”

There are teachers who look at evaluation as a challenge, as shown by this current administrator who had a positive outlook on her early evaluations:

“I’ve had no problems. But I’ve also had the attitude with evaluation as being a growing experience for me, so that my attitude is ‘You’re always welcome in my classroom and any ideas or suggestions that people might have to improve my teaching,’ and so I never had any problems. That’s the way I viewed it. And when they came in and we sat down after and ‘Oh, gees, I never noticed that.’ I think it really helped me in certain areas.”

It is apparent that the Horizon Formative Evaluation Policy has helped to lessen these fears, as shown by these comments:

“Well I think it takes off some of the pressure. I think that you can relax and say: ‘These are the things I want to work on’ and you don’t have to say: ‘Oh, three years from now I’m going to be evaluated or this year I’m going to be evaluated with a summative evaluation.’”

“I think people feel more trusted now.”

“If the Formative Evaluation is used for the intended purpose, I’m very pleased with it. It takes away a lot of apprehension, and fears of individuals coming to punish you. And that’s my experience over 25 years ... they give it to you as a punishment. Formative evaluation is a positive thing as it’s written, outlined, and it states right there, you are a good teacher, this is here to try to help you improve, improving yourself even more than what you are, and I think that if it continues to be in the tone, it will be positive.”



“ I think it’s been good, because it’s relieved the pressure off. I remember in the old County of Warner, they kept saying every so many years you had to have a summative evaluation, and what has happened and with support staff and everybody, what’s happened is everybody is feeling more relaxed.”

“ The formative evaluation has made teachers feel more professional and allowed them to have some input on what goes on in education”

This last comment, describing teachers as feeling more professional, explains a lot about why the fear of evaluation would be lessened. As teachers feel more professional and more trusted, the feeling that “someone is out to get them” disappears.

## 2. Dissatisfaction with Incomplete or Insufficient Evaluation

Teachers may have a fear of evaluation, but at the same time the feeling is quite strong that some form of evaluation must occur, and even more importantly that when an evaluation is done, it must be done fairly and comprehensively. Many of the interviewees describe little or no evaluation occurring:

**Q:** Before the amalgamation happened, how would you describe your past experiences with evaluation?

**A:** Done to me? Absolutely nothing.

**Q:** No evaluation of any kind?

**A:** No.

**Q:** No written reports?

**A:** No written reports.

**Q:** Even when you were an administrator?

**A:** No written reports on me or my character.”

The previous is an extreme case, but others also report very little in the way of evaluation:

“my experience as a teacher, I had, my first year of teaching I had the superintendent come in to do one 30 minute evaluation, and I never did have a Principal do an evaluation on me in my five years as a teacher. So I really only had one formal evaluation session, and that was 30 minutes in length, and that session got me my continuous contract and then I was given my permanent certificate without any form of evaluation.”

“I went through, I think, almost 5 years without any evaluation taking place. There was never an administrator coming into the room or a superintendent or anything formal. I imagine there were some informal ones but nothing that I ever heard of that ... and also it was kind of a question. “Gee, I wonder if I’m doing a good job or not?”, kind of thing, beginning to wonder after about 5 years. Finally, a superintendent did do a, more like a summative evaluation, prepared questions, and preset times as to when he would come in, come into the classroom as a teacher to observe a class.”

Teachers want relevant feedback when an evaluation takes place. The frustration that this teacher expresses due to an insufficient evaluation report is obvious:

“I had, when I went to the colony, I had two different principals, and the first time, I had a report done. It was extremely short. It was incredible. In fact, it was kind of upsetting because I’d never had a problem with evaluation, and in fact even you can learn a lot with it, but one of my evaluative reports stated ‘Keep up the good work with your whole language.’ That was my evaluation. So that didn’t work out very well. And I mean it was positive, and he was orally really positive, but nothing, for all the stress that it was worth, I didn’t get anything out of it on paper. Like, the next time I go for an interview, I can’t say ‘Oh yeah, and there was a guy , he once said ‘Keep up the good work. You’re doing great.’”  
The only written thing was just a one sentence thing.”

### 3. Teacher Professionalism: The Freedom to Choose and Focus

A recurring theme in the discussions with teachers and administrators is the feeling of satisfaction that arises from the Horizon Evaluation Policy because it allows the participants to focus on areas of interest and self-perceived need. As mentioned earlier, it causes teachers to feel more professional and trusted in their abilities. Almost every interviewee mentioned some aspect of this feeling. Some excerpts describing this follow:

“I think it allows us to, and it will allow me as a teacher to set some goals and to continue to grow and to continue to learn because it allows you to set short term goals and reach them. As the old goals are met, set new goals and continue. I think that’s, the continually learning and continually growing; and I think that’s an important part of the education system and it will allow me as a teacher to continue to do that.”

“I liked it because it was really geared, it made me sit down at the beginning of the year and think of what it was I needed to improve upon professionally, and it sort of is like making your long range plans but it is for your professional development. Yeah I think it’s good.”

“Well it, at the start of each year, it makes me think: ‘What do I want to aim for this year?’” “it zeroes my thinking in. It focuses me on my students.”

“it certainly lets you focus on some things that you might want to focus on that you might not otherwise focus on.”

“Yes, I think it’s been helpful. It’s helped me to set down and formulate more clearly for myself which direction I want to go. It wasn’t something I used to write down ‘til we had to live with this policy. It was something I used to do in my head, but having it written down, I can keep track of where I’m heading, and I don’t forget, sort of, what goals I’ve set for myself. I think it’s been helpful in that way.”

One teacher uses the following wording to describe how the policy has benefitted him. Is it really true that teachers need to be “forced” to participate in activities that enhance their professionalism?

“Personally it’s been helpful to me because it’s forced me to sit down and look at myself in a formative manner. So it’s forced me to evaluate myself formatively, and put myself on a growth plan.”

#### 4. Teacher Professionalism: Is the Other Guy as Professional as Me?

It is interesting that teachers appreciate the professionalism and freedom that the policy allows, but there is still the feeling that perhaps they would not do a formative evaluation unless there is some kind of external pressure applied. It seems especially apparent for “the other guy”. Some of the interviewees feel that others might take advantage of the policy’s freedom and not due an adequate job. An administrator had this feeling:

“I feel that the value of it depends on the seriousness in which its taken by the individual teachers. Some teachers really take advantage of it, in which case it’s an extremely useful tool, and some teachers sort of give lip service to it, in which case it’s not really very useful for them.”

A teacher seemed to feel the need for more external control:

“if we could do something like that a bit more formal it might be a little bit better to just see whether you’ve truly achieved those goals by a certain time or if you’ve worked on them or you’ve thought about them even.”

Another wondered if motivation might be a problem:

“I suppose that if you weren’t motivated to do anything, you could do nothing, you know. You could say that you’re doing it, because you do your plan, submit

it, but then not seriously try to gear the things that you're doing and whatever, your workshops and that kind of thing towards that. I think that would be possible to do that."

##### 5. Development of Trust: Teacher-Administrator and Amongst Teachers Themselves

One of the key ideas behind the Horizon Formative Evaluation Policy is that teachers are assumed to be competent. Hand-in-hand with this is another equally important assumption: that administrators are assumed to be competent as well. For the policy to work as it is meant to, both of these assumptions must be lived up to. There is evidence from the statements of some of the interviewees that these assumptions and the level of trust needed for the policy to be successful are still being worked on.

A teacher describes how a lack of trust might develop:

"The only problem I've seen, and it hasn't caused me any problems, but I could see that it might be a problem is that I've had administrators who have insisted that the formative evaluation be handed in. I've had some who wanted to put it in a file, as part of your own file"

She goes on to state:

"I think that administrators have to buy into the whole thing as well and I'm not sure that some of them do."

And finally:

"If you have an administrator who is strongly in favor of formative evaluation I think that can be a real plus, but if you have someone who insists it has to be written down, and hounds a person about it, then I could see that that could cause some tension."

Another teacher was concerned that the Formative Evaluation Policy might be changed so that certain topics might be insisted upon at the discretion of the administrator:

“if I was forced, say I had to have one from each section, some of those sections I’d have to do some thinking about. Also it would bother me ... the Principal has been really good about when he interviews us concerning it. If we had an administrator who really insisted on some really fine detail, I’d start becoming worried also, but if the person you’re presenting to is really there just as a listener, so he knows that you’ve thought about it, that’s fine, but if it ever gets to a point where you must have these 6 points and one point with each one, then this is going to become a chore.”

At the same time, it seems that the following administrator is not ready to assume the competence and dedication of all of the teachers in his school:

“for those people that don’t really take it seriously, there’s no ... it’s sort of an open-ended policy, so people can use anything, as a result the people that don’t take it seriously will come up with a plan that, in my view, there just doing it because they have to and it’s simple and they’re not using it for growth, they’re just doing it ‘cause they have to.”

One teacher is gradually developing more trust with his administrator:

“I am able to discuss my formative evaluation with the principal, and it’s on a constructive basis, it’s positive, so we discuss things without having to worry about somebody taking notes down on you and then using it against you. So I can be more open with the principal on this.”

It seems that the schools that have adapted most readily to the new policy are those that had already built a good relationship between the teachers and the administration. In the view of one administrator:

“I think we all work on a collegial level rather than a top-down type of method, but one level playing field where everyone has something to contribute in a team approach.”

He goes on to say:

“with my administrative philosophy that there shouldn’t be one guy at the top, it’s a team effort, and that an administrator is on the same level as teachers, the formative evaluation allows that and it helps an administrator to possibly set some of his goals and learn and glean some ideas from colleagues as well for any classroom teaching that he’s doing, or gather information that he can pass on to other teachers when they’re going through the evaluation ... share the wealth.”

Another administrator in a school where the policy has been readily accepted describes how she shares her own evaluation with her staff:

“I share every, I don’t know if other administrators do it, but I share my formative with each of my staff, and that way it relaxes the feeling, and mine is usually done through illustrations and through written.”

A member of the school’s staff expresses her positive feelings:

“ We’ve been really very lucky here. Even with the summative evaluations, I mean the Principals that we’ve had here have been so good about, they understand what kind of a process it is and how it makes people feel. I think once again, like I said before, with your bosses it’s more of an idea that they trust you, and they know that you want to get better at things, and I think that here we’ve been so lucky because it’s been the same, but maybe in many cases it’s been better”

Trust and support needs to also develop amongst the teachers themselves. Those schools that already had strong staff morale and relationships seemed to be the most successful in adopting the Formative Evaluation Policy:

“in this school everyone has been really sharing with what they’ve done”

One teacher has noticed a significant increase in sharing due to the policy:

“We’re more apt ... I feel we’re more apt to discuss problems that we may be having. I feel we’re more sharing than before because of it. Because we may have a problem, we may see that ‘Oh this, we’re having difficulty with this type

of teaching strategy we're supposed to use, now what do I do, how do I go about doing that?', and we're more apt to share ideas on how to achieve goals."

Another sees the increase in trust and caring amongst staff:

"it just makes the people even more relaxed and enjoying what they do, and watching out for each other."

Teachers still have the tendency to be isolated and to avoid sharing at times:

"I tend to think that some people are afraid to give of what they have and share what they have ... because somebody else might look better than they are ... 'You know, if I give away all my good stuff to someone else, they'll show up better on the evaluation than I will.'"

Several of the interviewees were unaware of teachers working together on formative evaluation. For example, this teacher:

"I haven't shared or asked any other teachers what they are working on this year, and I haven't shared any of mine that I know of with anyone."

One teacher expressed a wish to see more whole staff involvement, even though it had yet to occur:

"I think for it to improve morale maybe the exercise has to be done as a staff where you all get together and put time aside and say 'We're going to work on formative evaluation as a group.' I think it can be a morale builder for an individual. And it could be a morale builder for the school, but in my case I haven't seen that happen in my school as yet."

## 6. Develop the Teacher as a Whole Person

One of the most positive things about the Formative Evaluation Policy for many of the teachers and administrators is that the plans are not limited to teaching time only. Several describe how they have used their plans to focus on personal, outside the classroom concerns,



desires, and needs as well.

“ Just for myself, it’s helping me personally, non-school things, I tend to put them in, like to read more and watch less television.”

The above teacher goes on to describe how he sorts his personal slides for both home and school use.

Others have similar ideas:

“It makes me look at my personal as well as my professional life together as a combined, combined goals that I have to set, that complement each other, so I think it’s a good thing that way. I might not normally do that.”

“I see that a lot of teachers put personal things in, like ‘I’m going to spend more time playing squash’ or whatever. I didn’t know that that was part of formative evaluation. I thought that that was just something that had anything to do with school, but I think wellness, how you feel, and and if you feel good, you’re going to do a better job, so yeah, it should be part of formative evaluation.”

This teacher sums it up, showing how the Formative Evaluation Policy has helped her with the many stresses in her life:

“I’m not going to kill myself trying to be super-teacher, super-mom, super-woman, super-everything, you know, it’s much more a common sense approach, I think, to teaching, a much more human approach to teaching; it takes into account other factors than attempting to get that teaching award. That’s what I think.”

## Summary of Responses to Questions

Teachers' past experiences with evaluation tended to be fairly negative with a few exceptions. Some reported few if any formal evaluations and a great deal of apprehension was remembered. Teachers feel that if evaluations are to be done, they need to be done properly. Incomplete or haphazardly done evaluations are unsatisfying for teachers, both personally and professionally. The reliance on a single evaluative instrument was not seen as an effective strategy for evaluation.

The term "Formative Evaluation" was unfamiliar to the educators interviewed, although many had informally pursued some type of formative process. The fact that this policy did in fact formalize the formative process was appreciated by most.

The interviewees felt that the Horizon School Division Formative Evaluation Policy was effectively communicated to them. One teacher, however, felt that she was left to fend for herself after returning from a leave. It was expressed that new administrators and teachers need to be effectively trained with regards to the policy.

Teachers are especially appreciative of their assumed competence and the increased professionalism that goes along with that. The freedom in choosing areas to be worked on and the choice of colleagues to work with seems to be the major positive factor in the acceptance of the policy by former County of Warner teachers. Both teachers and administrators seem to appreciate the incentive to write down and formalize previously "thought of" goals. They seem to like how the policy allows them to focus on their teaching and the children they work with. The

removal of some of the pressure involved in evaluation was a positive effect. Administrators appreciate the opportunity to work with teachers in a more collegial manner and the chances for working as a team. Practical benefits for administrators include time saving since there is no need to write formal reports for all teachers. With the stress of teaching today, teachers appreciate that the policy allows them to include non-school items in their evaluation. Teacher wellness is a real concern, and this part of the policy has been seen as very beneficial to teachers.

There were few hindrances because of the policy expressed. There is a definite need for the development of trust amongst teachers themselves and between teachers and administrators. There was some concern that the policy might be misinterpreted and that principals might impose certain requirements causing a loss of the much appreciated freedom that is allowed. One administrator worried that some teachers might not take the policy seriously enough and may only give the policy “lip service”.

As far as the effect of the policy on the schools, it was felt that the policy should only lead to positive effects as long as it is followed in the spirit intended. Improvements in staff morale, teacher-teacher relationships, teacher-administrator relationships, and general school climate may not have yet been seen in all schools, but it is anticipated that positive effects would grow as the policy continued to be accepted. Some interviewees already expressed that there had been positive effects in these areas. Teacher-student relationships were seen as improving as well, if only because most teachers had their students as the focus of their formative plans.

Administrators found that they themselves had a need for developing formative plans and one made a point of sharing those plans with the staff. This would lead to the building of required

trust. The administrators seemed to have more concerns with regards to summative evaluation. Clarification and integration of the two evaluative types needs to be addressed.

Teachers especially enjoyed the freedom to focus on areas of perceived need in their own teaching situations. Self-evaluation is looked upon quite positively. One teacher felt that the process could be more formalized to ensure that everyone followed the policy correctly.

### Summary of the Themes

Fear of evaluation continues to be a major concern for most teachers and this formative evaluation policy has done a lot to lessen these fears. It seems clear for most of these educators that this new policy is an improvement over the one they experienced in the old County of Warner. Their attitudes toward evaluation have changed positively for the most part, and the feeling is that this can only lead to more positive teaching and learning experiences.

As earlier stated, teachers are very unhappy with incomplete or poorly done evaluations. As apprehensive as teachers may be about them, it is felt that evaluations must be done professionally, comprehensively, and fairly. Most see evaluation as a necessary evil that need to be executed in a proper manner.

Teachers want to be treated as professionals. They appreciate the freedom to formulate their own plans and to focus on their perceived areas of need that they see as best improving the teaching and learning situation in their classroom. Any removal of this freedom would be especially destructive to the success of the formative evaluation policy. Teachers want to focus

on their students, and they see this policy as allowing them and encouraging them to do that.

Some administrators feel that some teachers may not take the policy seriously and may try to get by with minimal effort and growth. Some teachers worry that administrators may not use the policy in the spirit it is intended. All teachers need to be treated equally as professionals. Perceptions of being “picked on” need to be eliminated.

Trust needs to be developed in both directions. This development of trust is indeed the key factor in the successful implementation of the policy. If the teachers and administrators who are using the policy do not use it in the spirit intended, then it is sure to fail. It is essential that both administrators and teachers do indeed live up to their responsibilities as professional educators. Administrators need to lead by example and to lead from beside to build a strong and trusting team. Teachers must be sure to fulfil their obligations regarding the policy. There is no room for giving the policy “lip service”. This would inevitably lead to a lack of confidence from the administration and a weakening of the policy. Too much weakening could lead to a collapse of the policy and a return to the much despised regularly scheduled summative evaluations.

As mentioned before, an important part of the policy that is seen as very positive for both teachers and administrators is the focus on the educator as a whole person. Teachers and principals live very stressful lives that are not confined to only a classroom, office, or hallway. Education is a twenty-four hour a day profession, and it is much appreciated that this policy allows those involved to address issues outside the school as well as those within it.

## Recommendations for the Horizon School Division

The Formative Evaluation Policy of the Horizon School Division has been well received for the most part by the educators from the former County of Warner schools. The key issue that will determine the ultimate success of the policy is the development and maintenance of trust amongst all users of the policy. Administrators, from the superintendent on down, must work with teachers in a collaborative way and build the trust required. Administrators have expressed some confusion with regards to the Summative Evaluation Policy as it relates to the Formative Evaluation Policy. The division needs to make sure that all administrators are clear on the application of these policies. New administrators need to be effectively trained in their use.

Teachers still fear evaluation especially in the summative mode. Administrators must take care that summative evaluations are not undertaken for frivolous reasons. Any perception of such activity would destroy any trust that has been developed. At the same time, any summative evaluations that are undertaken must be done professionally and comprehensively. There is no room for haphazard or incomplete evaluations. Again this would only lead to a loss of trust and erosion of the policy's goals.

Teachers must embrace the professionalism they desire. To make the policy successful, there is no room for slacking off or giving the policy "lip service". The trust needs to be developed in both directions. Administrators need to know that the teachers working with them are truly acting as professionals. Development of a real team can only occur if this mutual trust is established. Teachers need to work on trust amongst themselves as well. Informal sharing has

always occurred, but more can take place. A little effort is all that is required.

It is essential that all new educators in the division be thoroughly trained in the workings of the policy. Teachers need to be given chances to come together and compare their plans. Administrators as well would benefit from more interactions with their peers. In smaller schools like those in the former County of Warner, a teacher often is alone in a subject area. Those teachers especially need opportunities to interact with colleagues from other schools.

The Formative Evaluation Committee has compiled many examples of formative plans. The interviewed teachers would like to see even more examples. Perhaps some form of database could be compiled. The committee can continue to serve by updating the policy as changes are deemed necessary and by revisiting schools to acquire feedback on any concerns and to share positive experiences. The committee might develop a type of mediative function in the case of any difficulties that might arise in the implementation of the policy in a school, if any such concerns ever arise.

### Suggestions for Further Research

This study has dealt mainly with the Formative Evaluation Policy of the Horizon Division. Paired with it is a Summative Evaluation Policy which could also be well scrutinized. It is evident that some teachers and administrators are not entirely clear on the differences and similarities between the two. At times during the interviews, subjects started to discuss the summative and had to be brought back “on task”. Summative evaluations continue to be a major concern for

educators. As such, an in-depth analysis of the accompanying Horizon Summative Evaluation Policy and the reactions to it by teachers and administrators would prove to be very informative.

In the formative realm, it would be helpful to revisit former County of Warner teachers after they have used this policy for a few more years. It would be interesting to see if the policy works out the way they expect and if any of the concerns they have are realized. The key issue of the development of trust amongst the educators involved could be opened up to further scrutiny.

It might be interesting and useful to do a case study on one school to see how the policy is enacted. Two of the schools seem to have embraced the policy quickly, while two others have not as fully “bought in”. A case study in one of the latter schools may turn out to be very enlightening. Reasons for hesitancy in accepting the policy could be studied along with the progress of the policy’s implementation in a particular school.

The Horizon Formative Evaluation Policy is being shared with other school divisions in the province of Alberta. It would be interesting to examine the development of similar policies in these divisions. Studies could involve the acceptance of formative policies by the teachers and administrators in other divisions, modifications made in the policy by other divisions, and any problems with the implementation of such a policy in other divisions.

Members of the Horizon Formative Evaluation Policy Committee have presented several workshops to teachers and administrators in other jurisdictions. As one of the interviewees, who is a member of the committee, states:

“I’d like to see it across the province, because I think what this does is it makes you sit down and evaluate yourself as a teacher”



It will be very interesting to track this policy and to see whether it is indeed implemented in some form across the province. The teachers and administrators interviewed in this project appear to be confident that with the development of the required trust, this policy will be beneficial and successful in improving the teaching and learning environment in our schools.

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## Appendix

## Transcripts of Interviews with Teachers and Administrators

## Female Teacher #1

**Q:** How many years of teaching experience do you have?

**A:** Oh dear ... I have to count ...

**Q:** Well, it doesn't have to be an exact number.

**A:** About 14.

**Q:** 14, Ok, and have they all been in the County of Warner and Horizon?

**A:** Yep.

**Q:** Ok, and what subject areas and grade levels?

**A:** I've taught ... Special Ed. from 1 to 9, all schools, and I've taught pretty well all subjects from 1 to 6. That about covers it ... here and there.

**Q:** Can you describe for me some of your past experiences with evaluation? ...before amalgamation ... from the County of Warner days.

**A:** Ok, the County of Warner days. Evaluation before IOTA came in was not too bad. Ah, I was evaluated once when I was at Erle Rivers, and that was because I was a beginning teacher, and I had the superintendent come in and he just watched what I was doing and he wrote up a one-page evaluation ... general impressions on what I was doing well and so on ... and if there was anything I needed to work on. And then the second time I was evaluated because I had to do one to get a permanent certificate. That was when I was in Warner and it was the same sort of process. And it was fine. I didn't really have any problems with that particular kind of evaluation. And then they brought in IOTA which I see as an evaluation form where you cannot fulfil all of the categories that are on there ... and there's always something missing, and I think that that is hard for teachers to accept because you're never doing well enough ... I mean we're always trying to improve, but that one brought out areas that ... maybe were not concerns but didn't really apply to what you were teaching ... and the way that it was done then - with the people that were doing it with me - they sat down and they looked at every category whether what you were teaching at that moment applied to that category or not and so there were a bunch of areas where, you know, you're not fulfilling the requirements in that area, and so it looks bad, and I really didn't feel that it was a good, fair evaluation of what I was doing. Plus, I had

a wonderful experience, oh it wasn't a wonderful experience, but I had the experience of when a parent decided that she didn't like me, and so all of a sudden I was to be evaluated again, after I had just been evaluated, and that was a pretty horrible experience. They were looking for things ... looking for things and I think they were using it to try and see if I was really as bad as what this parent had said and so ... and I don't think that that should be used as a teacher evaluation ...

**Q:** It seemed like a punitive thing.

**A:** Yeah, and the parent decided "Oh, I don't like you, so I'm gonna get you evaluated." So I really didn't like that form of evaluation.

**Q:** Did you ever hear the term "formative evaluation"? Was that something that ...

**A:** Before?

**Q:** Yeah.

**A:** Before joining ... No, before joining Horizon I'd never heard of it.

**Q:** Did you do anything like that ... what was described?

**A:** Formative? Beforehand? No, we all just sort of sat back ... I mean we all made our plans that we want to work on ... this type of thing but it was never really written down ... and it wasn't ... you may have discussed it with some other colleagues but it wasn't a formal sort of thing ... so you always said: "Well this year I'm going to try to do this, gonna work on this", but it was never written down.

**Q:** Ok, now regarding the Horizon Formative Evaluation policy since Amalgamation; Has the policy been effectively communicated to you?

**A:** Yes, very much.

**Q:** And what about the actual policy? What about it has been helpful to you in your teaching?

**A:** What has? ... Well I think it takes off some of the pressure. I think that you can relax and say: "These are the things I want to work on" and you don't have to say: "Oh, three years from now I'm going to be evaluated or this year I'm going to be evaluated with a summative evaluation." You can say: "I'm doing the best job that I can. These are the areas I want to work on," and it takes off the pressure. I think we're all trying our hardest anyway.

**Q:** Is there any thing that's been a hindrance as far as the formative policy? ... Any problems that have arisen because of it.

**A:** Not for me, it hasn't.

**Q:** How do you feel the Formative Policy has affected the school, for example in the area of Staff Morale?

**A:** Well, we've got pretty good morale here at our school anyways, but I think that it really, like I said before has taken the pressure off; people are much more relaxed and they're much more into their teaching; they're teaching because they want to teach the kids, not because they're teaching for the IOTA form, if that makes sense, they're not teaching to the form, they're teaching the course, and they're not saying: "Oh, if I forget to do this part on this IOTA form" ... They're teaching the course and the kids and I think you do a better job in the long run.

**Q:** How about the area of Teacher - Teacher relationships? Have you noticed any differences there?

**A:** I wouldn't say here I've really noticed much in the way of a difference but then in this school everyone has been really sharing with what they've done, and I know that in other schools that I've been at it hasn't been that way, and I don't know if it was because of the type of evaluation or if it was just the atmosphere of the school but I tend to think that some people are afraid to give of what they have and share what they have ... because somebody else might look better than they are ... "You know, if I give away all my good stuff to someone else, they'll show up better on the evaluation than I will."

**Q:** How about Teacher - Administrator relationships?

**A:** Well, that's always been pretty good here too, but there was a lot of strain with IOTA. You always felt like you were being watched... Always felt like you were being watched. It's like much more collaborative, much more co-operative with the formative.

**Q:** Have you noticed anything with Teacher - Student relationships?

**A:** I would say that when you have a more relaxed teacher, you have a better teacher, and you have better relationships with your kids, and when the pressure comes off, because you don't have to worry about "that IOTA," I think that you have better relationships with the kids.

**Q:** And how about School Climate in general? ... including the whole school and community?

**A:** Well, school climate here has always been really good. Um, and I haven't been in another school since formative evaluation came in, but I would say that it probably would enhance school climate because, because of all those things: relaxed teacher makes for relaxed kids, and relaxed kids make relaxed parents.

**Q:** So what's your personal feeling then with regards to the formative policy?

**A:** Oh, I think it's excellent. It assumes that you are professional and I think that that assumption is a correct one. We are professionals and we shouldn't be treated as if we are not professionals. I think that we are the only profession that does this sort of thing or has done this kind of thing before.

**Q:** Is there any further instructions or workshops that you feel would be useful as far as formative evaluation?

**A:** Well, you know, every year, I mean you have your own ideas on what you want to work on, but then somebody else out of the blue will say: "Oh, well I was working on this" and you say "Oh, that's a good idea". Like, it would be kind of neat if we had lists of things that people work on. You might go "Hey, I never thought of working on that thing." "Maybe I'll try that this year" or next year or whatever. Just as a suggestion, 'cause sometimes you get into a "stuck" mode, like "What do I want to do this year?" or next year. I mean, we all have things we want to work on, but sometimes someone else will be working on something they thought of, and you can say: "Well that's something I can work on too." And it doesn't have to be: "You have to do these things" but "These are the kinds of things that teachers are working on in this area." You know, if you're interested, grab one.

**Q:** How do you see this policy affecting your teaching in the future?

**A:** Well, I think that because I'm thought of as a professional, I can be more professional, and I can do the job I was trained to do without worrying about being evaluated by a tool that I don't think evaluates accurately, and I think that I will work on something new each year.

**Q:** Ok, is there anything else about the formative evaluation policy that you wish to discuss that I haven't specifically asked about? Any pros or cons or?

**A:** Well, I just think it's a really good program. I have liked it from day one. I said "This is good." "This is good."

**Q:** Thank-you very much.



## Male Teacher #1

**Q:** How many years teaching experience?

**A:** 28

**Q:** How many years in the County of Warner before amalgamation?

**A:** 25

**Q:** The whole time in the County of Warner then. Cool. What grade levels?

**A:** Grade 5 through 12

**Q:** And subject areas?

**A:** My main subject areas are Math and Science, but I've taught all the subject areas.

**Q:** The first question is about your past experience before amalgamation with regards to evaluation. Can you tell us about your experiences with evaluation? How often were you evaluated?, for example.

**A:** Basically, evaluation under the County of Warner system was, they evaluated the people they didn't like. And they were on my case for a while, they evaluated me. I had a formal evaluation five years in a row. They were looking for something and they couldn't find it ... Because there wasn't anything. And so that type of evaluation is not really, in my estimation, ... educationally sound.

**Q:** And so, those were all summative evaluations.

**A:** They were all summatives, yes.

**Q:** So you got a report each time ... a written report?

**A:** No, sometimes I did and sometimes I didn't.

**Q:** So it wasn't necessarily a formal process.

**A:** It was supposed to be, but some of the principals didn't bother to do it.

**Q:** So I guess it would be fair to say that your experiences were fairly negative then.

**A:** Very negative. In fact, I was completely turned off.

**Q:** On evaluation?

**A:** Yes.

**Q:** Did you ever hear the term “formative evaluation” or did you ever have any formative evaluation in the County of Warner days?

**A:** No. The term was new to me.

**Q:** Ok, well then regarding the new policy that’s in place now, the Horizon Division Formative Evaluation Policy, has this policy been effectively been communicated to you?

**A:** I believe it has. I think I understand it.

**Q:** Do you feel that the policy has been helpful to you or hindering to you as far as your own teaching goes?

**A:** It hasn’t made a whole lot of difference to me, but it, once I get over my negative thoughts from previous times I think it can be useful. At the present time I’m trying to work my way into it, trying to do something constructive with it. The first couple of years I basically simply said, “Well this is just some more paperwork. Once I get that, I’ll put it in my filing cabinet and forget about it.” It’s not the way to do it. I understand the benefits, the purpose of it, and it’s coming. It’ll take a little bit more time yet.

**Q:** Ok, so you’re sort of working your way into it slowly.

**A:** As I’m realizing it’s not a punitive thing. It’s becoming more positive and I don’t mind it too much.

**Q:** So as far as your actual classroom teaching, you haven’t noticed much of a difference or much of an effect.

**A:** No.

**Q:** How do you feel that the Formative Evaluation Policy has affected the school, for example in the area of staff morale? Has it had any effect on that that you’ve noticed?

**A:** Marginally. But it’s positive. Once again, the staff ... I think they’re working their way into it. They’re welcoming this system because you know where you stand.

**Q:** Have you noticed any differences in teacher - teacher relationships? (Relationships amongst teachers)

**A:** Relative to Formative Evaluation? No.

**Q:** You haven't noticed anything like people working together on formative evaluation.

**A:** I haven't noticed any, but that doesn't mean that there hasn't been people might be working together on it. I don't know.

**Q:** How about Teacher - Administrator? Any change in the relationship? differences?

**A:** Yes, insofar as I am able to discuss my formative evaluation with the principal, and it's on a constructive basis, it's positive, so we discuss things without having to worry about somebody taking notes on you and then using it against you. So I can be more open with the principal on this.

**Q:** Ok. How about Teacher - Student relationships? Have you noticed differences there?

**A:** I haven't consciously noticed any.

**Q:** And finally, school climate, any differences there that you've noticed?The way the school is ...

**A:** I can't think of any. Possibly just within the staff, but the school in general, I don't know. I can't think of any, but that doesn't mean it doesn't exist.

**Q:** Would you say that in general that the staff has a more positive opinion of evaluation?

**A:** Yes. I think they have a much more positive opinion of evaluation. There's still the fear of summative evaluation. Always. But ... I don't think we've had any here that I know of.

**Q:** So what is your personal opinion with regards to the Formative Evaluation Policy?

**A:** If the Formative Evaluation is used for the intended purpose, I'm very pleased with it. It takes away a lot of apprehension, and fears of individuals coming to punish you. And that's my experience over 25 years ... they give it to you as a punishment. Formative evaluation is a positive thing as it's written, outlined, and it states right there, you are a good teacher, this is here to try to help you improve, improving yourself even more than what you are, and I think that if it continues to be in the tone, it will be positive.

**Q:** Is there any further instructions or workshops that you'd like to have with regards to the Formative Evaluation Policy?

**A:** Not directly, but in a couple of years I wouldn't mind having a little session, a one-hour session with peers to discuss this. We're in a little bit unique situation here because I don't have anybody else in my field here. I have to go to a larger town to get these things. I feel isolated. I don't know if I'm on the right track always or not.

**Q:** How do you see that this policy might affect your teaching in the future?

**A:** I really don't think it will affect my teaching.

**Q:** So you don't see any positive or negative affects in the future, as such.

**A:** No. If there are any effects, they will be positive.

**Q:** What further workshops ...

**A:** More interaction with colleagues and I'd like to see more examples, samples of written formative evaluations.

**Q:** Is there any other opinions regarding the formative evaluation policy, any thoughts you have that I haven't really asked you about?

**A:** Well, just a little bit more detail, more specifics. The fact that this is non-punishing, it is not selective, makes it far more positive, makes it much less threatening. Any evaluation is a threatening situation. Even if it's formative, but the formative is the least amount that you can have, and this way they're not picking anybody out. We all do our own formatives every year, and I think that that goes a long ways in teacher satisfaction and in making better teachers. That's all!

#### Female Teacher #2

**Q:** How long have you been teaching?

**A:** Eight and one half years.

**Q:** All in this area?

**A:** In the County of Warner, yes.

**Q:** So you've been in the amalgamated district for the last three years. What grade levels?

**A:** 4, 5, 7, 8, 9, 10, 11, 12.

**Q:** Subject areas?

**A:** English, SS, Art, Health, CALM, Geography, Psychology.

**Q:** What experiences did you have with evaluation before amalgamation? In the County of Warner, what kind of experiences did you have with evaluation then?

**A:** Uh, my first year of teaching, I was IOTA-ized 11 times, and for the most part it was a rather negative experience. The only positive experience that I had with it that I felt was positive was that the deputy superintendent came in and gave positive suggestions rather than negatives. The most negative evaluations or suggestions I got were from the Vice-Principal. I think that I was evaluated more times than anybody else because I was a first year teacher - the only first year teacher in the school at the time and they were just practicing on me - using me as the guinea pig.

**Q:** Now did you get a written report each time?

**A:** Ah, yes, I got a written report each time, and had the little line graph each time, which I didn't feel was highly positive, especially considering that it varied as to which class you happened to be teaching, which level and which subject.

**Q:** So each evaluation was based on one class.

**A:** Yeah.

**Q:** Did you have a summative report of the whole year after that?

**A:** The only one I had was for my permanent certification, and that came from the deputy superintendent, and what happened there was the superintendent was supposed to come in a second time to evaluate me; he did it the first time, and he was supposed to come in a second time, and he was unable to make the appointment, and he based my final evaluation on the deputy superintendent's evaluation rather than doing his own.

**Q:** Did you ever have any formative evaluations or did you realize what formative evaluation was?

**A:** I didn't have a clue. Never heard of them until we joined the Horizon division.

**Q:** Regarding the Horizon Formative Evaluation Policy, has this policy been effectively been communicated to you?

**A:** I think at first it wasn't. When I first came in, the County of Warner schools had amalgamated with Horizon, and I had been out of teaching for half a year at that point,

and when I came in I wasn't quite certain what was expected of me as far as a formative evaluation was concerned. I thought, "Ok, now I've set goals for myself, now what?" I wasn't sure where to go from there, what I was supposed to do with it exactly. I mean, that was something that was an unwritten rule within my own teaching anyway. I set goals for myself for that year, so it wasn't really clear and the personal and how is this evaluated and what exactly do I do with these now - it wasn't exactly clear.

**Q:** Ok, so later on then ...

**A:** It's been my third year into it, two and a half years into it. I feel more comfortable in discussing my formative plans, or my evaluation plans with my principal, my administration, but I feel that we're kind of lacking in a sense, like if that I guess I'm so accustomed to people saying: "Well, I'll be in your room to check on this subject at this time"., and so I'm accustomed to that. It's now, it's up to me to say I'd really like a summative or I'd really like to discuss this, I'm having a problem, what do I do? It's nice that it's much more casual but I feel that perhaps it, we might push it aside a little bit easier that way too.

**Q:** What about the actual policy is helpful or hindering to you in your teaching? First of all, what do you find about the policy that helps you?

**A:** It makes me look at my personal as well as my professional life together as a combined, combined goals that I have to set, that complement each other, so I think it's a good thing that way. I might not normally do that. I ... I like how it's very casual but I'm not sure ... what else. I think that's it.

**Q:** Looking at some ways that the Formative Evaluation Policy may have affected the school, for example staff morale. Have you noticed any change in that with regards to the policy?

**A:** Overall, yes. The staff morale regarding evaluation as a whole has gone way up, particularly at this school. We were very negative toward the style of evaluation that was used previously. We hated it. Quite bluntly, we hated it. It was so structured and so rigid it felt confining in teaching styles and expectations. It didn't take into consideration personal goals or expectations either.

**Q:** How about Teacher - Teacher relationships? Any change in that?

**A:** We're more apt ... I feel we're more apt to discuss problems that we may be having. I feel we're more sharing than before because of it. Because we may have a problem, we may see that "Oh this, we're having difficulty with this type of teaching strategy we're supposed to use, now what do I do, how do I go about doing that?", and we're more apt to share ideas on how to achieve goals.

**Q:** How about Teacher - Administration relationships?

**A:** I think I'm ... Let's see, I've worked with four different Principals at this particular school, and I ... with the formative evaluation I'm more apt to sit down and discuss other problems, other than strictly scholastic achievement problems. I am more apt to discuss how to get to my goal from where I'm at now and discuss how the personal aspect of my teaching styles, my personal life might be affecting getting, achieving that goal, with my administrator, whereas before I never would have.

**Q:** How about school climate?

**A:** Well, when staff morale goes up, school climate is great ... Happy, happy, happy.

**Q:** How about Teacher - Student relationships?

**A:** I wouldn't say that it's made a big difference ... really ... I've had teachers come and administrators come and sit in my class when they happen to have a free period and they happen to be walking by, whatever, and they'll come in and just sit down and I feel very comfortable with that and I think the students do too. They're pretty relaxed about it. But I don't think it's really, formative evaluation hasn't really affected my relationship with my students.

**Q:** What is your personal feeling with regards to this Formative Evaluation Policy?

**A:** At this point I like it. I like it. But then, I've just recently made quite a shift from teaching Jr./Sr. High to teaching grade 4/5 and it sets up whole new parameters for me as far as teaching style and goals and everything. It really makes a difference as far as seeking help perhaps, so I think it's been a good thing for me. Maybe at first, when I first came in I thought there weren't enough guidelines, or examples, or something telling me how I'm supposed to go about this, but I'm the No. 1 procrastinator, and I can see this being a problem for you if you procrastinate at all, setting your goals at the beginning versus part-way through your year, and maybe setting up a definite time that, Ok, on this day we're going to discuss your goals at this point and one third of the way through, and two thirds of the way through, and then at the end, perhaps, if we could do something like that a bit more formal it might be a little bit better to just see whether you've truly achieved those goals by a certain time or if you've worked on them or you've thought about them even. Sometimes you don't have time to think about them.

**Q:** What further instructions or workshops would you like to see, or would you like to have regarding the Formative Evaluation Policy?

**A:** Um ..., Perhaps not workshops but just being able to get together with others, for example in my end of things maybe teachers of English, and discuss more strategies or I don't know,

different ideas they may have in helping me achieve those goals, those academic goals for myself. I think that's important.

**Q:** How do you feel that the policy will affect your teaching in the future?

**A:** I'm not going to kill myself trying to be super-teacher, super-mom, super-woman, super-everything, you know, it's much more a common sense approach, I think, to teaching, a much more human approach to teaching; it takes into account other factors than attempting to get that teaching award. That's what I think.

**Q:** Is there any other opinions you have regarding the policy?

**A:** No, I don't think so, other than I think that there should be set appointments we have, whether it be once or just very near the beginning of the year and very near the end of the year, even though it's such a crush, no matter what, the time constraints, there's always such a crush, to see if you at least achieve some or part or where you wanted to; if you've had to adapt or totally change or write off some of the goals or ideals that you had I think that's important. Revision is really important. And I think it's Ok to revise but I also think if we're going to talk about evaluation, then there has to be "something in writing." Some more in writing, some documentation or, I don't know, it just doesn't seem organized enough. I think maybe it's just the school or maybe it's just me, I'm not sure. It may be that the Principal has a file on me I don't know about. That's the way it is. I don't think it hurts people, either, as teachers to have a summative evaluation done once a year. Like I don't think it hurts you. Then if you've got an administrator or a fellow teacher popping into your classroom every so often, then that's as good as a written summative. Then at least you can discuss what went on, and perhaps the average crazy wild day when the kids are hanging from the rafters is as good as any - those are maybe even the better days to be evaluating, have a co-worker come in and say "Gee, wow, I'm not the only one with those difficulties. I don't feel so bad then." It's just a thought.

**Q:** Ok!

#### Male Administrator #1

**Q:** How many years of teaching experience do you have?

**A:** 25, 5 of that in administration.

**Q:** All of them in this area, right? 22 in the County of Warner and the last three in amalgamated Horizon district.



A: Correct.

Q: Ok, and you've taught various grade levels.

A: That's right. I started out in the high school for 8 years, and I taught 12 years at the elementary, and the last 5 or 6 here at this school.

Q: I wanted to ask you about your past experiences with evaluation, before the amalgamation took place. What kind of experiences have you had with evaluation?

A: As a teacher it was interesting when I first started. I went through, I think, almost 5 years without any evaluation taking place. There was never an administrator coming into the room or a superintendent or anything formal. I imagine there were some informal ones but nothing that I ever heard of that ... and also it was kind of a question. "Gee, I wonder if I'm doing a good job or not?", kind of thing, beginning to wonder after about 5 years. Finally, a superintendent did do a, more like a summative evaluation, prepared questions, and preset times as to when he would come in, come into the classroom as a teacher to observe a class. Also, prior to that I guess as administrator with the County of Warner, I had one done fairly soon. The first year in administration was kind of a temporary position, or probationary, so there was an evaluation done. It was a kind of a summative thing. Again the superintendent sent out question surveys to staff members, to parents, and also did some observations within the school as to what was actually going on. He wrote up a formal report type of thing.

Q: So how would you say your experiences were? Would you say they were fairly positive, or more negative, or somewhere in between?

A: Most of mine were really positive. Like I say, with the first 7 years without anything it was kind of "Gee, it was kind of nice to have someone finally come in and do something." And then, when the evaluation turns out to be ... and I think it depends on the person evaluating, a positive experience and a learning experience, where he comes in and says, "You know, we're here to help", it's not a type of thing where "My decision is gonna decide whether you make it or not" type of thing, or lose your job type of thing. I also had a, in the beginning stages, the IOTA. The IOTA was famous in the County of Warner, and I had one of those done, again in a positive light. It was presented to me by an administrator in a positive way, looking for things that could be worked on, looking for positive things, and talking about those as well, so I would say it was a positive experience.

Q: So now the Horizon Policy ... Oh, first of all, did you ever hear the term "formative evaluation" before, or did you use that?

**A:** Before we amalgamated with Taber, no. It was a cyclic thing with the County of Warner, every 5 years we were supposed to have kind of a summative evaluation done, for teachers, and I'm not sure how it was done with administrators. I wasn't in administration too much until amalgamation, a year or so.

**Q:** So regarding the Horizon Formative Policy, do you feel that the policy has been effectively communicated to you?

**A:** Yeah, I think it has. When we amalgamated with the former Taber School Division to become Horizon, they had a very good team in place of teachers who had worked on the program. I think former administrators and division office people who had all worked on it, made a good attempt to come around to all the schools and set up inservice programs for teachers and for staff. The written material that was made available to us outlining the, defining formative and summative evaluation, the policies that were developed, the written materials as to samples of formative evaluations were all there. I think it was well done and well described initially.

**Q:** How do you feel that the policy has been ... has it been helpful to you? Both administrating and teaching ...

**A:** I think it has; it's been a little difficult getting to, like I said we had all the material, and then there's been the time factor of course that's involved. But one thing I think that it did do was kind of turned around staff morale and the idea of, rather than a hierarchy in education where administrators are on one level and teachers are on another, it kind of leveled it out so we're all teaching professionals, and it made teachers feel like professionals and that they had some contribution to make, which is my belief as an administrator, that I think we all work on a collegial level rather than a top-down type of method, but one level playing field where everyone has something to contribute in a team approach.

**Q:** As far as the Formative Evaluation Policy and how it's affected the school, I was going to ask you about staff morale ...

**A:** The formative evaluation has made teachers feel more professional and allowed them to have some input on what goes on in education, which, as I said, I feel that they are professional educators, and so it's improved morale in that way.

**Q:** How about Teacher - Teacher relationships? Any differences there?

**A:** Yeah, as well, the idea of teachers being able to discuss things with colleagues without fear of going on record or, they may have had a class that didn't go so swell, they can talk to other colleagues about it and get feedback back from them, and it's allowed teachers to be a little bit more open, in going to observe other teachers and watching other teachers to

pick up ideas from one another, and to share ideas, which I think makes for improvement as well.

**Q:** Teacher - Administration relationships?

**A:** Again, with my administrative philosophy that there shouldn't be one guy at the top, it's a team effort, and that an administrator is on the same level as teachers, the formative evaluation allows that and it helps an administrator to possibly set some of his goals and learn and glean some ideas from colleagues as well for any classroom teaching that he's doing, or gather information that he can pass on to other teachers when they're going through the evaluation ... share the wealth.

**Q:** Have you noticed any changes in Teacher - Student relationships?

**A:** Other than possibly, I think teachers are a little bit more comfortable with taking some risks and taking some chances in the classroom, which allows the kids to take some risks and feel more comfortable with learning, and they're not afraid to maybe make mistakes and learn from mistakes type of thing, some of the carry-over, I think that's the result of it.

**Q:** And how about school climate in general?

**A:** I think too with the community, the professional staff of the school, the paraprofessionals in the school, the parents of the community are a little bit more open and while a teacher now possibly isn't as afraid to explain what actually happened in the classroom, if it didn't go right, or if they made a mistake, they're not afraid to say "Oh gee, I made a mistake" and allow the parents to hear that and know that it's not going to affect their job or anything. They can gather ideas. Also, I think teachers are more receptive to the public, to listen to ideas, to try to gather an understanding of the students they're working with from their parents, to help them in the classroom as well.

**Q:** So, what's your personal feelings with regard to the Formative Evaluation Policy?

**A:** I, like a lot of the teachers around here, feel more professional. I think there's a carry-over in the formative evaluation policy as a positive, skill-builder if you wish, or a technique builder in teachers. It's carried over from the board to the administrators, type of thing, from the administrative staff at central office to teachers and to staff. I think it's made for a lot more collegial type atmosphere, not top-down type stuff.

**Q:** Are there any other further instructions or workshops that you'd like to see or have with regard to the Formative Evaluation Policy?

**A:** A couple of things, and I guess a couple of areas that I'd have difficulty with is initially getting it going and getting it started with teachers. You want, if you're doing it, if it's the

correct way, I guess there is no correct way, but it might be nice to reinforce, if you could talk with other administrators, go over maybe some actual case studies, how they've handled some formative evaluation situations, and what the consequences have been. Have they taken it a little bit further and maybe they've gathered some positive information that they can use in their own teaching careers, or just to do some actual case studies with other administrators or other teachers too. Kind of a follow-up to it.

**Q:** How do you feel that the policy will affect your own teaching in the future?

**A:** I think it allows us to, and it will allow me as a teacher to set some goals and to continue to grow and to continue to learn because it allows you to set short term goals and reach them. As the old goals are met, set new goals and continue. I think that's, the continually learning and continually growing; and I think that's an important part of the education system and it will allow me as a teacher to continue to do that.

**Q:** As far as your role as the administrator, what other affects do you think the policy has? Do you find it benefitting you as an administrator in certain ways?

**A:** Timewise, most definitely. You can kind of share some of the formative evaluations with assistant administrators. It's not as pressing; you don't have to sit down and write a six-page report after you evaluate every teacher. You discuss it, which is time consuming, you can discuss it on a little bit more informal basis. It allows you to find out how teachers are feeling comfortable about walk-ins, and seeing what you're doing, if you're welcome in the class to come in and observe. It just builds overall I think because of the teamwork idea.

**Q:** Do you see any negative effects at all? As far as administration goes?

**A:** Um, I haven't observed any yet ... negative effects. Other than the initial getting it started and then follow-up to make sure we're on the right track. I think there needs to be a bit of follow-up with it, and they did a very good job of introducing it to us, but I think there needs to be a little bit of follow-up with it just to check and see how the formative evaluations are going in the school or, like I said, discuss it with other administrators to see what they're doing with it and what's being used, continually to grow.

**Q:** Any other opinions regarding the policy?

**A:** No, I don't think so. I like the idea of the key indicators and the descriptors being available. It gives somebody a concrete basis to see, both the teacher and the evaluator, if there is such a thing, some concrete basis to see specific areas that are being looked at, and I think that the areas that are being chosen are certainly one that would describe an effective teacher, if they go through the key indicators and the descriptors that are there, and I think that's a good concept of the policy as well.

**Q:** That sort of leads more to the summative, but a person can use those to guide their formative.

**A:** I guess so, yeah. And the idea that I think is important in teaching at this level is that we look at some professional goals in our evaluation, but we also look at some personal ones, we look at a balance in our life to make sure that, you know, we're not focussing 100% of our time on education and teaching all the time. We need to look after ourselves as teachers and educators too and I think that the formative evaluation allows you to do that, put in goals such as take more walks in the evening with my wife or something which is necessary.

**Q:** One other thing regarding administration, has there been any chance for you to have formative evaluation yourself as an administrator? Has there been any opportunity for that, or would you like to see that?

**A:** Ah, yes, it has taken place. I've sat down with the superintendent and he's asked: "What are your formative plans and goals?" and once again the initiation was there and we sat down and talked about it. Now whether the follow-up comes or not we'll see. I guess at the end of the year. And again, it's a time factor, if we can follow-up on it. But yes, I have had some contact with the superintendent and the deputy superintendent with regards to my own formative goals and stuff.

**Q:** Ok!

### Female Teacher #3

**Q:** How many years of experience do you have?

**A:** I taught for 3 full years, then quit for a while, then went back for 11. This is my 11th year back, but part of that was part-time. 13, something like that.

**Q:** And they've all been in this general area?

**A:** Yep.

**Q:** So you've been at the County of Warner until amalgamation.

**A:** Yes.

**Q:** And your grade levels?

**A:** I've taught all the grade levels from 1 to 6.

**Q:** Ok, and all subject areas?

**A:** Yep.

**Q:** And you also served as an administrator.

**A:** For about 3 or 4 years.

**Q:** Before the amalgamation happened, what kind of experiences did you have with evaluation?

**A:** Well, I was evaluated two times. I was evaluated when I first started teaching by the superintendent of schools at that time, and that was for my permanent certification so he came down and looked at 2 or 3 lessons I guess, and decided whether or not I was capable of certification and of course that happened and when I started teaching with the County of Warner the second time I was evaluated with IOTA and that was a series of three visits I believe with pre-conference, post-conference, and IOTA.

**Q:** How did you feel about those evaluations?

**A:** Oh, they made me really nervous, always made me really nervous. And also, as an administrator, I evaluated a couple of people, so I did, I was on the other end of things as well. And the first time I did it using IOTA, that was under the County of Warner, and that was what I was trained to do, and the 2nd time I just used a combination of a checklist and things that I'd learned by just observing and reading some of the Horizon ... the Deputy superintendent's evaluations ... so I used kind of a combination too for that one.

**Q:** Before the amalgamation had you ever done any formative evaluation or had you heard of the term?

**A:** No ... No ... No ... I'd never heard of the term ... No.

**Q:** Moving on to the Formative Evaluation Policy of the Horizon division, has the policy been effectively communicated to you?

**A:** I believe so, yeah. Maybe partly because I was an administrator and they did a lot of talking to administrators before they inserviced, before we amalgamated, or just after we amalgamated. So, speaking from that point of view, yes, I think that I was very familiar with it. Not very, but I was familiar, I was comfortable with it.

**Q:** What about the actual policy has been helpful to you in your teaching?

**A:** The implementation of the policy? I think so, because you're allowed to pick what you think applies to you, and so, like one year when I was an administrator that was when the idea of site-based management was sort of new, so I thought well that would be a good project for me, to just really focus me in on something, and this year it had to do with dealing with single grades rather than multi-grade, my formative was, so yeah, I liked it because it was really geared, it made me sit down at the beginning of the year and think of what it was I needed to improve upon professionally, and it sort of is like making your long range plans but it is for your professional development. Yeah I think it's good.

**Q:** Can you think of anything that would hinder your teaching or any problems with that?

**A:** With the formative, if I wouldn't have done it, you mean?

**Q:** Well, with the new policy in place.

**A:** I suppose that if you weren't motivated to do anything, you could do nothing, you know. You could say that you're doing it, because you do your plan, submit it, but then not seriously try to gear the things that you're doing and whatever, your workshops and that kind of thing towards that. I think that would be possible to do that.

**Q:** How do you feel that the Formative Evaluation Policy has affected your school, for example in staff morale?

**A:** I think it's good, and I've only been in this school for a year, but I know that it was really beneficial to have our whole staff do it. We had our support staff as well as our professional staff participate in the formative. I think it was really good, and what we did because we were a really small staff is share among our staff what we were going to do and so everybody kind of knew that this person was focussing on this area. I think it was positive. Here, I would think that, as far as staff morale goes, that the new policy for support staff is good because our support staff here in this school were asking if they could participate in formative evaluations which I thought was positive. They wanted to be included and to do it.

**Q:** How about Teacher - Teacher interactions? You mentioned that you shared your plans.

**A:** That was at my old school, we haven't here. Just shared with the principal.

**Q:** Has there been a case of teachers working together?

**A:** Not here, not that I know of. But you know, I don't see anything really wrong with that. That would be good. That would be positive. And I think that you can learn a lot professionally from someone else that you're working with. So maybe that would be the door that would open.

**Q:** How about Teacher - Administrator relationships?

**A:** As far as the formative goes? Um, we've shared them. We've shared them with the administrator and he's kind of indicated "Yeah, that's a good idea" but I think that's as far as it goes now. I don't know whether or not, what'll happen in June, whether or not we'll sit down and he'll say: "Did you kind of go through this; I'm not sure about that."

**Q:** Have you noticed any difference in Teacher - Student relationships?

**A:** With me particularly? I guess I can speak from a personal point of view. It probably took me half of a year at least, maybe longer, maybe two-thirds of a year to get used to a larger class, and so one of my goals was to try to develop classroom management skills for a larger group of kids and so I think because I was thinking about doing that, and because I was gearing myself towards it, it needed to be done, because it took me a while to, so I feel more comfortable because of it, because I kind of set my mind, I knew that that was going to be change for me, so that was good.

**Q:** How about the general school climate? (Re: formative)

**A:** I don't know. I can't say. Maybe I'm a bad person to interview because I've just been here a year, and I have nothing ... I feel though, whether or not I've seen it here, I think that it could have a really positive effect. There's nothing that I can say that I can put my finger on.

**Q:** So what's your personal feeling regarding the Formative Evaluation Policy?

**A:** I think it's a good one, and I think that teachers feel good because they're trusted, their competence is trusted, or assumed, the policy says, but I think that makes you feel good, you know, rather than ... and I think it makes you want to take more ownership and more leadership with regard to what you think should be done. I think that that's probably the focus of it. I think it has accomplished that.

**Q:** What further instructions and/or workshops would you like to see with regard to formative evaluation? Do you think there's any need for that?

**A:** I, you know I guess if you were to offer one, it would be very hard because everybody's plan is so different, but I suppose maybe workshops that maybe would concentrate on the idea of doing it, and sort of sifting through your priorities perhaps, and sort of picking one that would be achievable. I don't know whether you could do a workshop in that, but ... Because everybody's so different, it's kind of hard to hold a workshop, isn't it, other than explaining the policy again and sort of going through it.

**Q:** Do you see any need to do that?



**A:** No, I don't see any need for that. And the other one would be kind of grasping for straws, I suppose.

**Q:** How do you feel that this policy will affect your teaching in the future?

**A:** I think that if each year you set a different goal, and you look back and you see whether or not you've done it, it affects it positively. I think that you should see some growth. I hope that you'd see some growth. I think I do ... yeah, I think I do. Just because you're more focussed upon doing something, learning something, trying something.

**Q:** Any other opinions regarding the policy, either positive or negative?

**A:** It was really different from what we worked under, under the County of Warner. And you know, when you go into a new system, you, first of all I was kind of skeptical, and maybe I still am kind of skeptical, because I'm sure there's some people that claim they do something professionally and don't, and I guess maybe you're kind of always thinking "Is that enough?" Is the policy, as it's written, enough, or do some people need a bit more of a push to really do it? That would be my only comment. But I'm assuming that because it's existed for 6 years, I guess in time, you would hopefully have some way of judging whether or not it worked ... Some objective way of judging whether or not your teachers are keeping up with professional development or whether or not it's benefitting - that would be my question. Is it happening? I guess that's what you're trying to find out, isn't it?

**Q:** Yeah! Thank-you very much!

#### Male Teacher #2

**Q:** How many years of teaching experience you have?

**A:** 27, I think, maybe 28.

**Q:** Have they all been in the County of Warner?

**A:** All but 6.

**Q:** And where were you for those ones?

**A:** County of Newell.

**Q:** So you've been in this amalgamated district for the last 3 years.

A: Right.

Q: What grade levels have you taught?

A: In this school, mostly 3's and 4's, I've had combinations and individually, and grade 2's.

Q: So mostly elementary levels.

A: Yes, all elementary.

Q: And all subject areas, I would take it.

A: Yes, except music. That's what I trade off for. I take science in return for music.

Q: Before the amalgamation happened, what kinds of experiences did you have with evaluation?

A: Seems to me, not a whole lot of evaluation. But it seemed like it happened once every 5 years or so. I'd be asked to, sometime in the year that the principal would come in and sit on a few classes, and that was about it.

Q: Did you get any written reports?

A: Yes. Usually a written report afterwards. The last one I'd done was through the IOTA. Before that I don't know what they called it. At the start of the year, it was usually a request at the start of the year, who wanted to be, or it was your turn to come up.

Q: So how did you feel about evaluation? Was it something you looked forward to, or something?

A: No, I really didn't look forward to it, but we all had to take our turn, it seemed, each year, so I knew my turn was coming eventually so it didn't really bother me too much, other than that it was one extra thing to think about during the year. But we usually found out at the beginning of the year whether it was going to be happening or not.

Q: Did you ever do any formative evaluation or did you ever hear of the term?

A: No, never heard of it 'til 3 years ago.

Q: So it's a term that's just come up with the evaluation.

A: Yep. Right.

**Q:** Regarding the Formative Policy of the Horizon division, has it been effectively communicated to you?

**A:** Yeah, I think it has, now that I've done it. When I first heard it, I didn't understand it. But we heard about it 3 years ago, and I've actually done it 2 years. The first year we didn't actually do it, we just heard about it, and didn't do it because it was too late in the year. So I've done it two years, and after doing it, actually I like it. It kind of zeroes my year in. It gives me something to aim for at the start of each year, I find.

**Q:** What about the actual policy is helpful to you for your teaching?

**A:** Well it, at the start of each year, it makes me think: "What do I want to aim for this year?" and I've found when I built my evaluation, I've also put the personal things into it. Things overlap. It's almost like a New Year's resolution type of situation. So I pick out about 4 or 5 topics that I will think about all year, and yeah, every once in a while I'll think about these topics during the year, am I doing what I was going to do or not? It kind of zeroes you in on a couple of points throughout the year.

**Q:** Can you think of anyway that the policy has hindered you or caused any problems, made it more difficult for you?

**A:** No, ah, but I'm concerned in a sense, right now it's a free thing where you can build your evaluation on any form. I'd be really concerned if they, of course I would have a problem, I believe there's 6 areas in the booklet, and I'd be concerned if you had to come up with one from each of those. Or if ...

**Q:** So you like the way you have the freedom ...

**A:** The freedom to pick and choose, because I have not picked one from each section, but if I was forced, say I had to have one from each section, some of those sections I'd have to do some thinking about. Also it would bother me ... the Principal has been really good about when he interviews us concerning it. If we had an administrator who really insisted on some really fine detail, I'd start becoming worried also, but if the person you're presenting to is really there just as a listener, so he knows that you've thought about it, that's fine, but if it ever gets to a point where you must have these 6 points and one point with each one, then this is going to become a chore. When I first heard about it, that's what I thought it was going to be, and I didn't like the idea at first, because I thought, "well this is just more paperwork", but after doing it once, and the principal accepting everything we said without really much question about it, I thought "Yes, this is good. It allows me to zero in on 3 or 4 topics for the year."

**Q:** How do you think that the Formative Evaluation Policy has affected the school, for example in the area of staff morale?

**A:** I don't think ... personally I don't think there's any effect at all, other than perhaps, since we're all doing it, it means everybody is thinking about something during the year, but I haven't got a clue whether, since I don't know what their aims were. I haven't shared mine with anybody except the Principal. I don't know what they're thinking about for the year. So as far as I'm concerned, it hasn't changed anything negative or positive, it's just there.

**Q:** So the next thing was the Teacher -Teacher relationships ... you said you haven't done any sharing..

**A:** No, I haven't shared or asked any other teachers what they are working on this year, and I haven't shared any of mine that I know of with anyone.

**Q:** How about Teacher - Administrator relationship?

**A:** Actually, I think that's helped because the administrator knows that you're thinking about something for the year. That is a positive I think. The administrator know what you have in mind for the year.

**Q:** How about in terms of Teacher - Student relationships?

**A:** Not directly, but a lot of my thoughts are aimed toward the student, and it's just cleared me up on what I want to do through the year with the students, so I think maybe I'm just approaching students in a slightly clearer way than I would. One of my thoughts this year was to try to enlarge the students, at the grade 4 level, enlarge the world, get them out of just this town, and so I've tried to think of things to do, like we've talked a lot about the news items each morning, what's happening in the world, not just here. And I've done a lot of map work with them. Not just this area, not just Alberta, but North America. I've used my 4 wall maps a lot, so it zeroes my thinking in. It focuses me on my students.

**Q:** Any changes with school climate in general?

**A:** No, I don't think I've seen anything. I suppose if I knew what some of the other teachers were focussing on, I might notice something, but I haven't noticed.

**Q:** Do you see any need for further instruction or workshops to do with the Formative Evaluation Policy and what kind of things would you like to see?

**A:** I'm happy to do it the way I'm doing it. Now if they start insisting on these 6 points, having an aim for each of the 6, then I'd be concerned, because there's a couple of those, I don't really see how they're different from each other. They seem to overlap a lot and so if they wereto insist on me having one from each of those, yes, I'd need help, but the way it is right now, where you have freedom of even how to write it, I'm quite happy doing it as

long as the administrator will accept it. I'm happy doing it, because it does zero me in on my aims for the year.

**Q:** How do you see the policy affecting your teaching in the future?

**A:** I think it'll ... it won't do any harm. Probably each year a lot of my things will overlap with things I've already done. I don't think every year I'll be able to come up with brand new ones, but I'll keep building and refining the ones I have already built on.

**Q:** Any other opinions on the Formative Evaluation Policy?

**A:** Just for myself, it's helping me personally, non-school things, I tend to put them in, like to read more and watch less television. For example my slides. I have a hard time finding them and I use them in school, it overlaps with the school. Because I have thousands of slides on the natural world, from all over the National Parks. But it's hard to find them. So one of my aims is to put them into a database - the pictures and information about the pictures. The database will tell me where each different slide is. All my slides are dated, the date they were taken. So if I type in, for instance, marmot, my database will tell me on what days I took a Marmot picture, and also will tell me whether it was a good picture or not such a good one, and then all my slides are arranged sequentially by date, so it gives me a date of Aug. 5, 1991, then I can go into that date and get a set of pictures. I'll know where the picture was taken, and I can pull it. It's a quick way of me finding a slide. Normally I know I have a slide, but I can't find it. In a slide, it's a little harder to find. It's not like a photograph, flipping through them. So that's something I've been working on this year; putting my better slides in a database so I can find my slides in a hurry. So it's a school overlap and it's for my own personal use also.

**Q:** Anything else?

**A:** I don't think so. It wasn't as scary as when I first heard it. Because of the freedom of how to write it up. But I have in the back of my mind that it may become a more difficult thing and then I'm not going to be happy. But right now it's a good focus at the start of the year.

**Q:** Great!

### Male Teacher #3

**Q:** How many years of teaching experience?

**A:** 26.

**Q:** Have those all been in this area?

**A:** Some here, some in B.C.

**Q:** Ok, how many have been in the County of Warner?

**A:** Too damn many.

**Q:** Ok, so quite a few. And then, in the last three years you've been in the amalgamated district. What subject areas?

**A:** Gulp, Primary 1, 2, 3, Grades 4, 5, 6, some Grade 7, 8, 9, some 10, 11, 12. A whole lot of different things.

**Q:** Have you ever done any administration?

**A:** Absolutely. Principal, Vice-Principal and acting Principal.

**Q:** Before the amalgamation happened, how would you describe your past experiences with evaluation?

**A:** Done to me? Absolutely nothing.

**Q:** No evaluation of any kind?

**A:** No.

**Q:** No written reports?

**A:** No written reports.

**Q:** Even when you were an administrator?

**A:** No written reports on me or my character. Have I done them? Yes, I've done them.

**Q:** So what kind of things did you do?

**A:** I did summative evaluations on beginning teachers mostly, for permanent contract status.

**Q:** So in your time at the County of Warner, you didn't have any evaluations done on yourself?

**A:** Not one recorded.

**Q:** Any informal type things?

**A:** Not that I know of.

**Q:** Ok, that's interesting. Then the Horizon Formative Evaluation Policy. Has the policy been effectively been communicated to you?

**A:** Yes it has.

**Q:** What about the actual policy has been helpful to you in your teaching?

**A:** I don't know that it's been helpful to me in the sense that it's going to help my teaching but it certainly lets you focus on some things that you might want to focus on that you might not otherwise focus on.

**Q:** Do you find anything about the policy that hinders you or causes any problems for you?

**A:** I don't think so.

**Q:** How would you feel that the formative policy affects the school, for example in terms of staff morale?

**A:** I don't know that it has any effect on it at all.

**Q:** How about Teacher - Teacher relationships?

**A:** I think it builds there when, if somebody's asked you to work with them on their evaluation. I think that you work to build a relationship. I think that on that basis it's done, but I can't see that it carries through to the staff extent. Teacher - Teacher certainly is important.

**Q:** How about Teacher - Administration?

**A:** I can't see that there's been any ... I don't know, I mean some people choose to use an administrator, but most people don't.

**Q:** Any effect on Teacher - Student relationships?

**A:** Well, I would suppose that if part of your evaluative, part of your evaluation was simply to improve your relationship with students that I would hope there certainly would be an improvement, and if there wasn't then you'd be looking for ways that you could improve and for reasons that it wasn't so. I would say that if that was one of your focusses it would certainly improve that kind of relationship. If you have a pretty good relationship with students already, and want to improve it, that would be, but if you're already happy

with it, then I don't think it would even be part of your evaluation.

**Q:** Any effects on general school climate?

**A:** I think everybody has an evaluation in place, so I suppose in that case that everybody's working toward some goals which I think is important for school climate.

**Q:** So what's your personal feeling with regards to the Formative Evaluation Policy?

**A:** I think it's Ok, I mean, it doesn't hurt you to do one. I think you have a whole plethora of choices, you know, and the way you'd like to present it, so I think it focusses in on something that you want to focus in on.

**Q:** Have you seen it as having much of an affect on your own teaching?

**A:** I think that I'm a better person because of it, but I don't know if it's affected my teaching a whole lot. I think it's certainly focussed me and my teaching together. I think that we were drifting apart every once in a while, and I don't see that many kids any more, that's the other thing, on a teacher to student basis I have mostly looks at programs and so it's helped me focus when I have kids to focus on, to focus on their individual needs.

**Q:** Do you see any need for further workshops or instructions re the Formative Evaluation Policy?

**A:** I don't.

**Q:** How do you see this policy affecting your teaching in the future?

**A:** Well, I'm certainly hoping that it'll allow me, well it does allow me to focus on areas of need, I suppose, more than anything else, and there's nobody coming in and looking over my shoulder and making sure I'm doing it. It's, it becomes a personal thing then, to improve, and I think those kinds of things help a whole lot. If you need that kind of improvement. I could be in a bunch of different ways too. That's the other thing about it.

**Q:** Any other opinion or thoughts on the Formative Evaluation Policy?

**A:** I don't think so. It's quite positive I think in most cases.

**Q:** Thank-you very much!



## Female Teacher #4

**Q:** How many years of teaching experience do you have?

**A:** This is my 16th year.

**Q:** Have they all been in this area? The County of Warner and now the Horizon Division.

**A:** Yes, they have all been here.

**Q:** And, what subject areas and grade levels?

**A:** I've taught grades 3, 4, 5, 6, Jr. High, Sr. High.

**Q:** And in Jr., Sr., High, the subjects?

**A:** Ah, French and English, and just about anything. Used to be options.

**Q:** Thinking back to before amalgamation, what were your experiences with evaluation?

**A:** When I first started in County of Warner they were very positive, but later on, late 80's, early 90's, I found evaluation became sort of a dirty word, it meant that someone was looking for something to get you on..

**Q:** So, fairly negative ...

**A:** Fairly negative experiences.

**Q:** Then, looking at the Horizon policy, has the Formative Evaluation Policy been effectively communicated to you?

**A:** To me it has been effectively communicated. I think I understand it, but I'm not sure it's the same for everyone.

**Q:** What about the actual policy has been helpful to you in your teaching?

**A:** Yes, I think it's been helpful. It's helped me to set down and formulate more clearly for myself which direction I want to go. It wasn't something I used to write down 'til we had to live with this policy. It was something I used to do in my head, but having it written down, I can keep track of where I'm heading, and I don't forget, sort of, what goals I've set for myself. I think it's been helpful in that way.

**Q:** I forgot, I was going to ask, before the amalgamation, had you done any formative evaluation?

**A:** No.

**Q:** Did you know of the term even?

**A:** Actually, no. I didn't hear about this term until amalgamation, but I used to do something similar to that, but it was something that I did in my head: "I should do this, or I should do that", but there are areas in formative evaluation that I didn't know then. Our formative, for instance, I always thought that everything you did in school had to be related to school and to education, you were doing, but I see that a lot of teachers put personal things in, like "I'm going to spend more time playing squash" or whatever. I didn't know that that was part of formative evaluation. I thought that that was just something that had anything to do with school, but I think wellness, how you feel, and if you feel good, you're going to do a better job, so yeah, it should be part of formative evaluation.

**Q:** Can you think that anything about the Formative Evaluation Policy that's hindered you or caused you any problems?

**A:** The only problem I've seen, and it hasn't caused me any problems, but I could see that it might be a problem is that I've had administrators who have insisted that the formative evaluation be handed in. I've had some who wanted to put it in a file, as part of your own file, and I've also seen that it hasn't always been communicated to new teachers very well.

**Q:** So this has happened since amalgamation, that they've asked you to put it in a file ...

**A:** Yeah. And they just can't do that. And also the way it's being communicated to people, I don't think that that's always very clear. I think that administrators have to buy into the whole thing as well and I'm not sure that some of them do.

**Q:** How do you feel that the formative evaluation policy has affected the school, for example in the area of staff morale?

**A:** Well, this year no. I think for it to improve morale maybe the exercise has to be done as a staff where you all get together and put time aside and say "We're going to work on formative evaluation as a group." I think it can be a morale builder for an individual. And it could be a morale builder for the school, but in my case I haven't seen that happen in my school as yet.

**Q:** Have there been any changes in Teacher - Teacher relationships?

**A:** That's a very interesting question and I'm not sure that I can answer that one either. Yeah, maybe it's easier to put yourself into the other guy's shoes with that, because after all they're going through the same sort of exercise with formative evaluation. I can see that it could improve Teacher - Teacher relations. I just haven't seen it happen in my particular case.

**Q:** How about Teacher - Administrator relationships?

**A:** If you have an administrator who is strongly in favor of formative evaluation I think that can be a real plus, but if you have someone who insists it has to be written down, and hounds a person about it, then I could see that that could cause some tension.

**Q:** Have you seen any effects as far as Teacher - Student relationships?

**A:** In my own case, yes, because now I tend to focus more on what I'm doing because I've set goals and I try to use a similar approach with the students where they have to set goals, sort of a formative process as well. Yeah, I think it can be used both ways.

**Q:** How about general school climate?

**A:** I think formative evaluation could help with school climate if everyone maybe gets together and shares their ideas, and their goal-setting. I think that could become a very positive thing for setting a favorable school climate. We've never done this as a group in our school, but I think maybe that's something a person could try, to talk about maybe when the school year starts to set aside half a day or time at a staff meeting to go through the policy, to set some goals together maybe, show the new ones how the Formative Evaluation works. I think that could be a good exercise.

**Q:** So what's your personal feeling with regards to the Formative Evaluation Policy?

**A:** I like the policy. I like the fact that now I have to sit down and put down on paper just exactly what it is I want to achieve, and I can keep track of it. That aspect I like about it quite a bit. I think it's helped me to focus on what I'm doing in education, what I'm doing in my classroom, and what I want to achieve as a person. Any negatives? Well, I think it lies in the interpretation of the policy. The policy itself I think is really good, but if you get someone interpreting it in a different way, it could be open to, maybe, abuse or ... but the policy itself, I like. It's the summative I have a bit of a problem with, but I guess that's not what we're discussing.

**Q:** What further instructions and/or workshops would you like to have with regards to the policy?

**A:** Well, I'm kind of lucky that I sit on that evaluation committee that deals with the formative, so I kind of feel that we have, I get it from the horse's mouth, so to speak, but I think what we should really focus on is teaching the new people that come into the division about the policy, and maybe revisiting the people who've been working with it for a while, and really getting administrators to buy into it, because I don't think that some of them do.

**Q:** How do you feel that this policy will affect your teaching in the future?

**A:** Well, I hope that it's going to help me to improve my teaching and what I do in the classroom and myself as a person. I like the personal aspect of the policy. You can basically focus on yourself, how you can improve yourself. I think it's made me sit down and think about what I'm doing instead of just having these random thoughts come to me at odd moments. Now I just have to sit down and write it down and go back once in a while and look at it and see if I'm really doing what I set out for myself at the beginning of the year. That aspect I like about it, because I like to have everything set down, otherwise I do forget. I have a mind like a sieve.

**Q:** Any other opinions regarding the policy?

**A:** Well, I think that we have to be flexible with this policy. As education changes and as people change, I think we have to build in some way that we can keep changing the policy as that it fits what we're doing in our classrooms and so on. I'd like to see it across the province, because I think what this does is it makes you sit down and evaluate yourself as a teacher and if at any time you have doubts about what you're doing then you can take steps to either get out of the profession, or do something different, or maybe think, "Well maybe I'd like to go back to Junior High". Whatever the case may be. I like it because it helps me to evaluate, and I've discovered over the last couple of years that yes, I really do want to teach, because I used to have doubts about that, but now I know I really want to teach and that it's brought me a lot of joy in my life and I've learned a lot. I think I've learned more than my students. That's what I like.

**Q:** Thank-you very much!

Male Administrator #2

**Q:** How many years of experience do you have?

**A:** Five years teaching, and this is my 6th year as a Principal.

**Q:** Was your teaching in the County of Warner?

**A:** Yep.

**Q:** And you were an administrator in the County of Warner for a couple of years before amalgamation?

**A:** Oh, I think I was 3 years as Principal in the County of Warner and now this is my third year with Horizon.

**Q:** When you taught, what grade levels?

**A:** 7 to 12

**Q:** And subject areas?

**A:** P.E., Social Studies, Math, English, Computers, a little of everything.

**Q:** What were your experiences with evaluation in the County of Warner, as far as yourself being evaluated, and the evaluations you did as an administrator?

**A:** Prior to becoming a Principal, my experience as a teacher, I had, my first year of teaching I had the superintendent come in to do one 30 minute evaluation, and I never did have a Principal do an evaluation on me in my five years as a teacher. So I really only had one formal evaluation session, and that was 30 minutes in length, and that session got me my continuous contract and then I was given my permanent certificate without any form of evaluation.

**Q:** Did you get a written report for that first one?

**A:** For that very first one I got a written report, a followup report, yes. Now when I first started as Principal in the County of Warner, I was instructed by the superintendent to not, my first year not to do any evaluation and instruction of teachers at all. It was felt that until I had some kind of formal training that I would not be deemed the "expert", and as a result I started to take a number of courses. We did an IOTA and ... Actually, IOTA was the main thrust of what we were doing at the time. So I took the IOTA training: 2 sessions of IOTA training in my first year as Principal there, and in my second year I started to do IOTA observations with my staff. At that time it was a cyclical rotation for teacher evaluation, if I remember correctly, and I think in my first year I did two ... formal IOTA-style observations - two teachers.

**Q:** Did you ever get evaluated as the Principal?

**A:** Yeah, at the end of my second year as principal I went through a summative evaluation. I was posted, my first year there I was posted and given a two-year posting, and so at the end, about half-way through that second year, they did an evaluation of me as Principal.

**Q:** In the time at the County of Warner, did you ever talk about formative evaluation or was that ...

**A:** No. I think it was always an underlying current; there was an expectation that people were supposed to be doing some kind of professional development, but that's really all it was considered at that time. It was Professional Development. There was really no focus on the formal process of formative evaluation.

**Q:** Regarding the Horizon Policy of Formative Evaluation, has the policy been effectively communicated to you?

**A:** Yep. In numerous ways. In ... almost ad nauseum. So I'm very familiar with why and the process and yeah ... knowledge of it is not a problem. Communication is not a problem.

**Q:** What about the actual policy has been helpful to you?

**A:** I'm going to answer that in two ways. Personally it's been helpful to me because it's forced me to sit down and look at myself in a formative manner. So it's forced me to evaluate myself formatively, and put myself on a growth plan. From a perspective as an administrator working with other individuals. That's my observation. I'm not being critical, that's an observation.

**Q:** Is there anything about the policy that you found to be hindering or causes problems?

**A:** Not hindering, although what I do find sometimes is it's a little bit frustrating for the people that I was just previously talking about, for those people that don't really take it seriously, there's no ... it's sort of an open-ended policy, so people can use anything, as a result the people that don't take it seriously will come up with a plan that, in my view, there just doing it because they have to and it's simple and they're not using it for growth, they're just doing it 'cause they have to. So I would say, in answer to your question, that I think that's a limiting factor, is that there's no accountability other than the fact at the end of the year the Principal has to report the fact that they either have or have not participated in a formative plan. And so any participation would receive a yes response to that.

**Q:** How do you feel that the policy has affected the school, for example in the area of staff morale?

**A:** When it was implemented when we amalgamated, people got a very positive feeling about the concept that they were being involved in it, because they now were seeing that summative was being taken away, and the responsibility for their personal development and growth was being put into their hands. So I think overall, at the time it was implemented there was a huge consensus that it was an excellent process, so I think that from a morale

perspective at least on that item it was perceived very strongly.

**Q:** How about Teacher - Teacher interactions?

**A:** I haven't seen very much. I haven't observed very much in terms of teachers working together on formative plans. I have only in one case in the last 3 years that we've been involved in this, can I think of situations where we have teachers working together on a formative.

**Q:** How about Teacher - Administrative relationships?

**A:** I would say by and large, from the formative process I don't see, I haven't seen many teachers, I haven't had very many teachers work closely with me on their formative other than to report to me. I've had nobody request me to do something for them. However, I do feel that the, not knowing exactly your question, I feel that the relationship between teacher and administrator has been eased by the fact that it's in writing, it has to be done. So it's now not the Principal forcing someone to do something that they don't know about; that the open communication that this is actually in place. It's the responsibility of the administrator to administrate it, or make sure that it's being administered. That has caused an ease between teacher and administrator.

**Q:** Have you noticed anything with Student - Teacher relationships?

**A:** That's a good question. I would say my observations over the last three years would be that, yes, and I'll qualify it by saying I know some teachers who within their growth plan have worked, have focussed on teacher - student relationships as part of their growth plan, so I would say that I've seen an improvement in those teachers because of the plan itself.

**Q:** How about school climate as a whole?

**A:** This plan was perceived as a very positive thing and I think it added to school climate. I think people thought it was a good idea, they felt more professional, and I think it has improved school climate because of that factor.

**Q:** What's your personal feeling with regard to the Formative Evaluation Policy?

**A:** In how it affects me as an individual teacher, rather than an administrator? Like I, said, I think it's forced me to sit down and be reflective and thus analyze what my strengths and weaknesses are. As a result of that, I think that any teacher that takes a conscientious road towards the formative evaluation can do nothing but improve in their professional teaching position, whether it be an administrator or a teacher. I think that self-reflection is a very positive outcome of any kind of formative process.

**Q:** You've already talked about the next question: How will it affect you in the future, both as a teacher and an administrator?

**A:** I don't find it as time consuming as I thought it would be, so I don't think it's, there's no negatives, I can't think of any negative way that it would affect me, other than the fact that when I see people that I deem aren't really giving this a fair shot, that I get frustrated by that. Because I think that it's an excellent opportunity, and some people aren't taking advantage of that. They're giving it lip service. It's a very small minority. I get frustrated by that. But I don't see that as a real negative problem.

**Q:** Is there any other comments re: the policy?

**A:** I think that the formative evaluation policy is a real good mix with the summative. I think that if you end up ever just doing the summative evaluations, then you're deemed, as an administrator you're deemed as the heavy and the fall guy, and I think that the formative policy allows you to work in conjunction with teachers so that you're not always being deemed as the bad guy, the overseer, or the ogre or the guy that's looking for everyone's job. The formative process allows you to create a relationship that's not just summative in nature, and I see that as a great strength. They seem to be a hand-in-hand thing. I wouldn't want to have one without the other. I like having them both together. It's a good marriage of both aspects.

**Q:** Any other thoughts?

**A:** Not directed at the formative process. No, I don't think so.

#### Female Administrator #1

**Q:** How many years of experience do you have teaching?

**A:** Since 1981 and 2 maternity leaves, so it's gotta be 13 or 14 years. Close enough.

**Q:** Of those, how many are administrative?

**A:** 8 years.

**Q:** And they were all in the former County of Warner and Horizon?

**A:** Yes.

**Q:** What subject areas?



**A:** First few years were just in elementary, Grade 5, when Vice-Principal I was Jr. High Language Arts, phys. Ed., and that sort of stuff.

**Q:** Can you tell me a little bit about your experiences with evaluation, first the ones you had done on yourself, and the ones you did while with the County of Warner, before amalgamation.

**A:** Well, I think I always did the formative that we use now. It's something that I always did. I always sort of set goals ahead of time of what I wanted to do and when I wanted to do it.

**Q:** Did you call it formative evaluation or is that term ...

**A:** No, never called it that term. It just happened, sort of thing. So what happened is like another teacher and I, she taught grade 6 and I had grade 5, we did a lot of goal planning and setting, that sort of stuff. So I think that formative evaluation went on, a lot of self-evaluation, also peer evaluation. at that school, we used to do, you know how you get all around in your groups and everything, so we did a lot of peer evaluation. So that's how I dealt with it just when I was teaching, and through professional development. Then when I started into administration, then I started getting inservices. I did Teacher Perceiver, I had been trained in Teacher Perceiver, in IOTA, and then some just general casual observation kinds.

**Q:** Were you formally evaluated when you were a teacher?

**A:** 10 zillion times. I've got lots of written reports. The reason was that's when everyone was starting to do IOTA, and when they were doing Teacher Perceiver, and so that's what, I guess I was the guinea pig. They just said, "Can I try this with you?" and so I've had Teacher Perceiver done on me, had IOTA done on me, I had the Administrative, when I first got into the Vice-Principal position, so I've had everything.

**Q:** So do you feel that your experiences with evaluation have been fairly positive then?

**A:** My evaluations, yes. All of them have been fairly successful.

**Q:** But even the feeling that you have about evaluation.

**A:** I've had no problems. But I've also had the attitude with evaluation as being a growing experience for me, so that my attitude is "You're always welcome in my classroom and any ideas or suggestions that people might have to improve my teaching," and so I never had any problems. That's the way I viewed it. And when they came in and we sat down after and "Oh, gee, I never noticed that." I think it really helped me in certain areas.

**Q:** Now regarding the Horizon Policy of Formative Evaluation, has the policy been effectively communicated to you?

**A:** Yes, I think so.

**Q:** What about the actual policy has been helpful to you?

**A:** Oh, extremely. First of all, I like this formative. I like how it assumes everyone to be competent and that, you know what it was like, you don't have time to go around and evaluate absolutely everybody. It used to be in the County of Warner you would set 3 years and you had to have a summative evaluation of some sort. Well, this is really nice, and it takes the pressure off of people, and also what I like about it with the formative is that people can just relax and tell me what their plans are, that they've, it's not so life threatening. We've talked about what I used to do years ago but it's putting it in more formalized. I've really liked that. I like it. I really like it.

**Q:** Do you have anything that's been a hindrance or a problem in any way in the Formative?

**A:** Just fine tuning of stuff. Like I'm on the Support Staff evaluation committee. We modeled it very closely on the one we have for teachers, and what I'm finding is just fine-tuning it. For example, if people are giving me a formative plan, should I be writing anything down, requesting if that's proper procedure? Administratively, making through that the follow-through is going through, and making sure ... What I'm finding is just making sure, "Where did everyone go?", I find with formative plans, if it's anything like goal-setting, they change, mid-way through the year they go "You know, I know I said this but this is taking more of a precedence", so keeping it updated, so that would be, and I wouldn't even include, or classify it as a hindrance, it's just a bug that needs to be worked out.

**Q:** How do you feel that the Formative Evaluation Policy has affected the school, first of all in the area of staff morale?

**A:** I think it's been good, because it's relieved the pressure off. I remember in the old County of Warner, they kept saying every so many years you had to have a summative evaluation, and what has happened and with support staff and everybody, what's happened is everybody is feeling more relaxed. Like it's not such a pressure point, and they can make their draft and then their goals. So, no, I think if anything it's improved morale.

**Q:** How about in Teacher - Teacher relationships? Any change there?

**A:** Like I say, just like support staff and everybody, it just makes the people even more relaxed and enjoying what they do, and watching out for each other. And when we talk about formative, I'll ask if it's Ok to share one of their formative plans, for example one teacher wanted stuff on Special Education, so I asked another, could you, you know, so they sort of mentored more. So if anything I think it developed it more.

**Q:** How about Teacher - Administration relationships?

**A:** It's been really ... no problems at all. None at all. If anything, just more communication. We talk about and share what we would like to do. We do a lot ... our formative plans go a lot beyond into our team plans too and we're finding that we're all interconnecting better, so that's helpful. That's an advantage to me, but it's an advantage that we're all sort of doing it.

**Q:** How about in Teacher - Student relationships?

**A:** Well, I'm finding that the formative plans are generally student-centred, student-focussed, so that's good, so I would, in my interpretation of that, it's student-centred, then I would say that if the progress is there, then I would say that student learning is improving. We've gone as far as, I've done, through Students' Union, is a sort of formative planning: "What would you guys like to do?" and that. So it's sort of extended into that as well.

**Q:** How about in the School Climate as a whole?

**A:** Well, just more team - team oriented formative plans. Everyone feels that everyone is competent, therefore everyone is valued, and everyone's got a direction, and that's the students and everything else. As a whole, it just lends into the whole philosophy of what we have.

**Q:** So what's your personal feeling with regard to the Horizon Formative Evaluation Policy?

**A:** I like it. I like it a lot. Like I said, it puts, it says to the people that they're valued and they're competent and that they're intelligent enough to see where they're going, that they don't need someone to oversee them every step of the way. What I like about it too is the sharing of it, because they share with me as an administrator, but what I'm finding with our support staff, it doesn't only have to be with the administrator. It can be with the Classroom Support Teacher. It can be with whoever they wish to share with. So I like the policy. I think it lends to what we are trying to develop here anyway.

**Q:** Is there any further instructions or workshops that you'd like to see with regards to the Formative Evaluation Policy?

**A:** I think it wouldn't hurt to have more on summative, as an administrator. That's even part of my formative plan, to improve my work on summatives. I even have a mentor.

**Q:** Tell me more about that, your own formative evaluation as an administrator.

**A:** That's one, through my formative plan this year, that I thought, last year I had to do three summative evaluations, and I was very fortunate with the individuals that I was working with, they were very strong candidates, but I felt that, I used IOTA, I like IOTA, but I felt that there were other ways of collecting data. The way I use IOTA is different from how

others do, because what I do is to find areas where the strengths and weaknesses were, and did multi-lessons and overlapped them, so that we could analyze that way. But I would like other means of collecting data. So I decided I wanted to do more research and legwork in that department, and see if I could get someone who has more training, so I found another Principal for my mentor, and I've worked with her, and we've been sharing back and forth and we've been looking for conferences together and so forth. And also what I've done is in staff, I've brought another staff member in to give another perspective, a teacher's point of view, and so that was the formative plan that I developed this year.

**Q:** So how do you feel that the Formative Evaluation Policy will affect your teaching and your administration in the future?

**A:** The way I look at it, it keeps me reflective and going back and reviewing what's happening in my world. Hopefully what happens is it keeps me stirred and enthusiastic and goal-setting and keeping my kids as my centre. It's just keeping that focus, that drive, and keeping me tuned to my world. Otherwise I get worried that I'm going to be complacent, and I don't want that to happen. And so the formative is just one way that I keep on top. I share every, I don't know if other administrators do it, but I share my formative with each of my staff, and that way it relaxes the feeling, and mine is usually done through illustrations and through written.

**Q:** Ok, is there anything else that you'd like to say about the Formative Evaluation Policy, pro or con?

**A:** With the formative, I don't call it evaluation, it's just the formative plan, and I want to say evaluation but it's not, it's the formative plan. I don't think so. I like it. I like the philosophy behind it. I know when we went up from the County of Warner to Horizon, talk about a night and day difference. It was just like someone took the load off your shoulders. It was just relaxing. I think administrators, it made them so they weren't just viewed as always the tyrants, that they were viewed as more of a working relationship. So that's it!

Female Teacher #5

**Q:** How many of years of teaching experience do you have?

**A:** 9 years.

**Q:** Have they all been in the County of Warner and Horizon?

**A:** No, I was in the County of Cardston for a couple of years, then Municipal District of Taber, then the County of Warner and then Horizon.

**Q:** What grade levels?

**A:** When I began I did Division 2 and Division 3 (Jr. High) and I taught at a Colony, and then back here it's been all elementary for the last 6 years.

**Q:** And in Jr. High what subject areas?

**A:** Social and Language, just for the first couple of years.

**Q:** If you could describe your past experiences with evaluation...

**A:** Can I tell you anything? The first time I was evaluated, the first two times, we were in the M.D. of Cardston, we had to be evaluated two times and both times the assistant superintendent did it, and it was very formal with the written reports. I had, when I went to the colony, I had two different principals, and the first time, I had a report done. It was extremely short. It was incredible. In fact, it was kind of upsetting because I'd never had a problem with evaluation, and in fact even you can learn a lot with it, but one of my evaluative reports stated "Keep up the good work with your whole language." That was my evaluation. So that didn't work out very well. And I mean it was positive, and he was orally really positive, but nothing, for all the stress that it was worth, I didn't get anything out of it on paper. Like, the next time I go for an interview, I can't say "Oh yeah, and there was a guy, he once said "Keep up the good work. You're doing great." The only written thing was just a one sentence thing. And then I was evaluated here; the Principal evaluated me about 3 or 4 years ago.

**Q:** Did you find the evaluations stressful then?

**A:** Yeah, I did. I'm confident in what I do and I think that most teachers are confident, but I think that the moment you have somebody at the back of the room scratching notes down I think it is stressful. It is stressful for me.

**Q:** Did you ever hear the term formative evaluation during those days?

**A:** No, in fact, I had my summative finished in about March; he made about 3 or 4 visits, and the reason, he told me that all the teachers who had been in the division for awhile had to be summatively evaluated, and then I was the one who was on the very last year, so I went through this hellish, nerve-wracking, and then in April these two ladies came and said "Oh we're going to do formative now, and I was mad, because I just got my 5 year stint done and figured "Whew" and then they said now nobody has to go through that. But they were really informative when they talked about the new way of evaluating. Once I saw more what it was like I was accepting of it, so I was annoyed that I had to go through all that stress before-hand.

**Q:** Referring to the Horizon Policy, has the policy been effectively communicated to you?

**A:** Yes, it has. Before we had really decided to do it, there were two ladies from Taber that came, and they gave us a really good inservice for about an hour and showed us some different formats for doing it, and they were really good.

**Q:** What about the actual policy has been helpful to you?

**A:** I think it has made me initiate some contacts. There are some areas that I'd really like to improve on. It's made me focus a little bit more and I think you're a little less afraid, you're just more inclined to go to those people, and say "help me out here", "This is what I'm doing." You want more feedback. Because a lot of times that little push at the beginning, you won't make that initial, we're always so busy that we won't make the initial attempt to talk to the right people.

**Q:** Can you think of anything that's been a hindrance as far as the Formative Evaluation Policy, or a problem?

**A:** No, I have ... It's been good.

**Q:** How do you feel that the Formative Evaluation Policy has affected the school, first of all in the area of staff morale?

**A:** I think people feel more trusted now. I think that even when we had the old summative way, they would come to you and they'd say "It's been five years since you've last been evaluated and you're going to be evaluated again." Well that assumes that we need to be in it, that we need to be supervised that way. I think that people feel better about our "bosses" saying to us: "We know you're good, but good people can get better. How do you think you can get better?" And I think it makes you feel better on the inside. It's not such a judgmental thing, it's a more accepting of what you think of yourself, you know, it's more of a self-evaluation. It allows you to get better.

**Q:** How about Teacher - Teacher relationships?

**A:** I think it's brought some teachers closer together, because there are teachers who work on things together. I think that you work in tandem a little bit better than before, because once again, often you wouldn't do things like that because, unless there was some reason to do it. And I think that if you get started with that it's a lot easier to keep on doing that in the future. Like let's say that if this year I'm working with a teacher that's doing grade 3 and 4, then just the practice of being together and watching each other work and talking about things and planning things together will make me more inclined to do that in the future I think.

**Q:** How about Teacher - Administrator relationships?

**A:** We've been really very lucky here. Even with the summative evaluations, I mean the Principals that we've had here have been so good about, they understand what kind of a process it is and how it makes people feel. I think once again, like I said before, with your bosses it's more of an idea that they trust you, and they know that you want to get better at things, and I think that here we've been so lucky because it's been the same, but maybe in many cases it's been better, because if people aren't so close ... when you have a small staff you're so close with the administrator anyway that there's not that feeling of "The boss is here" or on the way down here. Everyone's digging so hard that you're working together anyway. But I think it probably has made a difference in bigger schools. I'll bet it has. Here it seems like it's about the same.

**Q:** How about Teacher - Student relationships?

**A:** I don't know about that. I don't know that it could affect that. Like, I teach grade 1 and 2. I'm sure that if you were in an older class and they could, you know they would ask and you could, if you were teaching Jr. High or High School, and they could ask "Why are we doing this?" and you could share with them: "This is something I want to try because ..." or whatever, but with my kids, there hasn't been any difference. I think that the fact that I'm gaining from it will have an effect on their education of course as far as the relationship would go there's no real effect.

**Q:** How about general school climate?

**A:** Like I said here, we've always been positive here anyway, but I think it could do nothing but good, because everybody does start talking and people aren't afraid to say "This is an area I want to get better at, help me out, who has an idea?" and I think that it probably has. It never was bad here but I think that I could only make it better.

**Q:** Is there any further instructions or workshops you'd like to see with regard to the Formative Evaluation Policy?

**A:** No, I'm pretty comfortable with it. So far. Like it's been good.

**Q:** How do you think the policy might affect your teaching in the future? How do you see your teaching changing?

**A:** I think it can only get better, because it's given me a focus on things; it makes you sit down and think: "I'm awfully good at everything, right?!" and then "Well I have to pick something", so I think it can only make it better, because, I'll give you an example. Like this year, one of my big goals was to broaden my assessment tools. I wanted to really

expand on assessment. Well, I did focus in and I did, when things came through and they said “assessment” on them, I’d think “Oh, maybe this is something that will help me out” and this summer, in August I’m doing a week-long workshop in Calgary to an assessment consortium thing up there. And I think that just because assessment is a big focus, I mean there’s other things I’m interested in too, but I still think that I am focussed on that, and it’s going to turn into a two year thing instead of a one-year thing because it’s a big, big area. And I can just see growth and I saw this year myself get better and it’ll get better even more and it’ll get better. Teachers are bound to get better from it because it’s not a threatening thing and it forces them to look at what they’re doing.

**Q:** Anything else regarding the Formative Evaluation Policy?

**A:** No, I like it. Like I said, I didn’t welcome it a whole bunch at first because I just finished my summative but I think it’s good. I really think it’s good. I think it’s going to be good for the staff, and for the kids, and it’s going to be good for the relationships with you peers and your bosses and things like this.

**Q:** Thank-you very much!