

**Special Strategies Observation System-Revised:  
A Useful Tool for Educational Research and Evaluation**

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## INTRODUCTION

Systematic observation of classroom behaviors has a long and interesting history as an important data collection method in educational research and, to a lesser extent, in educational evaluation. Rosenshine (1970) discusses four major uses of observational systems for the evaluation of classroom instruction. They are: “(a) assessing the variability of classroom behavior either within or between instructional programs, (b) assessing the agreement between classroom behaviors and certain instructional criteria, (c) describing what occurred in the implementation of the instructional materials, and (d) determining relationships between classroom behavior and instructional outcomes” (p. 288).

More recently, Anderson and Burns (1989, as cited in Padron, Waxman, & Huang, 1999) identified three major strengths of classroom observations: “(a) permits researchers to study the processes of education in naturalistic settings, (b) provides more detailed and precise evidence than other data sources, and (c) can be used to stimulate changes and verify that change occurred” (pp. 68-69). Padron, Waxman, and Huang added yet another strength of classroom observation, that of investigating inequities in the delivery and receipt of instruction by different groups of students. They feel that classroom observations can answer questions about whether or not some students are treated differently in classrooms and if that difference helps to explain why some students learn more than others.

## BRIEF HISTORY OF SYSTEMATIC OBSERVATION OF CLASSROOMS

The purpose of this section is to provide a brief history of systematic observation of classrooms. We begin by identifying the most important reviews of literature of this field and we follow with an explication of the most significant—in our opinion—milestones in systematic observation of classrooms.

### Review of Critical Literature

In a chapter titled “Social Interaction in the Classroom” in the 1963 edition of the *Handbook of Research on Teaching* (Gage, 1963), Withall and Lewis provided the first thorough and scholarly history of the modern era of systematic observation of classrooms. Historically, Withall and Lewis trace the development of classroom observation to three main sources: (a) within education, such as teacher characteristics, child development, and impersonal conditions of learning; (b) the mental hygiene movement, which raised educators’ awareness of individual students’ well-being associated with learning; and (c) studies of group life by sociologists and social psychologists, which began to explain how group members in different roles influence each other. As examples of these influences, Withall and Lewis cite the work of Anderson and his collaborators (Anderson & Brewer, 1945), who developed teacher behavior categories (grouped into “dominative” and “integrative”) and child behavior categories. Next, the authors describe the field in the 1940s by pointing to the period as the time of studying what they call the “social-emotional climate in the classroom” (Withall & Lewis, 1963, p. 696). The two major influences for the interest on social-emotional climate were (1) the Iowa studies of boys’ clubs by Lewin, Lippitt, and White (1939), in which they observed and labelled either democratic, autocratic, or laissez-faire leadership styles; and (2) the Chicago studies. These latter studies emanated at the University of Chicago under the leadership of Thelen (1951). Withall and Lewis describe how these Chicago researchers began to develop a theory of instruction based on constructs in Lewin’s field theory, child development researchers, and Rogers’ client-centered psychotherapy. The most important outcome of the Chicago studies was Withall’s dissertation, in which he debuted the “Climate Index.” Basically, this Climate Index is a tool for categorizing and quantifying the verbal behaviors of the teacher in any classroom. We consider Withall’s instrument to be a landmark in the field and, thus, will be described in more detail in the next section. Withall and Lewis conclude their chapter by chronicling the research on classroom interaction research in the 1950s.

Simon and Boyer (1967) provided a valuable service to the field of classroom observation by collecting, categorizing, and presenting many of the most popular classroom observation systems in a series of related volumes. The volumes were appropriately titled *Mirrors for Behavior: An Anthology of Observation Systems* (Simon & Boyer, 1967). The main contribution of these authors, besides compiling the various actual instruments in one place, was that of assigning them to either the “affective or cognitive domain”, or both. Simon and Boyer acknowledge that all the instrument developers may not agree with the categorizations; however, their categories were an effective starting point at that time. They state that the affective observation systems deal with the emotional climate of the classroom by coding the teacher’s

behaviors to students. On the other hand, the cognitive observation systems deal with the thought processes as expressed in the classroom. Here, teachers' relaying of information, asking questions of students, and student responses are coded in the system. They state that most cognitive systems require both complex coding schemes and, also, complex data collection schemes, such as audio taping. The Simon and Boyer volumes include convenient tables that display the data collection methods reported for the 26 observation systems they present and the uses reported by the instruments' authors. Then, for each observation instrument, they provide a summary checklist of descriptive features, such as system dimension, type of communication required, subject of observation, data collection method reported, audio or video tape required, personnel needed to code, coding units, and uses reported by author. Later, the same authors published 66 more observation systems in additional volumes in the *Mirrors for Behavior* series (1970).

Rosenshine (1970) wrote a chapter in the *Review of Educational Research* that reviewed "available instruments for the observation of classroom instruction and to suggest modifications for local evaluation of instruction" (p. 279). Rosenshine grouped classroom instruction observation instruments into two major divisions: category systems and rating systems. He states that category systems are low-inference measures because they focus on specific, observable, objective behaviors and, also, because the events "are recorded as frequency counts" (p. 281). On the other hand, he classified rating systems as high-inference because they lack such specificity and because the observer must infer the constructs to be rated, such as enthusiasm, clarity of presentation, or supportive of students. Further, rating systems require the observer to infer the frequency of such behaviors to arrive at ratings such as consistently, sometimes, or always. Rosenshine notes that "category systems have become very popular in descriptive educational research and in teacher training because they offer greater low-inference specificity and because an 'objective' count of a teacher's encouraging statements to students appears easier for a teacher to accept than a 'subjective' rating of his warmth" (1970, p. 281). He also notes that rating systems offer greater flexibility than category systems because of their high-inference items and, also, they can be less expensive to implement. Although some category systems were developed specifically for certain content areas, e.g., reading and mathematics, the generality of them was illustrated by Rosenshine in his chapter and he concludes that almost all category observing systems are general systems.

In the *Second Handbook of Research on Teaching* (Travers, 1973), Rosenshine and Furst authored chapter 5, titled "The Use of Direct Observation to Study Teaching" (pp. 122-183). This very long chapter includes a section on the instruments for the observation of teaching. The authors make some effort from six references to identify how many observation instruments existed at the time of their writing and concluded that "Even 120 systems are clearly an underestimation" (p. 132). The chief contribution of Rosenshine and Furst's chapter, for this review, is their identification of three elements that distinguish the various observational instruments at that time. These three distinguishing elements are the recording procedure, the scope and specificity of the items, and the format used to code individual events. Given their importance in this review of the history of systematic observation of instruction, each will be discussed in turn, below.

With respect to differences in recording procedures, Rosenshine and Furst (1973) state that the scale used to record the frequency of the target behavior or event is a crucial distinguishing feature of observation instruments. They posit that:

When an event is recorded *each time it occurs*, the instrument is labeled a *category system*; when an event is recorded *only once if it occurs within a specified time period*, regardless of how often it occurs during that period, the recording instrument is called a *sign system* (p. 132).

On the other hand, rating instruments differ from both category and sign systems in that observers are expected to make their ratings only once, usually at the end of the observation period. Further, the frequency of behaviors or events is estimated on a scale of typically five to seven points, which represent low to high frequency. This difference between observational rating *instruments* from observational *systems* is crucial to understanding the field.

Regarding difference in the items in observational instruments, Rosenshine and Furst (1973) offer three distinctions—high inference items, moderate-inference items, and low-inference items. They relate that most items on early rating forms are very broad, requiring much—or high—inference on the part of the observer. “Ratings on teacher warmth, overall effectiveness, clarity, or enthusiasm require high inference” (p. 133). In contrast, items in most category and sign observations systems are more specific, less prone to interpretation, and, thus, require less inference. In between the high-inference items and the low-inference items are the moderate-inference items. This is a natural outcome of the development and publishing of more observational systems, they state.

Last, differences in recording formats for observations became more widespread around 1968, although the idea was not new (Rosenshine & Furst, 1973). Prior to 1968, the most common recording format was simple coding—one behavior equals one code. Multiple coding means that one behavior or event is coded on a number of dimensions. The Flanders Interaction Analysis system (Flanders, 1970) is credited with popularizing multiple coding. Rosenshine and Furst (1973) provide the example of an instrument developed by Moore (1968) that illustrated multiple coding. In the Moore system, each event is coded four different ways: (a) the dominant activity (e.g., lecture, supervised study); (b) the speaker and communication (e.g., student asks question, teacher answers question); (c) the communication content (e.g., a fact, criticism, definition); and (d) the major instructional objective targeted.

Rosenshine and Furst (1973) next spend some time describing functional differences between the various observational system designs using subjects’ cognitive gain as the validation criteria. They discuss category versus sign systems and category versus rating systems. With respect to the latter comparisons using student outcome data, they conclude that: “The results on ‘clarity’ are particularly robust because the investigators used different rating instruments” (p. 136). Further, Rosenshine and Furst conclude: “The optimal strategy at this point would be to use a variety of instruments in every study” (pp. 136-137).

Writing in the fifth edition of the *Encyclopedia of Educational Research* (Mitzel, 1982) Medley (1982) provided a thorough article titled “Systematic Observation” (pp. 1841-1851).

Even though Medley modestly labels his article as a “brief overview” (p. 1842), nonetheless it is an important treatise on the topic. The importance of Medley’s article rests in the clarity and specificity of his narrative. For example, early in the article, he writes:

The term “systematic observation” is used here to refer to observations of classroom behavior made by a trained observer who records the behaviors according to an observation system. An “observation system,” in turn, is a scheme that specifies both the events that the observer is to record and the procedure to be used in recording them (p. 1842).

He then proceeds to define clearly the terms “observer,” “rater,” “recorder,” and “coder.”

Medley (1982) next names and describes three kinds of observation systems in use at that time: sign systems, category systems, and multiple-coding systems. “Observations made with any one of these observation systems differ both in method and purpose from observations of classroom behavior made by ecological observers, ethnographers, or raters,” Medley states (p. 1842). He defines sign systems in much the same manner as Rosenshine and Furst, above, and agree that “The recorder makes no attempt to record how frequently any one sign is observed during a period, only whether it was seen at all” (p. 1842). This is the reason why it is called a sign system. He then proceeds to describe how sign systems differ from checklists, namely: (a) each sign refers to a single occurrence rather than a way of behaving, and (b) a sign system is designed to locate behaviors in time designations within a typical class period whereas checklists generally are completed at the end of the class period. Several advantages of sign systems include: (a) easier to train recorders; (b) many signs can be in such a system; and (c) it is easy to add, revise, or remove signs. As an example of a sign system at that time, Medley describes the Classroom Observation Keys for Effectiveness Research or COKER system developed and implemented by Coker and Coker (1979).

Category systems are explained next in the Medley article (1982). As the name implies, category systems consist of a “mutually exclusive, all-inclusive set of categories for classifying classroom behaviors” (p. 1844). Here the observer must record every event within a prespecified domain that occurs during the prespecified time period. Medley opines that a category system is more of a system than a sign system and that “. . . it is more difficult to change a category than a sign” (p. 1844). Defining the various categories is difficult as is defining what unit constitutes a recordable event. As an example of this, Medley states several category systems require the coder to judge when a speaker has completed a thought or point while others, like Flanders (1970), define an event by the unit of time. Specifically, in the Flanders system, whatever happens in a three-second interval is an event and is coded immediately. As an example of a category system used to any extent in research, the OScaR2a observation system (Medley & Mitzel, 1958) was described. The OScaR2a system was based on a simplified version of the verbal categories originally developed by Withall (1949). Here, Withall’s seven verbal categories of instructor talk were collapsed to five categories. Medley concludes that one of the marks of a well-designed category system is that there is no “neutral” or “miscellaneous” category required to make the system all-inclusive. This is the main reason why it is much more difficult to construct a good category system than a sign system, he feels.

Multiple-coding systems are ones in which a single behavior or event is coded in two or more category systems, according to Medley (1982). For example, interaction among two individuals may be coded by the roles of the individuals, the content of the interaction, the ethnicity of the individuals, or other categories. The number of categories that the observer must learn increases the complexity of the training of reliable coders of multiple-code systems, as well as increasing the analysis time. Sometimes multiple-code systems are employed in a time sampling process within classrooms as opposed to full periods of observation. As an example of this type of coding system, Medley describes the Stanford Research Institute Classroom Observation System (Stallings, 1977). One part of the Stallings observation system includes five minutes of multiple-code interactions. Here, each individual interactive statement is coded immediately in four different categories: (1) Who?, (2) To whom?, (3) What?, and (4) How?. Thus, every statement made inside the five-minute window is coded as to who said it, to whom it was said, what the content was, and how was it stated (e.g., happy, unhappy, etc.) Medley calculates that because of the number of possible codes per each category (10, 10, 12, and 13, respectively), “. . . more than 15,000 distinct kinds of events can be distinguished in records made with the instrument” (p. 1844).

Systematic observation systems were adopted by educational researchers, often called “process-product” researchers, as a relatively affordable means for obtaining objective, accurate, and quantifiable records of the specific behaviors of teachers and students in classrooms (Medley, 1982). Such records can be analyzed, scored, and compared so changes in teacher behaviors can be detected. “Despite the current reexamination of strategies for such research,” Medley says, “systematic observations are still important tools for research in teacher effectiveness” (p. 1845).

Medley acknowledges that systematic observations of classroom behaviors, as he defined them above, certainly are not the only kind of observation of classrooms that might be called systematic. He specifically names and describes three other possible types of observations: (1) ecological observations, (2) ethnographic observations, and (3) ratings of teacher characteristics. He states, however, that these latter kinds of observations differ not only in methodology, but also in purpose. Ecological observations differ from the above systematic observations in that the categories are defined after the observation is over, not before. Ethnographic observations, on the other hand, rely on the uniqueness within each observation completed. Medley feels that both ecological and ethnographic observations are well suited to discovery of new knowledge, more so than confirming prior knowledge in new settings. Observers using teacher rating scales are not expected to produce a record of behavior as much as a record of judgments of the degree to which a set of characteristics were evident during a visit.

The next major section of Medley’s article (1982) deals with using systematic observation. In this section, he discusses collecting data, observation schedules, controlling quality, “coder drift,” quantifying the observational record (producing the scoring key), static scoring, generating composite keys, and dynamic scoring. He concludes that “after decades in which research on teacher effectiveness was completely unproductive, the application of systematic observation has suddenly begun to produce dependable and useful results” (p. 1851).

Finally, Stallings and Mohlman authored a pithy but helpful article titled “Issues in Qualitative Evaluation Research: Observation Techniques” (1990, pp. 639-644). One unique contribution of this article is the delineation of common elements across all “observational techniques” as they label them. These common elements include: (a) purpose, (b) a set of operational definitions, (c) a means to train observers, (d) a focus on observation, (e) a setting, (f) a unit of time, (g) observation schedule (timing of data collection, not the observation form itself, as used by Medley, above), (h) a method to record data, and (i) a method to process and analyze data. Another valuable contribution of these authors is their all-inclusive list of different types of observational techniques. They name and explain checklists, rating scales, interactive coding systems, and narrative descriptions. Note that their list does not include category and sign systems but does include what they label “interactive coding systems” and, also, “narrative description.” These latter two terms were unique to these chroniclers of observations systems at the time of their article.

Stallings and Mohlman (1990) provide examples, advantages, and disadvantages for each type of observational technique they named. Their choice of examples is very interesting. For instance, the example of a checklist they presented was one section of their own Stanford Research Institute Classroom Observation System (Stallings, 1997) called the “Snapshot.” When the time comes to display an example of interactive coding system, they chose to use the Flanders Interaction Analysis System (1970) and not their own “Five-Minute Interaction” section of their instrument, which Medley (1982) chose to use to illustrate his designation of a multiple-code system (see above). “An interactive coding system allows an observer to record everything a teacher or student says or does during a given time span” (p. 642). They offer that an advantage of the interactive coding system is that they are very objective, plus the categories are understandable and rather acceptable to educational practitioners. Disadvantages are that some of the quality of the interaction is lost in the codes, that the content of the lesson is obscured in coding, and that the training required can be extensive—five to seven days are required for the Stallings/Stanford observation system.

The main contribution of the Stallings and Mohlman article (1990) was the inclusion of narrative description as an observation technique. What this article did was to update the field by including work that some researchers had completed in the decade of the 1980s. Recall, Medley’s article was published in 1982 and, although he acknowledged ecological and ethnographic observation techniques, he did not have the advantage of viewing the research that employed these techniques during the 1980s, as did Stallings and Mohlman. They state that this technique consists of writing everything observed that is central to the focus and purpose to the observation in narrative form. In most cases, the observer is guided to look for specific behaviors or events related to the focus of the visit. For example, Evertson and Emmer (1980) conducted studies on the beginning of the school year classroom management at several grade levels. Here, the observers were instructed to write down teacher statements about classroom rules, expectations for quantity of student work, and expectations for quality of student work. The resulting narrative descriptions had a clear focus, which was guided by the researchers’ interests and hypotheses. One advantage of narrative descriptions is that the context of the observation can be described in a rich and “thick” manner. The short training period needed to train observers to prepare satisfactory narrative descriptions is another advantage. The authors point to Evertson, Emmer, and Clements (1980) as a source on the process of building a good research team for

narrative description observations. As one would expect, a major disadvantage of this technique lies in the processing and analyzing of the narrative data. Much work in reading, coding, and summarizing must be completed before results and conclusions can be drawn from narrative descriptions.

### **Milestones in Systematic Observation of Classrooms**

The beginnings of systematic observation of classrooms have been traced to 1914. Engelhart (1972) cites a study by Horn (1914) in which observers noted students' participation in recitations by marking a seating chart with small circles for each request to recite and small squares for each response to the request. In 1928, Puckett used a series of slightly more complex symbols on a seating chart to record such student behaviors as "pupil raised hand," "was called on by the teacher," and "made a fair response" (Engelhardt, 1972, p. 123). The earliest research study to identify the teaching behavior patterns of effective and ineffective teachers was reported by Barr (1929). This observational data included counts of motivating behaviors (e.g., nods approval) and types of questions asked by teachers (e.g., recall of facts, real judgments). In 1934 (as cited in Engelhardt, 1972), Wrightstone reported on a study in which specific numeric/alpha symbols (e.g., 5a, 5b, 5c, etc.) were reported on a class roster after pupils' names to indicate different teacher behaviors. Examples included "proposes a question," "allows a pupil to make a voluntary contribution," and "discourages or prohibits a pupil contribution" (p. 124).

Starting in 1939 and in the mid-1940s, Anderson and his colleagues (Anderson & Brewer, 1945; Anderson & Brewer, 1946; and Anderson, Brewer & Reed, 1946) reported on an important series of research studies. The main interest of these researchers was that the chief influence in the classroom was the teacher behaviors on their students. Anderson developed 26 categories of teacher behaviors in classrooms. These were grouped into two main categories relative to their influence on student behaviors. The two categories were named "dominative" and "integrative." Both nonverbal and verbal behaviors were observed and recorded in the system, as well as individual or group contacts of teachers with students.

Illustrative behaviors in the Anderson scheme may prove useful for understanding the two major categories. Representative examples of their "dominative" teacher behaviors include: "(1) telling a child to move to another part of the room; (2) using warnings, threats, and reminders; (3) punishing by sending out of the room; (4) making gratuitous judgment, and (5) calling to attention" (Anderson et al., as cited in Withall, 1963). Representative examples of integrative behaviors include: "(1) questioning to obtain information regarding possible interest of child; (2) helping child to define, refine, and solve a problem; (3) approving, commending, and accepting the spontaneous self-initiated behavior of the child; and (4) asking questions regarding the child's expressed interests" (Anderson et al., as cited in Withall, 1963). As the reader might surmise, Anderson and his co-workers conducted their studies in kindergarten and primary grades.

Anderson and his colleagues found that teachers' behaviors and personality influenced the students in their classrooms. Teachers who were dominative in their classrooms tended to yield aggressive and antagonistic behaviors in their students as expressed toward both the teacher and their classmates. "On the other hand, teachers who used socially integrative behaviors

appeared to facilitate friendly, cooperative, and self-directive behaviors in their children” (Withall, 1963, p. 693). Their research showed that teachers’ behaviors could be observed on the basis of the dominative and integrative contacts with students and students were influenced accordingly.

In 1949, Withall published a truly landmark article in the history of systematic observation of classrooms. Titled “The Development of a Technique for the Measurement of Social-Emotional Climate in Classrooms,” this article was an outgrowth of his 1948 doctoral dissertation of nearly the same name at the University of Chicago (John Withall, personal communication, summer of 1972). Withall was among a group of researchers at the University of Chicago who, under the leadership of Thelen, began to integrate several lines of research into their work. These lines of research included (a) Lewin’s field theory, (b) contemporary research in child development, (c) Rogers’ client-centered therapy, and (d) group dynamics (Withall, 1963).

Withall felt that the social-emotional climate in the classroom was an outcome “determined primarily by the teacher’s verbal behavior taken as representative of her total behavior” (Withall, 1963, p. 697). Withall developed an instrument, initially called the “Climate Index” but later called “The Social-Emotional Climate Index,” for quantifying and categorizing the verbal behaviors of the teacher of any class. His categorization system was not subject or grade-level specific; it was general. The development of this system was accomplished through an extensive analysis of audio recordings of daily classroom sessions in a sample of junior high school classes. Teachers’ verbal statements were analyzed from the audio tapes within the context of their impact on students’ responses, questions, and other verbal behaviors. Withall purposefully listened for and coded the emotional tone and the inferred intent of the teachers’ verbal statements. Initially, he identified 25 different kinds of teacher statements, but upon further analysis, these were reduced to 13 kinds of statements (Withall, 1963). Finally, these 13 types of teacher statements were collapsed into 7 categories.

In Withall’s Social-Emotional Climate Index, the seven categories for all teacher statements include “(1) commended or approves the learner, (2) conveyed understanding or acceptance of the learner, (3) gave information to or asked questions of fact, (4) comprised ‘chit chat’ and routine administrative items, (5) limited or controlled the learner’s behavior, (6) deprecated or disapproved, and (7) defended or supported the teacher” (Withall, 1963, p. 698). Regarding the social-emotional climate aspect of the seven categories, the first three categories are seen as learner-supportive, the last three categories are teacher-supportive, and the fourth category in the middle is neutral in terms of climate or tone. Users of the Social-Emotional Climate Index are instructed to listen carefully to determine the dominant intent of the teacher’s voice. If the intent was to sustain the learner more than the teacher, the statement was categorized into one of the first three categories. Conversely, if the dominant intent of the teacher’s statement was to sustain the teacher more than the learner, then it was categorized into the last three categories.

The importance of Withall’s Social-Emotional Climate Index to the field of systemic observation of classrooms cannot be overemphasized, we feel. His publication was a seminal event in the field, spawning numerous other observation systems or parts of systems. For

example, Medley and Mitzel (1958) used Withall's teacher verbal behaviors in their OScAR2a observation system, although they collapsed the seven categories to five. Later, Flanders (1970) developed his Interaction Analysis system, which was widely used in research in the 1960s. Flanders was a graduate student at the University of Chicago, one year behind Withall (John Withall, personal communication, summer 1972), and completed his dissertation in 1949. Close inspection of Flanders' ten categories reveals that he added three new categories to Withall's seven. Two of these new categories were for student verbalizations and the third was for silence or confusion. The unique aspect of his Interaction Analysis system (1970) was that he developed a matrix to record the interaction sequences. It was this sequencing of classroom interactions that made Flanders' system so popular in educational research.

Stallings developed a landmark observation system in the late 1960s and published it in her aptly titled book: *Learning to Look: A Handbook on Classroom Observation and Teacher Models* (1977). The origins of the Stallings observation system, technically labeled the "Stanford Research Institute Classroom Observation System," were in the federal government's need to evaluate the implementation of several educational programs participating in the Follow Through Planned Variation Project (Stallings, 1978). Classroom observations were the only way to assess if the different Follow Through projects were being implemented as planned. The Stanford Research Institute team studied many observation systems developed by others, but found none "broad enough or flexible enough to accommodate the wide range of projects in the Follow Through Project" (Stallings, 1977, p. 25).

The Stallings observation system consists of three main instruments: (1) the Physical Environment Information, (2) the Classroom Snapshot, and (3) the Five- Minute Interaction. In later publications, Stallings (1983) de-emphasized the Physical Environment Information instrument. As expected, each of these instruments in the Stallings system are preceded by the completion of a cover page that secures identifying information such as teacher number, grade, observer number, date, identification number, number of students enrolled, and total class duration in half-hour segments (Stallings, 1977).

The Physical Environment Information page is completed once during each visit and includes such environmental features/conditions of the classroom as lighting, heating and ventilating, any displays, noise level, condition of building, description of classroom space, and any play or playground equipment (Stallings, 1977).

The Classroom Snapshot, or the "snapshot" as it is known, records all the participants in the classroom and what they are doing (Stallings, 1977). Thus, it is akin to a Polaroid picture, or photographic snapshot, taken at a point in time and recorded forever. The snapshot records every person in the classroom, what activities they are engaged in, and it also shows with whom they are engaged. To complete the snapshot, the observer makes a visual sweep of the classroom, views everybody and what they are doing, and with whom they are doing it. The snapshot is a grid that includes all the possible adults (teacher, teacher aide, and visitor), all possible combinations of students (one, two, small groups, and large groups), and 15 categories of activities (such as arts/crafts, tables/games/etc., math, reading, social studies, science, dramatic play, practical skills, social interaction, discipline, transitional activities, classroom management, etc.). There are a total of 22 rows of such activities in the snapshot, and the observer bubbles in

what the adults are doing and with what arrangement of students. The snapshot is completed five times a class period, just prior to completing the interaction codes (below). Stallings reports that the snapshot form looks formidable, but that it is rather efficient and easy to use, with teachers and administrators learning to use it satisfactorily in just two half-day training sessions (1983).

The Five-Minute Interaction instrument in the Stallings observation system (1977) is the most innovative part of her system. As the name implies, the Five-Minute Interaction instrument is completed in sets of five-minute time blocks, just after the snapshot is finished. Here, every interaction among the adults and students in a classroom is coded and recorded on the bubble sheet. The purpose is to capture all the interactions so the data can be analyzed to reveal the teaching style and the interaction processes operating in the classrooms. The unique aspect of the Stallings Five-Minute Interaction instrument is that each interaction (statement) is coded instantly into four coding systems, each with individual categories. The four interaction systems are: Who?, To whom?, What?, and How?. In both the Who? and To whom? systems, there are ten different codes available: teacher, aide, volunteer, child, different child, two children, small group, large group, animal, and machine (Stallings, 1977). In the What? system, the content of the interaction is coded into 14 different categories, such as command, request, response, instruction, comments, acknowledge, praise, corrective feedback, no response, waiting, etc.. In the How? system, the tone of the interaction is described in 12 different categories such as happy, unhappy, negative, touch, question, punish, object, worth, etc. Medley (1982) observed that, since the Five-Minute Interaction instrument provide ten categories each for Who? and To whom?, 14 for the What?, and 13 for the How?, “more than 15,000 distinct kinds of events can be distinguished in records made with this instrument” (p. 1844).

## **Summary Of History**

It would seem to be very presumptuous of us to try to summarize the history of the systemic observation of classrooms in a few paragraphs when others before us have done so in scholarly chapters and articles (see above). However, necessity is the mother of invention and we find it necessary to attempt a brief summary of the field, mainly as a precursor to describing the instrument that is the subject of this paper.

The beginnings of systematic observation of classrooms can be traced to 1914 with symbols affixed to students' names on a seating chart to represent participation in recitation activities. Refinements and elaborations on such symbols to denote student participation continued in the 1920s and 1930s. In the very late 1930s and early 1940s, the work of Anderson and his colleagues changed the focus of classroom behaviors to that of the teacher. Then, in 1949, Withall published the first truly landmark study of classroom observation where he developed a system to assess the “social-emotional climate” of the classroom through the analysis of teacher verbal behaviors into seven mutually-exclusive categories. Withall's study spawned a proliferation of derivatives, most notably of which was Flanders' Interaction Analysis system. Basically, Flanders added three new categories to Withall's seven and developed a unique grid method to display the interactions within a classroom based on those ten categories. Systematic observation of classrooms research flourished in the 1950s and 1960s. Literally hundreds of observation systems were developed by researchers and these were employed to

investigate various aspects of classroom processes connected to student outcomes (products). These were known as process-product research studies.

In 1969 and in the 1970s, Stallings developed, published, and employed a truly influential classroom observation system. Developed initially to investigate early childhood programs nationwide, Stallings later refined and modified the observation system to fit both elementary and secondary classrooms. The main contribution of her system was that it was a system. That is, it included a checklist of physical items in the classroom, a “Snapshot” sign system to be completed every five minutes, and a unique multiple-coding scheme for every interaction. In the Stallings “Five-Minute Interaction,” every statement is coded instantly into four mutually-exclusive categories—each with a minimum of ten distinct behaviors. As a result, over 15,000 combinations of events can be recorded by the Stallings system (Medley, 1982).

Process-product research employing systematic observations of classroom data collection methods abounded in the 1960s and 1970s. In a seminal synthesis of this line of research, Medley (1977) identified more than 600 significant relationships between classroom behaviors and students’ learning gains. However, starting in the mid 1980s, there was a noticeable decline in process-product research and in the use of systematic observation of classrooms in educational research. The view held here is that this precipitous decline in this type of research was due to three main reasons. First, the identified *correlates* of classroom behaviors to student learning gains was used by many as indicators of *required* teacher behaviors to be employed in all classrooms. For example, there were leaders in states that assembled teacher rating scales with selected indicator behaviors from process-product research and these rating devices became evaluation instruments for observing and evaluating classroom teachers statewide. Second, the rise of qualitative research and its attendant methodologies (e.g., Lincoln & Guba, 1985; Guba & Lincoln, 1989) made quantitative research methods emphasized less. Third, the popularity of constructivism as a philosophical approach to discover knowledge rendered systematic observation of classrooms outside the mainstream of popular educational research methods. An excellent example of this is the chapter by Evertson and Green (1986) in the third edition of the *Handbook of Research on Teaching* titled: “Observation as Inquiry and Method.”

Finally, just as the systematic observation of classrooms is said to yield the “language of the classroom,” we feel compelled to provide a shorthand “language of the observation systems.” Rosenshine and Furst (1973) provided the most useful delineation of the elements that distinguish classroom observation systems. Their elements and the narrative copy about them hold to this date, especially when the explicit definition of “systematic observation” provided by Medley (1982) is employed. Taking these writings together, Sullivan and Meehan (1983) developed and presented a graphic depicting the Rosenshine and Furst (1973) elements. It appears here as Figure 1. Basically, the three distinguishing elements of classroom observation systems and their subelements are (1) recording procedures (category or sign systems); (2) item differences (low-, moderate-, or high-inference items); and (3) format differences (simple or multiple coding).

# Graphic Depicting Elements Which Distinguish Classroom Observation Systems\*

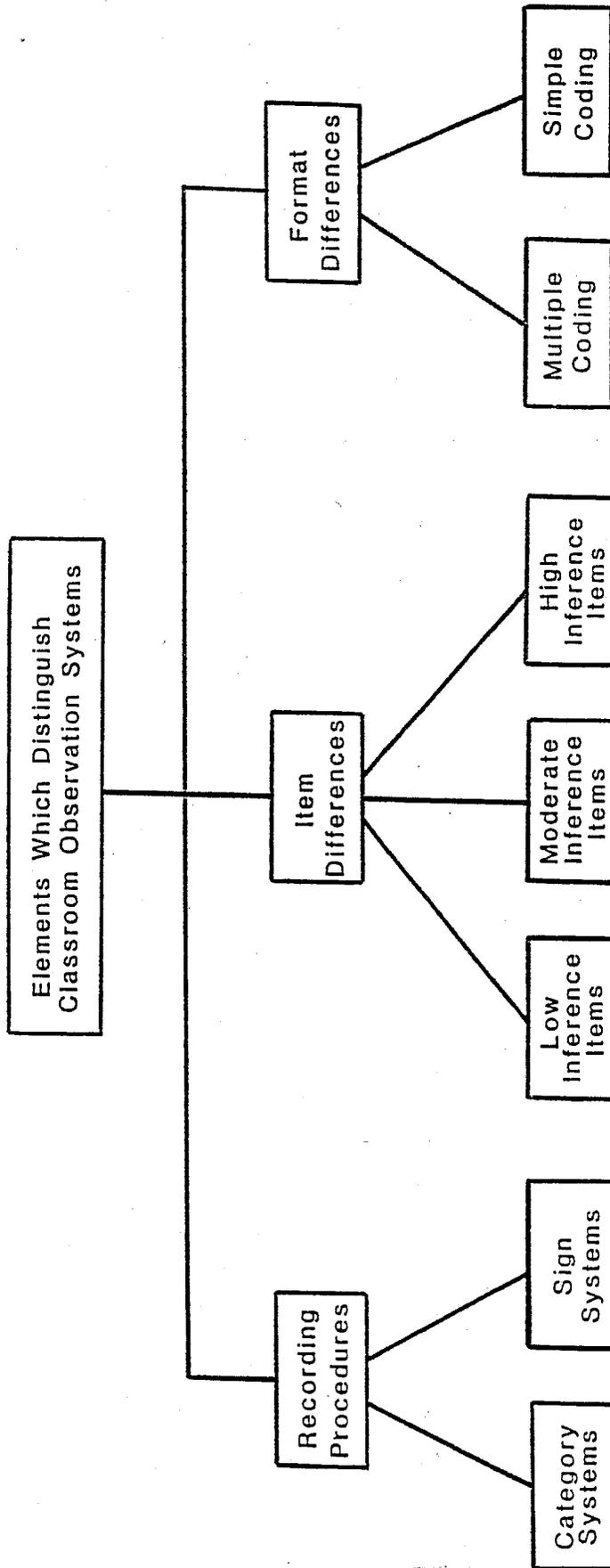


FIGURE 1

\*From the narrative supplied by Rosenshine and Furst (1973).

## DEVELOPMENT AND USE OF SPECIAL STRATEGIES OBSERVATION SYSTEM

This section discusses the development and use of the Special Strategies Observation System (SSOS). The SSOS is an important classroom observation system because (a) it bridges the period of relative decline in research on the teaching/learning process via systematic observation to the present, and (b) it did so by overtly combining qualitative data collection techniques with the more traditional quantitative techniques.

### First Publication About the SSOS

The first *publication* about the SSOS in the literature appeared in 1991. We emphasize publication about the SSOS because that reference mentions its use in a large-scale study in the United States, started in the early 1990s, but the first report of that study did not appear in the literature until 1994. The 1991 publication on the SSOS was a paper presented by Schaffer, Nesselrodt, and Stringfield at the International School Effectiveness Research Workshop held at the National Kaohsiung Normal University in Kaohsiung, Taiwan. The title of this paper was “The Groundings of an Observation Instrument: The Teacher-Behavior-Student Research Base of the Special Strategies Observation System (1991).” The purpose of this paper was to suggest the use of the SSOS in the International School Effectiveness Research Programme (ISERP).

Before they discuss the SSOS itself, Schaffer, Nesselrodt, and Stringfield (1991) review major findings on teacher behaviors and student learning from current research. Although they acknowledge that classroom observations began in the 1920s, they purposefully chose to begin their review in the 1970s with the work of Rosenshine and Furst (1973). They say that “these studies of the classroom’s processes and students’ learning or as it is called process-product research became a major method of examining classrooms during the 1970s and 1980s” (p. 3). They continue, “over the years from 1970 to 1990, the field gained a great deal of knowledge of teacher effects on student learning. The description—correlation—experimentation cycle noted earlier has been borne out by much of the research” (p. 4). However, these authors note that this line of educational research encountered criticism on a number of “fronts.” They identify and describe criticisms to the descriptive—correlation—experimentation research as being related to educational theory, research methodology, and practical applications of results.

Rather than debate the relative merits of the criticisms, Schaffer, Nesselrodt, and Stringfield (1991) “propose to arrive at a next step in the observation of classrooms based on a merging of the strategies” (p. 7-8). Here they refer to combining the quantitative and qualitative methodologies that would include both the frequencies of teaching behaviors with the thick descriptions of the contexts within classrooms. Thus, their SSOS includes elements of both process-product research traditions and elements of emerging qualitative research methods. The SSOS “is so named because of its ability to identify special strategies suggested by program developers or teachers as essential to the program or classroom involved in the process” (p. 9). The authors consider the SSOS a system because of the number of components that are combined to investigate a variety of teachers’ behaviors within a wide variety of classroom contexts.

The 1991 version of the SSOS (Schaffer, Nesselrodt, and Stringfield, 1991) contained nine major sections. They were (1) demographic page, (2) activity codes, (3) time points, (4) engaged rates, (5) groups and activities, (6) descriptive notes, (7) QAIT assessment, (8) classroom environment and resources, and (9) program specific inventory. The first major section of demographics requires the observer to note and write in typical background information such as date, school number, teacher number, subject taught, the observer's name, and the number of adults in the room. Descriptions of the remaining eight sections follow. All the SSOS pages in the 1991 version are in the horizontal (landscape) format.

The next four sections of the SSOS (Schaffer, Nesselrodt, and Stringfield, 1991) are low-inference, sign systems. Activity codes, the first of this quartet, include 15 specific teaching or student activities. These codes were drawn from the prior work of Evertson, Emmer, Clements, and Sanford (1980) and Emmer, Sanford, Clements, and Martin (1981). Example activity codes in the SSOS included "pairs or groups seatwork" and "non-academic activity" (1991, p. 11). Whenever an activity from the list is started, the number for that code is written in the column at the far left side of the SSOS form. Time points, as the name indicates, are the specific times each activity code is started. These time points are written in the column immediately to the right of the activity code. These time points serve not only as a running record of the changes in activities but also as a measure of the duration of activities. The "engaged rate" section appears at the far right side of the SSOS observation page. Here, the exact numbers of students "on task," "off-task," and "waiting" are noted on the form. This "engaged rate" information is recorded every eight minutes after the initial recording at the two-minute mark. Next is the groups and activities section. This low-inference part of the SSOS calls for recording the various grouping patterns in the classroom. Here, the number of students working with the teacher, aide, or other students are recorded. Also, the type of task that is to be completed, in four general categories, is noted for each group observed.

To here, both the left and right hand sides of the SSOS page have been described. What about the center of the SSOS page? The center of the page includes a series of lines, equally spaced from top to bottom on the page. These lines are for writing descriptive notes. These descriptive notes are high-inference observations written by the classroom recorder. These descriptive notes are a form of qualitative data collection and form a narrative record of the ongoing interactions in the classroom. This section is the heart of SSOS bridging the qualitative with the quantitative data collection methods. Additionally, the descriptive notes may include some "key terms" associated with the program being implemented in the classroom. The purpose of including these "key terms" in the descriptive notes is to provide an opportunity "for identifying and describing potentially effective behavior which may become new categories in the instrument" (Schaffer, Nesselrodt, and Stringfield, 1991). All of the above sections refer only to the first page of the SSOS. Approximately 16 minutes of classroom time are required to complete this first page. We turn now to the second page.

The QAIT assessment begins on the second page of the SSOS (Schaffer, Nesselrodt, and Stringfield, 1991). QAIT is the acronym for (a) Quality of instruction, (b) Appropriateness of instruction, (c) Incentives for learning, and (d) Time involved in learning. The QAIT is a high-inference, sign system completed on the basis of the first 16 minutes of classroom observation. The QAIT sign system was designed by Slavin after his synthesis of research on learning (1987,

1989) and, also, on the work of Carroll on learning (1963, 1989). Slavin categorized the results of effective teaching and learning into the four elements in his QAIT. He then developed indicators of that research, or “signs,” to make up the instrument. Based on the observation and descriptive notes written for the prior 16 minutes of classroom time, the observer next completes the QAIT assessment signs, as appropriate. Curiously, the 1991 paper does not state exactly how many “signs” are in the QAIT at this point, but subsequent versions include 39 such “signs.”

The remaining two sections of the 1991 SSOS (Schaffer, Nesselrodt, and Stringfield, 1991) are completed at the end of the observation period. They are the classroom environment and resources and the program specific inventory. The former strives to measure the overall classroom environment and available resources and the latter assesses the degree of program implementation through the eyes of the observer. The classroom environment and resources section is a checklist that examines the presence or absence of both environmental and resource items. For example, in this version of the SSOS, noise outside the classroom could be assessed along a range of categories from “not in evidence” to “in great evidence” (p. 21). Contrastingly, resources (textbooks, maps, etc.) were marked in low-inference manner as “A” for “available” and “U” for “used” (p. 21). The last section of the SSOS was the program specific inventory. The purpose of this section is to assess the degree of implementation of the program under study. Typically, it is designed by the program developers and observing team together and usually consists of a set of items considered essential to the full implementation of the program. The observer makes judgments of the extent to which these program elements were evident (implemented) in the classroom observed.

In proposing the use of the SSOS as the classroom observation system to employ in the international study of school effectiveness, Schaffer, Nesselrodt, and Stringfield draw three main conclusions (1991, pp. 22-24). First, they conclude it is a viable observation instrument due to its “strong grounding in the current literature on effective teaching” (p. 22). Second, they conclude that the SSOS goes beyond the limited range of process-product research on teaching and learning because it combines both quantitative and qualitative research methodologies. Third, they conclude it is viable because it allows for the establishment of new categories of observation both during and after the data collection is completed without designing new instruments.

## **Second Publication About the SSOS**

As several scholars in the field note, classroom observation systems usually undergo refinements and adjustments over time and following their use in research studies. So, too, with the SSOS. The basic components and forms in the original SSOS were refined based on experience and as other researchers employed it in their studies. The nine basic components of the SSOS were described above and will not be repeated for each subsequent publication of it. Rather, these later descriptions will highlight any changes to any of those basic components.

The second publication of the SSOS was a paper presented by Nesselrodt and Schaffer (1993) at the Annual Meeting of the American Educational Research Association titled “The ISERP Programme: A Revised Classroom Observation Instrument.” The name of the program was the International School Effectiveness Research Programme, a multi-nation study to

investigate school effectiveness. Classroom observation was one data collection method for their research from the outset of the design. The researchers from the United States team offered the SSOS as the classroom observation instrument of choice. See the review directly above for more on this. The United States researchers did offer that the SSOS “was not perfect—that it was still being refined and reorganized in an attempt to strengthen it” (Nesselrodt & Schaffer, 1993, p. 5). They acknowledge that researchers in other nations in the ISERP have to improve the SSOS in order to “enable it to travel better” (p. 5).

The only component of the SSOS that was reported to be altered in the 1993 publication was the QAIT assessment. Recall, the 1991 QAIT component was a sign system of about 39 items identified by Slavin from an analysis of his research on effective teaching and learning and that of Carroll. The four elements in the QAIT are (a) Quality of instruction, (b) Appropriateness of instruction, (c) Incentives for learning, and (d) Time usage. The original version of the QAIT specified that it was to be completed every 16 minutes, after a pair of the 8-minute observations were completed.

Nesselrodt and Schaffer (1993) report that many of the researchers in the United States test of the SSOS expressed difficulties with the QAIT component. Two reasons for their difficulties were (1) the high level of inference required of the observer, and (2) its completion every 16 minutes increased the complexity of the SSOS. Nesselrodt and Schaffer found that researchers in other nations also reported some difficulties in their tests of the use of the SSOS. The Dutch contingent, especially, voiced several concerns. They felt its use in classrooms might produce a halo effect. They also found that reaching agreement across observers on the QAIT component was difficult for some of the items. Too, the Dutch researchers felt there were redundancies within the QAIT items.

To improve the QAIT component of the SSOS, the ISERP team made several changes to it (Nesselrodt & Schaffer, 1993). First, they reverted to Slavin’s original (1987) article to craft the wording of the QAIT items. In effect, this move simplified the QAIT from the original (1991) version. Second, they changed the instrument from a sign system to a rating instrument. To do this, “they added a Likert-type response scale of 1 (Unlike this class) to 5 (Like this class) for every item. QAIT completion time was changed to be at the very end of the observation period instead of every 16 minutes. Fourth, they rearranged the items to be fewer broad indicators and several behaviors that describe those indicators” (p. 7-8). Thus, by 1993, the QAIT component of the SSOS had morphed into a multiple-item rating scale with a 5-point Likert-style response option for every item, and now it was to be completed once per observation—at the end.

### **Third Publication About the SSOS**

The third publication of the SSOS that we have located was published in 1994. Readers should note that a 1992 paper presented at the annual meeting of the American Educational Research Association by Schaffer and Nesselrodt was about the development and testing of the SSOS, but we have been unable to retrieve a copy of that paper. In 1994, the SSOS appeared as Appendix B in the technical report *Urban and Suburban/Rural Special Strategies for Educating Disadvantaged Children: First Year Report* (Stringfield, Winfield, Millsap, Puma, Gamse, &

Randall, 1994). This report was the first report of a multiple-year research project to “examine promising alternatives to the services typically funded under Chapter 1” (p. i). The purposes of this large-scale research effort were to (1) describe promising alternatives to Chapter 1, (2) compare characteristics of those alternatives to the more traditional programs, and (3) assess the replicability of the most promising practices (Stringfield et al., 1994).

The methodology of the special strategies study was to secure a variety of quantitative and qualitative data from schools in urban and suburban/rural sites in the United States. A total of 25 sites in 17 states were in the study. Ten different programs, or strategies, were investigated including, for example, computer-assisted instruction, peer tutoring, Reading Recovery, and several schoolwide programs such as Success for All, Comer School Development, and Paideia Projects. Data were collected at all levels: student, classroom, school, program, and district. Qualitative data collected included interviews with parents, teachers, and administrators. Students, on the other hand, were shadowed for three whole days by researchers during program site visits. Quantitative data were collected via classroom observations conducted by the researchers.

Extensive qualitative and quantitative data were collected at the classroom level for the special strategies study. Researcher-compiled notes were a major form of the qualitative data collection. In terms of quantitative data collection at the classroom level, the SSOS instrument was employed. The authors report that the SSOS collected both low-inference and high-inference data. For a description and a copy of the SSOS as employed in the special strategies study, Stringfield et al. (1994) direct the reader to Appendix B of their report.

The version of the SSOS in Appendix B of the special strategies first year report is the third publication of the instrument that we can locate. Inspection of the SSOS in this 1994 report reveals that it obviously was implemented in the data collection process for the study before the refinements described in the 1993 publication (above) were made to the instrument. We say this with confidence because the top page for each coding time period appears as usual (i.e., activity codes, time, descriptive notes, student engagement rate, etc.) but the QAIT pages appear as the sign system from the earlier (1991) version and are not in the rating instrument format with 5-point Likert-style response options described in the second (1993) version directly above. Additionally, the sign system QAIT page appears immediately after the “regular” top page, which is meant to be completed in 16 minutes. From the version of the SSOS in Appendix B of the special strategies first year report, we infer that the changes made for the use of the SSOS in the international research study occurred *after* the 1991 version of the instrument was offered, accepted, and implemented in the data collection years preceding the publication of the first year report.

#### **Fourth Publication of the SSOS**

Nesselrodt and Schaffer (2000a) provide the fourth and final publication of the SSOS before AEL staff modified it and made it machine scorable. This version of the SSOS appeared as Appendix 2 in their evaluation report titled *External Evaluation of Kentucky’s Extended School Services, Spring 2000: Phase 1 - Final Report*. As the title suggests, the SSOS was one of several data collection instruments employed by the authors in a pilot test of the evaluation of

Kentucky's Extended School Services (ESS) program. The purposes of the pilot test were (a) conduct statistical analyses of state testing data, (b) design phase 2 of the evaluation, (c) redesign existing ESS forms, (d) pilot the tools designed to provide descriptions of the ESS program characteristics at the school and classroom level, and (e) design survey and interview tools.

The version of the SSOS in Appendix 2 of this report (Nesselrodt & Schaffer, 2000a) is like the 1993 version described above. That is, the first several pages contain the activity codes, time periods, descriptive notes, student engagement rates, and groups and activities. They state that this portion of the SSOS draws upon the Classroom Activity Record designed by Evertson and Burry (1989) and, also, the Stallings Observation System designed by Stallings (1983). The activity codes, time points, student engaged rates, and groups and activities rely on low-inference data collection. "The analysis of the occurrence of these significant events yields the types of instructional activities used by the teachers as well as the duration of each activity" (p. 7). The amount of on-task and off-task behaviors can be computed both for the overall classroom and also during special instructional activities. Further, grouping patterns of the teachers and the students can be determined. Because this version of the classroom observation page of the SSOS is the version that was modified by AEL staff, we include it here as Appendix A.

Following the four pages of the classroom observation form of Nesselrodt & Schaffer's 2000 SSOS (each page being for 16 minutes of observation) is the QAIT Assessment of Classroom instrument. Again, this is the 1993 version of the QAIT instrument because it is the rating instrument with the 5-point, Likert-style response options. These response options were from a low of 1 (Unlike the Class) to a high of 5 (Like the Class). The 39 individual items in the QAIT fit into broader categories or indicators, which then fit into even broader categories of (a) Quality of instruction, (b) Appropriateness of instruction, (c) Incentives for learning, and (d) Time usage. See Appendix B for a copy of the 2000 version of the QAIT rating instrument of the SSOS.

The last page of the 2000 SSOS is the classroom environment and resources instrument. This is the simple code checklist as it appears in the 1993 version of the SSOS. Here, ten environmental items are checked with either a "Yes" if they are in evidence during the observation or "No" if they are not in evidence. Next, 22 different resources are checked "V" if they are visible in the classroom and "U" if they are used during the period. See Appendix C for a copy of the classroom environment and resources checklist as it appears in the 2000a evaluation report by Nesselrodt and Schaffer.

A small group of field evaluators were trained in March 2000 to collect ESS program data through on-site visits to a small sample of sites (Nesselrodt & Schaffer, 2000a). One part of that 12 hour data collection training involved the use of the SSOS. This training included oral and written explanations of the components in the SSOS as well as practice in their use. This practice included coding of classroom vignettes from videotapes of classrooms. The training group was small and they were able to check for understanding of the SSOS throughout the training.

Data collection for the ESS on-site visits relative to the SSOS included the shadowing of four selected ESS students throughout a school day. With the targeted student as the focal point,

observers followed him/her into classrooms and any ESS sessions and completed the SSOS as trained. Thus, activity codes and time intervals for each class period were recorded as well as teacher/student groupings and student engagement rates for the whole class. “Additionally, a running narrative description of classroom activities was recorded with particular attention paid to the focal student(s) and their responses to the instruction received” (Nesselrodt & Schaffer, 2000a, p. 9). Completion of the QAIT instrument provided data on the quality and appropriateness of instruction, the incentives provided to students to learn, and how the time was used. Last, a record of the environment within the classroom and the resources visible and used was made via that checklist.

The resultant ESS pilot test data were analyzed at two levels to examine how this stage worked prior to the full-scale evaluation (Nesselrodt & Schaffer, 2000a). The data from all the sources were first analyzed at the elementary, middle, and high school levels. The second level of analysis was cross-site, both cross districts as well as by school level. Unfortunately, only the urban district in the pilot test had sufficient data to compare students’ experiences in their regular classrooms with their experiences in ESS sessions. The authors reported that data collection and analyses were possible with the SOSS and other instruments; however, they identified some issues in the evaluation pilot test. “Large amounts of data will take substantial effort to input and analyze” they say (p. 11). They opine that there will need to be strategies to handle large amount of data in the full-scale evaluation. Reduction in costs will result from less hand coding and reviewing. They recommended “the development of *optical scanning process* for the handling of large amounts of data” (emphasis added, p. 8). Finally, they uncovered a lack of variance among the 5-point ratings in the QAIT instrument and, thus, they recommended that the response option be changed to use only “observed” or “not observed” instead of the 5-point rating scale.

## **DEVELOPMENT AND PILOT TEST OF THE SPECIAL STRATEGIES OBSERVATION SYSTEM - REVISED**

This section describes how AEL staff became aware of the SSOS and how they revised it to be machine scorable for use for use in an evaluation study. After the background of AEL's introduction to the SSOS is presented, the revisions made to each section are explained.

### **Background of AEL's Staff's Involvement With the SSOS**

The Extended School System (ESS) program was established in 1990 as part of the Kentucky Education Reform Act. Designed specifically to address the needs of Kentucky's at-risk students, ESS is an aggressive, proactive program for addressing academic problems before they become engrained (Nesselrodt & Schaffer, 2000b). The ESS program extends the school day, week, or year for students at risk of academic failure, providing them with additional instructional time to help them meet academic goals. Rather than being an "add-on" or "stand alone" program, ESS is designed to be an integral part of each school's regular academic program, ensuring that students receive instructional assistance in core content subjects in which they are performing poorly (Cowley et al., 2002).

In the decade since ESS was established, three major within-state (internal) evaluations of the ESS program had been completed—in 1991, 1993, and 1998. In 1999, the Kentucky Commissioner of Education called for an external evaluation of the ESS, i.e., by an agency outside of Kentucky. The Kentucky Department of Education (KDE) staff approved an evaluation plan submitted by Drs. Pamela Nesselrodt and Eugene Schaffer of Dickinson College, Pennsylvania, and the University of Maryland, respectively. Their plan called for the evaluation to be piloted in the spring of 2000 and conducted during the 2000-2001 school year (Nesselrodt & Schaffer, 2000b). Their evaluation plan focused on four major categories related to the ESS program: (1) identification, referral, and assignment of services; (2) profiles of students receiving services; (3) profiles of ESS programs; and (4) outcomes of the program (Nesselrodt & Schaffer, 2000a). These evaluators recommended using a variety of data collection procedures, including written surveys of multiple groups, interviews with samples from those groups, written program description, classroom and ESS session observations using the Special Strategies Observation System, analysis of standardized achievement test scores, and statistical analysis of outcomes data.

Nesselrodt and Schaffer completed a pilot-test evaluation of the KDE ESS program in the spring of 2000 that resulted in two reports—one on the design, testing, and refinement of the instruments and their administration (2000a) and another on the refinement and finalization of research questions and the methodology (2000b). Thus, their 2000 pilot-test evaluation yielded a refined set of evaluation questions, a refined data collection design, recommended data collection procedures and instruments, and recommended data analyses procedures. Among other refinements and recommendations from their pilot-test were those pertaining to the SSOS. Basically, they felt that the SSOS (the fourth one published in the prior section) proved useful but the large volume of data it generates may be analyzed more efficiently and accurately if it were collected on optical scanning sheets (2000a).

In the fall of 2001, staff in KDE contracted with a partnership of AEL in Charleston, WV and Western Kentucky University for a comprehensive evaluation of the ESS program during the 2001-02 school year. Learnings from the Nesselrodt and Schaffer pilot-test evaluation were incorporated into five major categories. AEL's evaluation of the ESS program included two major components—statewide surveys and site visits. These components were broken into five main phases: (1) statewide surveys, (2) training session for site visits, (3) fall/winter site visits, (4) summer visits, and (5) data analyses. See Figure 2, from Cowley et al. (2002) for a graphic portrayal of AEL's evaluation design of the ESS program.

The major purposes for the site visits to schools in the fall/winter of 2001-02 and the summer of 2002 were “to provide intensive, extensive ESS program data that would be generalizable, valid, and reliable to Kentucky programs statewide and to corroborate findings from the statewide surveys previously administered to district and school ESS coordinators” (Cowley et al., 2002, p. 2). These site visits replicated most of the procedures and data collection instruments utilized in the pilot-test evaluation, with modifications to the SSOS as described below. A pair of trained data collectors made two to three day visits to a sample of 24 schools with ESS programs (18 during the fall/winter and 6 in the following summer) to collect both qualitative and quantitative data from a variety of ESS stakeholder groups. This data collection included classroom and ESS session observations employing the SSOS as revised by AEL staff to fit on optical scanning sheets. We move now to an explanation of the AEL revisions to the SSOS for use in the external evaluation of the ESS program.

### **AEL Revisions to SSOS Demographic Information**

Following up on the recommendation of Nesselrodt and Schaffer after their pilot-test evaluation, AEL staff converted all the data collection instruments to be machine scorable, including the SSOS. In the version of the SSOS used in the pilot-test of the evaluation by Nesselrodt and Schaffer (2000a, 2000b), which is the fourth published version discussed in the prior section, demographic information was solicited on the top quarter of the horizontally-formatted (landscape) page. Specifically, this version of the SSOS solicited seven pieces of information: (1) teacher number, (2) highest number of students in classroom, (3) school number, (4) highest number of adults in classroom, (5) subject, (6) observer, and (7) date.

For the AEL external evaluation of the ESS program, staff revised the collection of demographic information by changing it from the constructed-response format to the “fill in the bubble” selected-response format (Wiersma, 2000, p. 170). Also, as new space was required for the optical scan sheet “bubbles,” the demographic information requests were placed on a separate page. This page became the cover or top page of the SSOS data collection forms. Similar to the earlier requests for demographic information, the AEL revision solicited (1) observer number, (2) school number, (3) number of students in class, (4) number of adults in class, and (5) date. The AEL revision also solicited the subject name, but it did so through a series of 11 named optional bubbles to fill in and one for “other” and a line to write in the name of that other subject.

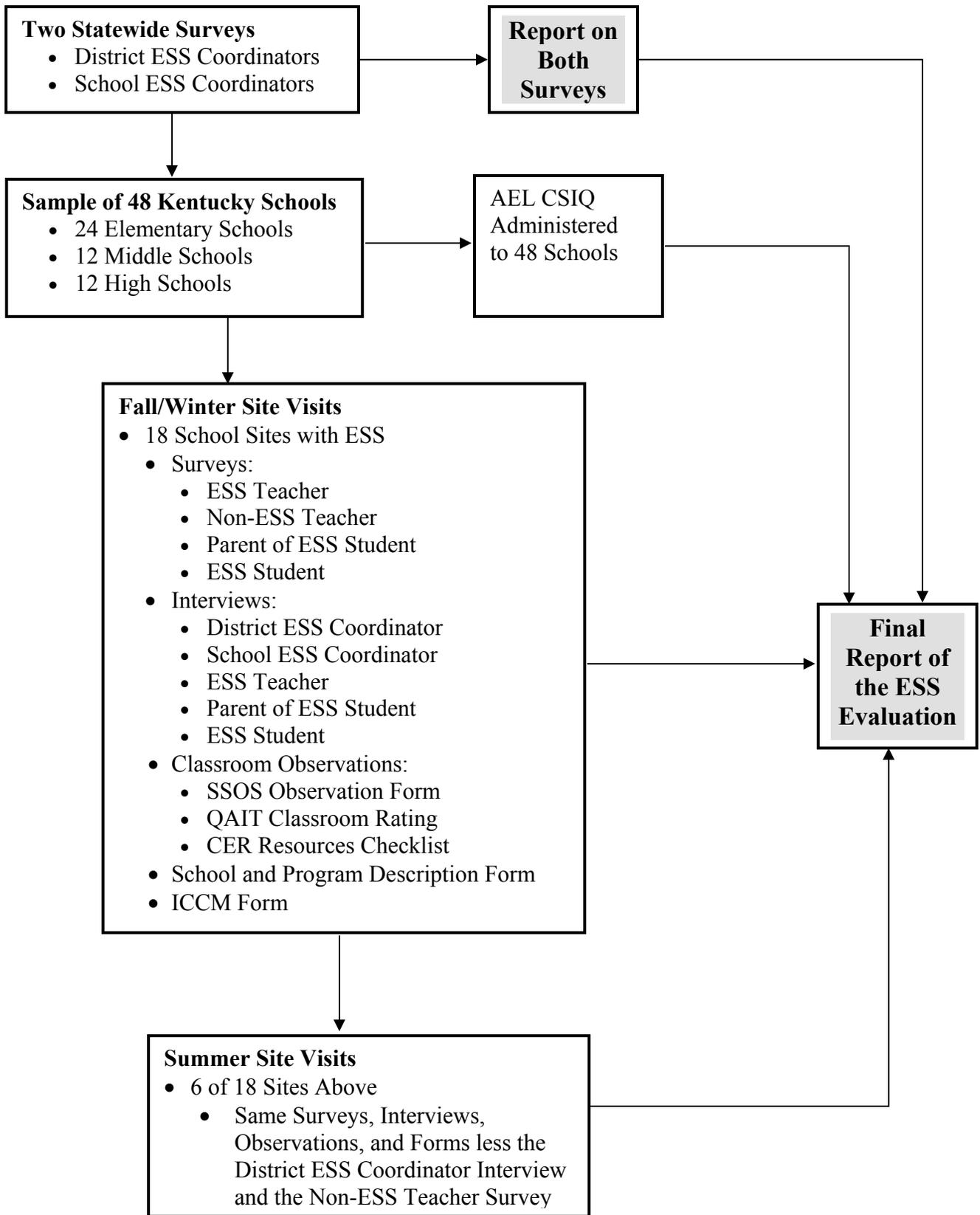


Figure 2: Graphic Portrayal of the Evaluation of the Kentucky Extended School Services Program

Three additional pieces of information were included on the revised AEL demographic page that were not on the Nesselrodt and Schaffer pilot-test version of the SSOS. First was the heading of “Target Student” and bubbles numbered 1, 2, and 3. Second was the heading “Type of Class” and the options “ESS” and “Regular” with one bubble each. Third, near the bottom of the page was a line named “Begin Class Observation at: \_\_\_\_: \_\_\_\_.” Here, the observer was to write in the observation start time, not so it could be bubbled, therefore analyzed, but mainly as a reminder to the observer when the session started just in case he/she lost track of time during the 60-minute observation period.

See Appendix D for a copy of the AEL-revised SSOS demographic page after the testing of it in the KDE ESS evaluation.

### **AEL Revision of the SSOS Eight-Minute Observation Page**

As above, AEL staff revised the SSOS eight-minute observation page to be optically scanned. The revision of the page required the most reformatting and the most changes from all prior SSOS forms. The most obvious difference between the former SSOS eight-minute observation pages and the optical scan form designed by AEL staff was the elimination of the large amount of lines and spaces for writing in descriptive notes and constructed-response data. Recall, the original SSOS page included activity codes, time spent, descriptive notes, student engagement rate, and groups and activities. All of these elements were retained in the AEL ESS test of the optical scan version of the page, but one—the descriptive notes component—was dropped after the ESS test. Formally, we now call this instrument the Classroom Observation Schedule. Each of the changes to the eight-minute page are described next.

The student engagement rate component was retained in the AEL revision; however, it was moved and cut in half. First, the student engagement rates of (a) number of students on task, (b) number of students off task, (c) number of students out of room, and (d) number of students waiting were moved by AEL staff to the upper left half of the horizontal format (landscape) optical scan page. Here, two rows of numbered bubbles allowed the observer to record as many as 99 students in each engagement rate category. Second, while the original SSOS observation page was designed for 16 minutes of observation and included two sets of student engagement rates, AEL staff changed the page to be for only 8 minutes and, thus, included only one set of student engagement ratings to be bubbled in by the observer.

Next, the groups and activities component was similar to the student engagement rate component above in that it, too, was moved on the page and cut in half. The groups and activities component was moved to the bottom quarter of the horizontal (landscape) page, from the left side to the right side. The four main types of groups (teacher, aide, and two student groups) were retained from the original SSOS as was the four major types of activities each group could be engaged in (interactive instruction, work alone, management/directions, and social/uninvolved). Then, for each group and activity, two rows of numbered bubbles for students are arranged for the observer to complete, again up to a maximum of 99 students. Together, the student engagement on the upper left and the groups and activities across the bottom of the page form what the AEL observation trainers nicknamed the “L” part of the eight-minute observation page.

Up to this point in the discussion of AEL's revisions, activity codes, time spent, and descriptive notes have not been discussed. Revisions to these components of the SSOS page will be discussed here. First, the 15 original SSOS activity codes were expanded to a total of 27, given letters for each inside the bubbles, and positioned in the middle of the page, from the top down to the bottom one quarter of the page where the groups and activities section was placed. The 15 original activity codes were in the three groups of (1) Teacher Led, (2) Student/Group Led, and (3) Management/Organization. All 15 original SSOS activity codes were retained in the AEL revision; however, the "Student Presentation (1 min.)" was reworded to be "Student-Initiated Questions" (Cowley et al., 2002), in the Student/Group Led group. Stated differently, all of Teacher Led and Management/Organization activity codes from the original SSOS were retained by AEL staff in the ESS optical scan version. To those 15 activity codes, AEL staff added 12 new codes along with attendant definitions. All 12 AEL activity codes were in the Student/Group Led group in order to collect more detailed behavioral data on students. Specifically, the new AEL activity codes were:

- Individual seatwork at computer,
- Pairs or group seatwork at computer,
- Sustained writing or composition,
- Sustained reading,
- Hands-on learning,
- Independent inquiry or research,
- Nonacademic activity,
- Not occupied,
- Off-task, and
- Out of room (Cowley et al., 2002).

Together, the 27 activity code bubbles were repeated six times in the block of space on the page reserved for them. Thus, a total of six different activities could be coded for the target student being observed during the eight-minute time period. Interestingly, the 27 activity codes on the AEL-revised SSOS were just one more code than in sections of Stallings' Five-Minute Interaction (1977) and also just one more behavioral category than in Anderson's system (1945).

Now we turn to the time-spent component. In this case, the time period was converted from a constructed-response column to a series of single digit bubbles (up to the maximum of eight minutes) for each of the six blocks of activity codes. Physically, these time-spent bubbles were placed in a column next to the activity codes. When one activity being coded ends inside the eight-minute segment, the observer then coded in how long the subject was involved in that activity.

Last, a column for short notes was included on the ESS optical scan eight-minute observation page to the right of the time spent column. This column of constructed response entries could not be scanned by the machine, but it was thought at the time that these notes might be helpful to understand the coded activities, especially for unusual changes in activities, clarifications, or other helpful explanations. This column for notes did not prove useful in the ESS test of the optical scan page and, thus, was omitted in the present version of the AEL optical scan eight-minute observation page.

See Appendix E for a copy of the revised SSOS eight-minute observation page after being tested in the ESS evaluation.

### **AEL Revision of the QAIT Assessment Instrument**

The QAIT assessment instrument was one of two instruments to be completed at the end of the observation session. The QAIT is a rating instrument with a 5-point Likert-style response option for each item. In its original SSOS, the QAIT was on two pages, vertically (portrait) formatted, containing 39 items in four major groups (Quality of instruction, Appropriateness of instruction, Incentives for learning, and Time usage), and lacked directions for completion. To make the QAIT instrument compatible with optical scan equipment, AEL staff (a) switched the format to horizontal (landscape) to fit with the other AEL-revised SSOS pages, (b) “added a sentence of instructions,” (c) removed the Roman numerals designating the four major QAIT headings,” and (d) changed the first-level indicators to be numbered, with the items under those indicators assigned lower-case letters.

AEL staff made only one substantive change in the QAIT from the former constructed-response format to the optical scan format. In the Quality of Instruction heading of the 2000 QAIT, indicator number 5 is “Lesson objectives are clearly stated” (Nesselrodt & Schaffer, 2000a, Appendix 2). However, the items to be rated under this indicator are “Conducts formal and/or informal assessment,” and “Provides immediate and correct feedback” (2000a, Appendix 2). The AEL evaluators judged this pair of ratings to be related to the indicator, but not as directly as a new item might be related. Accordingly, AEL staff wrote and added in a new item to closely match the wording in the indicator. It is “States lesson objectives orally or in writing” (Cowley et al., 2002, Appendix G). Thus, the AEL revision of the QAIT assessment contained 40 items to rate as opposed to 39 items in the 2000 version of the SSOS.

See Appendix F for a copy of the AEL-revised QAIT assessment rating instrument as used both during and after the testing of it in the ESS evaluation.

### **AEL Revision of the Classroom Environment and Resources Checklist**

The last instrument in the original SSOS was the classroom environment and resources checklist. Like the QAIT instrument above, this checklist was to be completed at the end of the observation period. And, also like the QAIT instrument, the classroom environment and resources was (a) vertically formatted (portrait) and (b) lacked instructions for completion. AEL staff switched the format to horizontal (landscape) when revising it to be compatible with optical scanning and they also added short directions for completing the checklist.

The original version of the classroom environment and resources contained ten environmental items, each with two response options. The response options were “yes, in evidence” and “no, not in evidence” (Nesselrodt & Schaffer, 2000a, Appendix 2). Of the ten original environmental items, AEL staff retained nine, added in two new ones, and reworded one item for a new total of 12 environmental items. The new items were (a) “Posted classroom rules,” and (b) “No distracting internal noises/interruptions”(Cowley et al., 2002, Appendix G).

AEL staff revised the former “Daily routine is flexible” to “Open, risk-free environment” (Cowley et al., Appendix G). Also, AEL staff revised the response option to be a single bubble to be filled in if the environmental item was evident during the classroom. The 12 revised environmental items were placed in a column on the left side of the optical scan page.

A total of 22 resources of various types were positioned on the bottom two-thirds of the original, vertical (portrait) format, checklist. The constructed-response options were “V - Visible in classroom,” and “U - Used this period” (Nesselrodt & Schaffer, 2000a, Appendix 2). AEL staff retained these response options, but made them bubbles to fill in. The original responses numbered 22, but several were specific types of a more broad class. For example, the original “Audio Tapes,” “CD Player,” “Record Player,” and “Tape Recorder,” were all varieties of audio resources, so AEL staff combined them into a single item named “Audio resources” (Cowley et al., 2002, Appendix G). Similarly, several types of video resources were combined into an item named just that. Also, AEL staff combined “maps” and “globe” together. Next, AEL staff added new resources to the optical scan checklist. These included “Worksheets,” “Journals/learning logs,” “Reference materials,” “Instructional aids/props,” “Student-used equipment,” and “Student manipulatives/hands-on materials” (Cowley et al., 2002, Appendix G). Also, “puzzles” was added to “games.” In the end, the AEL list of resources included 18 items; these were arranged in two columns on the right side of the scorable page.

See Appendix G for a copy of the revised classroom environment and resources checklist after testing in the ESS evaluation.

## SUMMARY

The Special Strategies Observation System (SSOS) is an interesting classroom observation system because it (a) was developed after process-product research on the teaching/learning process declined and (b) it purposefully combined qualitative data collection techniques with the more quantitative techniques. Originally developed for a large-scale study of special programs in schools in the United States in the early 1990s, the SSOS later was altered a little for use in an international research study on school effectiveness in the mid-1990s. In 2000, it was refined a little more for use in the pilot test of an evaluation plan for studying the Extended School Services program in Kentucky.

Nesselrodt and Schaffer (2000a, 2000b) describe the SSOS as a system because it consists of three data collection instruments combined into one set. The main classroom observation page consists of elements adapted from Stallings (1977) and Evertson et al. (1980). The “engaged rate” section records the number of students “on task,” “off task,” or “waiting.” The grouping patterns in the classroom are recorded by noting how many students are with the teacher, aide, or other students. Next, a running narrative of the classroom instruction is written on the page and activity and time codes are assigned to those activities. This page was completed for 16-minute time periods. At the end of the total observation period, a 39-item rating instrument on the Quality of instruction, Appropriateness of Instruction, Incentives for learning, and Time usage (or QAIT, for short) was completed. This instrument was developed by Slavin based on his analysis of educational research (1987, 1989). The third instrument in the SSOS was the checklist of classroom environment and resources. This, too, was employed at the conclusion of the observation.

The final iteration of the SSOS before AEL researchers revised it was employed in a pilot test of an evaluation plan for the study of the statewide program for struggling learners in Kentucky, the Extended School Services program. The authors of that evaluation plan and its pilot test, Nesselrodt and Schaffer (2000a, 2000b), concluded that the data collection instruments should be converted to optical scan sheets in the full-scale evaluation of the ESS program.

In the fall of 2001, staff at AEL collaborated with staff at Western Kentucky University to complete that full-scale evaluation of the Kentucky ESS program. In doing so, AEL staff followed the advice of Nesselrodt and Schaffer and converted all the data collection instruments (except interview protocols) to a machine-scorable format, including the SSOS. Here, AEL staff changed the (a) demographic information page, (b) eight-minute observation page, (c) QAIT assessment instrument, and (d) classroom environment and resources checklist so that all could be scored by optical scanning equipment. The largest change was the addition of 12 student activities to the original 15 teacher-led activities.

The revised machine-scorable version of the SSOS was employed to observe 213 classrooms and ESS sessions by AEL staff in the 2001-02 school year during 24 school site visits in Kentucky. Generally, the revised SSOS worked well for data collection purposes of the classroom observations, but the optical scanning of those pages was less than desirable. They did

scan, but the close fit of the bubbles required hand processing to secure clean data. Consequently, AEL staff again revised the SSOS to eliminate this scanning difficulty.

The SSOS, as revised by AEL researchers, has proven its utility in collecting valuable data regarding the teaching/learning process in naturalistic settings. The revised SSOS yields much valuable classroom interaction, processes, environment, and resources information for research or evaluation purposes. Already, it has shown its flexibility by being refined just slightly for use in a study of the achievement gap in a medium-sized city. In order to reflect the fact that the SSOS has been refined from its earlier uses in the 1990s and, also, has been completely converted for optical scanning, we label this newest version as the Special Strategies Observation System-Revised, or SSOS-R, for short.

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## **APPENDIXES**

**Appendix A:**

**SSOS, Year 2000 Version of the Classroom Observation Form**

# SPECIAL STRATEGIES OBSERVATION SYSTEM (S.S.O.S.)

Teacher # \_\_\_\_\_ Date \_\_\_\_\_  
 School # \_\_\_\_\_ Subject \_\_\_\_\_  
 Highest # of students \_\_\_\_\_ Highest # of adults \_\_\_\_\_ Observer \_\_\_\_\_  
 in classroom \_\_\_\_\_ in classroom \_\_\_\_\_

ACTIVITY CODE	TIME	DESCRIPTIVE NOTES	18 minutes after published time to begin interaction						
			STUDENT ENGAGEMENT TIME: _____ a.m./p.m. # ON TASK _____ # OFF TASK _____ WAITING _____ # OUT OF ROOM _____ GROUPS AND ACTIVITIES TASK # STUDENTS TEACHER _____ AIDE _____ STUDENTS _____ STUDENTS _____						
			26 minutes after published time to begin interaction STUDENT ENGAGEMENT TIME: _____ a.m./p.m. # ON TASK _____ # OFF TASK _____ WAITING _____ # OUT OF ROOM _____ GROUPS AND ACTIVITIES TASK # STUDENTS TEACHER _____ AIDE _____ STUDENTS _____ STUDENTS _____						
ACTIVITY CODE KEY <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>TEACHER LED</b>            1=Teacher presentation of Content            2=Recitations/Discussion            3=Directions for Assignments            7=Small Group Instruction            8=Tests            11=Checking         </td> <td style="width: 50%; vertical-align: top;"> <b>STUDENT/GROUP</b>            4=Individual Seatwork            5=Pairs or Group Seatwork            6=Student Presentation (1 min)         </td> </tr> <tr> <td colspan="2" style="text-align: center;"><b>MANAGEMENT/ORGANIZATION</b></td> </tr> <tr> <td colspan="2">           9=Procedural/Behavioral Presentation (1)            10=Administrative Routines            12=Transitions            13=Nonacademic Activity            14=Waiting Time            15=Discipline (1)         </td> </tr> </table>			<b>TEACHER LED</b> 1=Teacher presentation of Content 2=Recitations/Discussion 3=Directions for Assignments 7=Small Group Instruction 8=Tests 11=Checking	<b>STUDENT/GROUP</b> 4=Individual Seatwork 5=Pairs or Group Seatwork 6=Student Presentation (1 min)	<b>MANAGEMENT/ORGANIZATION</b>		9=Procedural/Behavioral Presentation (1) 10=Administrative Routines 12=Transitions 13=Nonacademic Activity 14=Waiting Time 15=Discipline (1)		<b>KEY TO TASKS</b> I = Interactive Instruction W = Work Alone M = Management/Directions S = Social or uninvolved
<b>TEACHER LED</b> 1=Teacher presentation of Content 2=Recitations/Discussion 3=Directions for Assignments 7=Small Group Instruction 8=Tests 11=Checking	<b>STUDENT/GROUP</b> 4=Individual Seatwork 5=Pairs or Group Seatwork 6=Student Presentation (1 min)								
<b>MANAGEMENT/ORGANIZATION</b>									
9=Procedural/Behavioral Presentation (1) 10=Administrative Routines 12=Transitions 13=Nonacademic Activity 14=Waiting Time 15=Discipline (1)									

**Appendix B:**

**SSOS, Year 2000 Version of the QAIT Assessment Instrument**

# QAIT ASSESSMENT OF CLASSROOM

	Unlike this Class			Like this Class	
<b>I. Quality of Instruction</b>					
A. Lessons make sense to students. The teacher:					
1. Organizes information in an orderly way	1	2	3	4	5
2. Notes transitions to new topics	1	2	3	4	5
3. Uses many vivid images and examples	1	2	3	4	5
4. Frequently restates essential principles	1	2	3	4	5
B. Lessons relate to students' background. Teacher:					
1. Uses devices such as advanced organizers	1	2	3	4	5
2. Reminds students of previously learned materials	1	2	3	4	5
C. Teacher exhibits enthusiasm	1	2	3	4	5
D. Teacher shows sense of humor	1	2	3	4	5
E. Teacher clearly specifies objectives of lesson. Teacher:					
1. Conducts formal and/or informal assessment	1	2	3	4	5
2. Provides immediate and correct feedback	1	2	3	4	5
F. Teachers uses an appropriate pace to cover content	1	2	3	4	5
<b>II. Appropriate Level of Instruction</b>					
A. Instructional strategies match students' abilities. Teacher:					
1. Accommodates students' level of prior knowledge	1	2	3	4	5
2. Accommodates students' different learning rates	1	2	3	4	5
B. Grouping strategies enable students to work together or alone. The teacher:					
1. Uses in-class ability grouping	1	2	3	4	5
2. Has a class that is homogeneous in ability	1	2	3	4	5
3. Bases instruction on mastery of skills and/or concepts	1	2	3	4	5
4. Uses individualized instruction	1	2	3	4	5
5. Uses cooperative learning arrangements	1	2	3	4	5

QAIT (Con't)

III. Incentive	Unlike this Class			Like this Class	
A. Teacher arouses student curiosity by:					
1. Presenting surprising demonstrations	1	2	3	4	5
2. Relating topics to students' lives	1	2	3	4	5
3. Allowing students to discover information	1	2	3	4	5
4. Presenting intrinsically interesting material	1	2	3	4	5
B. Teacher uses extrinsic academic incentives such as:					
1. Praise and feedback	1	2	3	4	5
2. Accountability	1	2	3	4	5
3. Homework checks	1	2	3	4	5
4. Waiting for responses	1	2	3	4	5
5. Guiding partial responses	1	2	3	4	5
6. Tokens and rewards	1	2	3	4	5
7. Communicating high expectations	1	2	3	4	5
8. Small groups with individual incentives	1	2	3	4	5
9. Students encourage one another to achieve	1	2	3	4	5
10. Group contingencies	1	2	3	4	5
C. Teacher uses extrinsic behavioral incentives such as:					
1. Praise	1	2	3	4	5
2. Tokens and rewards for improvement	1	2	3	4	5
3. Group contingencies	1	2	3	4	5
D. Teacher provides instruction appropriate for student abilities:					
1. Effort by the student leads to success	1	2	3	4	5
IV. Time					
A. Allocated time					
1. Necessary time is allocated for instruction	1	2	3	4	5
B. Engaged rates					
1. Teacher uses effective management	1	2	3	4	5
2. Students attend to lessons	1	2	3	4	5

**Appendix C:**

**SSOS, Year 2000 Version of the Classroom Environment and Resources Checklist**

### Classroom Environment

Yes = in evidence      No = not in evidence

Use of multi-racial materials	_____	Distinct activity centers	_____
Use of non-sexist materials	_____	Lighting is adequate	_____
Daily routine is flexible	_____	Ventilation/temperature is comfortable	_____
Assignments are posted	_____	Student work on bulletin boards	_____
Classroom is cheerful and inviting	_____	Noise from outside is distracting	_____

### Resources

V = Visible in classroom

U = Used this period

Textbooks	V	U	Overhead Projector	V	U
Workbooks	V	U	Filmstrips	V	U
Reference Books	V	U	Record Player	V	U
Classroom Library	V	U	Tape Recorder	V	U
Maps	V	U	CD Player	V	U
Globe	V	U	Records	V	U
Audio Tapes	V	U	Video Disk	V	U
Computers	V	U	TV	V	U
Games	V	U	Simulations	V	U
Other Hands-On Materials	V	U	Science Table(s)	V	U
Student Chalkboard	V	U	Teacher Chalkboard	V	U

**Appendix D:**

**AEL-Revised Version of the SSOS-R Demographic Page**

## Special Strategies Observation System - Revised (SSOS-R)

Observer number: 0 1 2 3 4 5 6 7 8 9

School number: 0 1 2 3 4 5 6 7 8 9

# students in class: 0 1 2 3 4 5 6 7 8 9

Teacher #: 1 2 3 4 5 6 7 8 9

# adults in class: 0 1 2 3 4 5 6 7 8 9

Grade Level:  Kind.  1<sup>st</sup>  2<sup>nd</sup>  3<sup>rd</sup>  4<sup>th</sup>  5<sup>th</sup>  6<sup>th</sup>  7<sup>th</sup>  8<sup>th</sup>  9<sup>th</sup>  10<sup>th</sup>  11<sup>th</sup>  12<sup>th</sup>

Subjects:  English  History  Humanities  Language Arts  Mathematics  Practical Living  Reading  Science

Date: (two-digit month, day, year) 0 1 2 3 4 5 6 7 8 9

Target Student: 1 2 3

Ethnicity:	Teacher	Student
White	<input type="radio"/>	<input type="radio"/>
African American	<input type="radio"/>	<input type="radio"/>
Biracial/Multiracial	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

Gender:	Teacher	Student
Male	<input type="radio"/>	<input type="radio"/>
Female	<input type="radio"/>	<input type="radio"/>

Social Studies  
 Vocational Studies  
 Writing  
 Interdisciplinary  
 Other: \_\_\_\_\_

Begin class observation at: \_\_\_\_\_:\_\_\_\_\_

**Appendix E:**

**AEL-Revised Version of the SSOS-R Eight-Minute Observation Page**

2nd minute of observation should begin at: \_\_\_\_\_ ; \_\_\_\_\_

Class Snapshot 2nd minute of observation	Ongoing Activities of Teacher																															
	Activity Code	Time Spent on Activity																														
<p><i>Student Engagement:</i></p> <p>Number of students on task:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students off task:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students out of room:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students waiting:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p>	<p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p>	<p>1 2 3 4 5 6 7 8</p>																														
<p><i>Groups and Activities:</i></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 15%;">Task</th> <th style="width: 20%;">Number of Students</th> <th style="width: 10%;"></th> <th style="width: 15%;">Task</th> <th style="width: 20%;">Number of Students</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Tchr.</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td style="vertical-align: top;">Stds.</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> <tr> <td style="vertical-align: top;">Aide</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td style="vertical-align: top;">Stds.</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> </tbody> </table>				Task	Number of Students		Task	Number of Students	Tchr.	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9	Aide	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9
	Task	Number of Students		Task	Number of Students																											
Tchr.	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9																											
		0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9																											
Aide	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9																											
		0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9																											

**Appendix F:**

**AEL-Revised Version of the SSOS-R QAIT Assessment of Classroom Instrument**

**Project Name:**  
**QAIT\* Assessment of Classroom**

*Please indicate the extent to which the following items were observed by filling in the respective bubbles, using a scale of 1 (Unlike this class) to 5 (Like this class).*

	<i>Unlike this class</i>	<i>Like this class</i>		<i>Unlike this class</i>	<i>Like this class</i>
<b>Quality of Instruction</b>			<b>Quality of Instruction (continued)</b>		
1. Lessons make sense to students. The teacher:			4. The teacher shows a sense of humor.	(1) (2) (3) (4) (5)	
a. Organizes information in an orderly way.	(1) (2) (3) (4) (5)		5. Lesson objectives are clearly specified.		
b. Notes transitions to new topics.	(1) (2) (3) (4) (5)		The teacher:		
c. Uses many vivid images and examples.	(1) (2) (3) (4) (5)		a. States lesson objectives orally or in writing.	(1) (2) (3) (4) (5)	
d. Frequently restates essential principles.	(1) (2) (3) (4) (5)		b. Conducts formal and/or informal assessment.	(1) (2) (3) (4) (5)	
2. Lessons relate to students' background.			c. Provides immediate and corrective feedback.	(1) (2) (3) (4) (5)	
The teacher:			6. Teachers use an appropriate pace to cover content.	(1) (2) (3) (4) (5)	
a. Uses devices such as advanced organizers.	(1) (2) (3) (4) (5)				
b. Reminds students of previously learned materials.	(1) (2) (3) (4) (5)				
3. The teacher exhibits enthusiasm.	(1) (2) (3) (4) (5)				

\*QAIT stands for Quality of Instruction, Appropriate Level of Instruction, Incentives for Learning, and Use of Time.

Continue Ö

*Unlike  
this class*      *Like  
this class*

### Appropriate Level of Instruction

7. Instructional strategies match students' abilities. The teacher:
- a. Accommodates students' levels of prior knowledge.      (1) (2) (3) (4) (5)
  - b. Accommodates students' different learning rates.      (1) (2) (3) (4) (5)
8. Grouping strategies enable students to work together or alone. The teacher:
- a. Uses in-class ability grouping.      (1) (2) (3) (4) (5)
  - b. Has a class that is homogeneous in ability.      (1) (2) (3) (4) (5)
  - c. Uses cooperative learning arrangements.      (1) (2) (3) (4) (5)
  - d. Bases individual instruction on mastery of skills and/or concepts.      (1) (2) (3) (4) (5)
  - e. Uses individualized instruction.      (1) (2) (3) (4) (5)

### Incentives for Learning

9. The teacher arouses students' curiosity by:
- a. Presenting surprising demonstrations.      (1) (2) (3) (4) (5)
  - b. Relating topics to students' lives.      (1) (2) (3) (4) (5)
  - c. Allowing students to discover information.      (1) (2) (3) (4) (5)
  - d. Presenting intrinsically interesting material.      (1) (2) (3) (4) (5)
10. The teacher uses extrinsic academic incentives such as:
- a. Praise and feedback.      (1) (2) (3) (4) (5)
  - b. Accountability.      (1) (2) (3) (4) (5)
  - c. Homework checks.      (1) (2) (3) (4) (5)

*Unlike  
this class*      *Like  
this class*

### Incentives for Learning (continued)

- d. Waiting for responses.      (1) (2) (3) (4) (5)
  - e. Guiding partial responses.      (1) (2) (3) (4) (5)
  - f. Tokens and rewards.      (1) (2) (3) (4) (5)
  - g. Communicating high expectations.      (1) (2) (3) (4) (5)
  - h. Small groups with individual incentives.      (1) (2) (3) (4) (5)
  - i. Students encourage one another to achieve.      (1) (2) (3) (4) (5)
  - j. Group contingencies.      (1) (2) (3) (4) (5)
11. The teacher uses extrinsic behavioral incentives such as:
- a. Praise.      (1) (2) (3) (4) (5)
  - b. Tokens and rewards for improvement.      (1) (2) (3) (4) (5)
  - c. Group contingencies.      (1) (2) (3) (4) (5)
12. The teacher provides instruction that is appropriate for students' abilities:
- a. Efforts by the student lead to success.      (1) (2) (3) (4) (5)

### Use of Time

13. Allocated time:
- a. Necessary time is allocated for instruction.      (1) (2) (3) (4) (5)
14. Engaged rates:
- a. The teacher uses effective management.      (1) (2) (3) (4) (5)
  - b. Students attend to lessons.      (1) (2) (3) (4) (5)

**Appendix G:**

**AEL-Revised Version of the SSOS-R Classroom  
Environment and Resources Checklist**

## Classroom Environment and Resources Checklist

*Please indicate which of the following options were evident in the classroom by filling in the respective bubbles.*

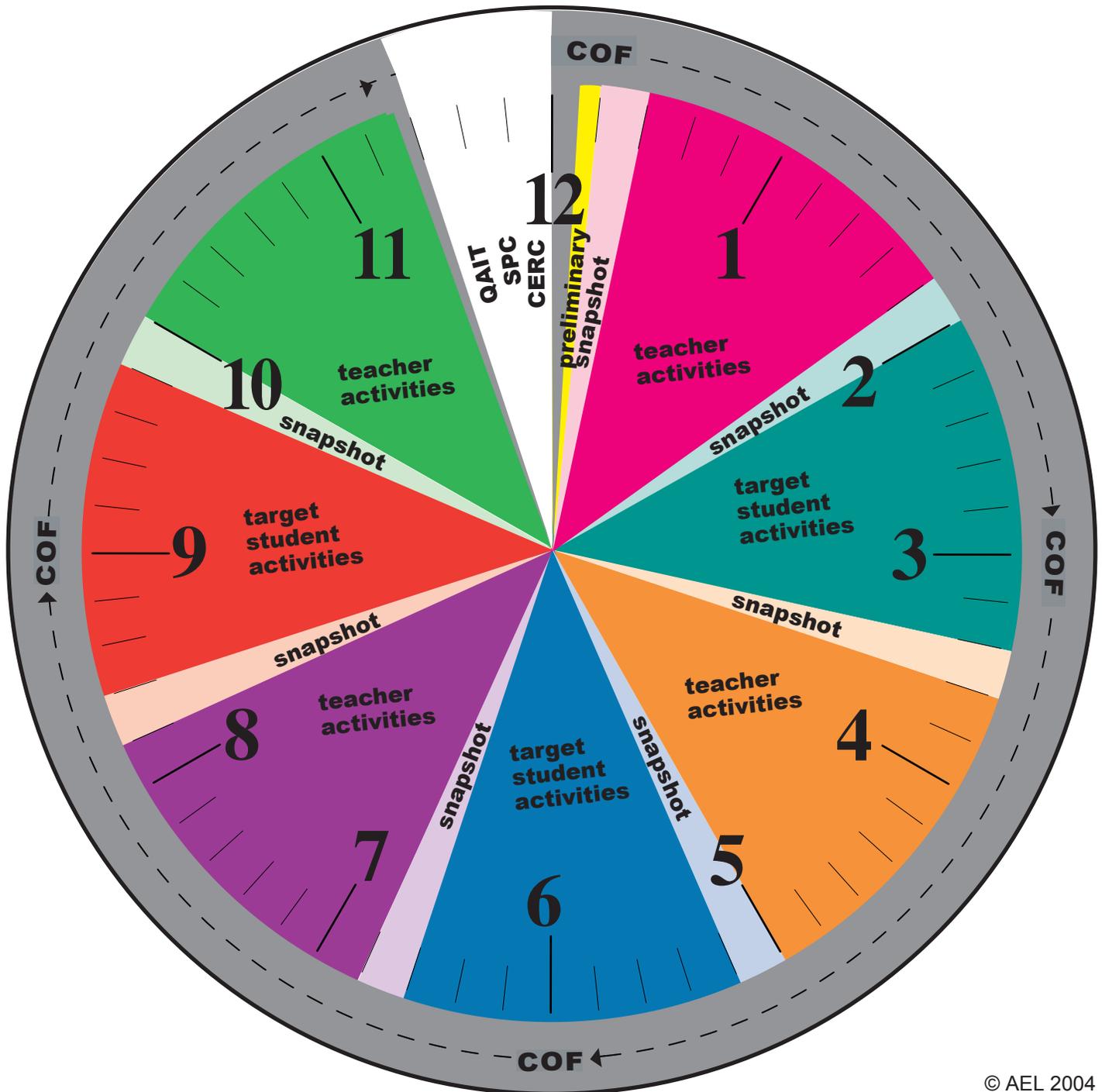
*Please indicate whether the following resources were visible in the classroom (Vis.) and whether they were actually used during the observation (Used) by filling in the respective bubbles.*

- |  | Vis.                  | Used                  |                            | Vis.                  | Used                  |
|--|-----------------------|-----------------------|----------------------------|-----------------------|-----------------------|
| <input type="radio"/> Culturally mediated instruction              | <input type="radio"/> | <input type="radio"/> | Textbooks                  | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Student-controlled classroom discourse       | <input type="radio"/> | <input type="radio"/> | Workbooks/activity books   | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Use of multi-racial materials                | <input type="radio"/> | <input type="radio"/> | Worksheets/activity sheets | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Use of non-sexist materials                  | <input type="radio"/> | <input type="radio"/> | Journals/learning logs     | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Posted classroom rules                       | <input type="radio"/> | <input type="radio"/> | Classroom library          | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Posted assignments                           | <input type="radio"/> | <input type="radio"/> | Reference materials        | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Cheerful and inviting classroom              | <input type="radio"/> | <input type="radio"/> | Map and/or globe           | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Distinct activity centers                    | <input type="radio"/> | <input type="radio"/> | Games and/or puzzles       | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Adequate lighting                            | <input type="radio"/> | <input type="radio"/> | Instructional aids/props   | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Comfortable ventilation/temperature          | <input type="radio"/> | <input type="radio"/> | Science/lab table(s)       |                       |                       |
| <input type="radio"/> Student work displayed                       | <input type="radio"/> | <input type="radio"/> | Classroom chalkboard       |                       |                       |
| <input type="radio"/> No distracting internal noises/interruptions | <input type="radio"/> | <input type="radio"/> | Student-used equipment     |                       |                       |
| <input type="radio"/> No distracting external noises/interruptions | <input type="radio"/> | <input type="radio"/> |                            |                       |                       |
| <input type="radio"/> Open, risk-free environment                  |                       |                       |                            |                       |                       |

Section 3:

SSOS-R Clock

# Special Strategies Observation System-Revised (SSOS-R)



## Section 4:

### Cover Page Instructions

## INSTRUCTIONS FOR COMPLETING THE SSOS-R COVER PAGE

After entering the classroom, during the first minute of the observation, complete all of the descriptive items on the cover page of the SSOS-R. This includes the date, observer code, school code, teacher code, number of students in the classroom, number of adults in the classroom, grade level, subject being observed, student and teacher ethnicity, and student and teacher gender. A list of code numbers for observers and schools will be generated as appropriate. The number of students should include any who are presently out of the room (i.e., in the restroom, in the principal's office, in another classroom for part of the observation, etc.). The number of adults should include only those involved in the academic process (i.e., a visitor to the class would not be counted unless he/she was involved in some way with instruction); and, of course, do not count yourself.

During this first minute, randomly select a student on whom to focus for the targeted student observation portion of the COF. If you are doing multiple observations, try to get a general representation by gender, ethnicity, seating location, ability levels, etc.

Project Name:  
Special Strategies Observation System-Revised (SSOS-R)

Observer number: 0 1 2 3 4 5 6 7 8 9

School number: 0 1 2 3 4 5 6 7 8 9

# students in class: 0 1 2 3 4 5 6 7 8 9

Teacher #: 1 2 3 4 5 6 7 8 9

# adults in class: 0 1 2 3 4 5 6 7 8 9

Grade Level:  Kind.  1<sup>st</sup>  2<sup>nd</sup>  3<sup>rd</sup>  4<sup>th</sup>  5<sup>th</sup>  6<sup>th</sup>  7<sup>th</sup>  8<sup>th</sup>  9<sup>th</sup>  10<sup>th</sup>  11<sup>th</sup>  12<sup>th</sup>

Subjects:  English  History  Humanities  Language Arts  Mathematics  Practical Living  Reading  Science  Social Studies  Vocational Studies  Writing  Interdisciplinary  Other: \_\_\_\_\_

Date: (two-digit month, day, year) 0 1 2 3 4 5 6 7 8 9

Ethnicity:	Teacher	Student
Amer. Indian or Alaska Native	<input type="radio"/>	<input type="radio"/>
Asian	<input type="radio"/>	<input type="radio"/>
African American	<input type="radio"/>	<input type="radio"/>
Biracial/Multiracial	<input type="radio"/>	<input type="radio"/>
Hispanic/Latino(a)	<input type="radio"/>	<input type="radio"/>
Pacific Islander	<input type="radio"/>	<input type="radio"/>
White	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

Gender:	Teacher	Student
Male	<input type="radio"/>	<input type="radio"/>
Female	<input type="radio"/>	<input type="radio"/>

Section 5:

COF Instructions

## INSTRUCTIONS FOR COMPLETING THE COF

At the beginning of the second minute of the observation, the first 8-minute observation block begins. The observer should complete the Class Snapshot segment of the coding box (the L-shaped section containing the "Student Engagement" and "Groups and Activities" components), which focuses on the entire class. Under Student Engagement, the observer codes the number of students on task, the number off task, the number of students waiting, and the number of students out of the room (see "COF Student Engagement Definitions"). Under Groups and Activities, the observer codes teacher task behavior and the number of students involved with the teacher, aide task behavior and the number of students involved with the aide, and up to two different student groupings (these may be actual groups or students may be working individually) with the number of students involved (see "COF Groups and Activities Definitions"). This activity may or may not take the entire first minute of the 8-minute block. If most of the minute is not needed for this classroom snapshot, the observer should move instantly into the teacher or target student observation described below.

At the beginning of the third minute of the observation (the second minute of the 8-minute observation block, unless most of a minute remains from the classroom snapshot), the observer shifts focus to the teacher and completes the "Ongoing Activities of Teacher" segment of the coding box (see "COF Activity Code Definitions").

The observer codes the activity being completed by the teacher and then codes the number of minutes this activity takes place. If the activity changes before the end of the 8-minute block, then the second set of activity codes are utilized in the same coding block, along with the number of minutes. This continues until the end of the first 8-minute block. (If more than six different activities occur for the teacher during the block, the additional activities are not coded.)

NOTE: Depending on how long it takes you to code the "L" part of the page, you will have either seven or eight minutes to code activities per page.

Beginning with the second 8-minute block, the observer again completes the Class Snapshot segment. After the first minute, the observer then focuses on the target student (selected at the beginning of the observation period) and codes the "Ongoing Activities of Target Student" segment of the coding box for the remaining seven (or eight) minutes of the block.

For each of the remaining five 8-minute blocks, the observer again completes the "Class Snapshot" segment during the first minute. Then, for coding the activities, the focus switches back and forth between teacher and target student. This results in four of the 8-minute blocks focusing on the teacher and three of the 8-minute blocks focusing on the target student.

At the conclusion of an observation (after coding the seven 8-minute blocks), the observer completes three additional forms: the QAIT, the SPC, and the CERC. These instruments are located behind the COF in each SSOS-R packet.

**Each observation should consist of no more than 60 minutes:** the one minute of preliminary coding and selecting a target student, the seven 8-minute blocks, and three minutes at the conclusion for completing the QAIT, the SPC, and the CERC. If you do not have enough time in the three minutes to complete all three forms, it is most important while you're in the classroom to complete the CERC. The QAIT and SPC could be finished after the observation, if necessary. (Depending on the activities taking place in the classroom during the observation, it may be possible to code some of this material during "down" time, i.e., if a particular activity is taking place for an extended period of time.)

If the subject area changes within an observation, then the data collector should select the additional relevant subjects on the SSOS-R Cover Page.

**Each observation should consist of a minimum of 45 minutes--this is critical.** If for some reason your observation of a particular class is less than 45 minutes (target student departs from room for an extended period of time, a pep rally begins, fire drill, etc.), then that observation would not count and you should re-schedule another to take its place. If the class (subject) you are observing is less than 45 minutes, try to observe the next subject being taught, as long as the target student and teacher remain the same. If the target student changes to a different classroom, end the observation.

## COF STUDENT ENGAGEMENT DEFINITIONS\*

**On-task:** Students are complying with whatever tasks or activities the teacher has assigned. Students in this category are either writing, reading, listening, answering questions, talking with the teacher about their work, or otherwise doing what they are supposed to be doing. The observer is reasonably sure that the student is appropriately engaged.

**Off-task:** Students are not engaged in the tasks they are supposed to be accomplishing. They may be wandering around the room, talking to friends, minding someone else's business, staring into space, in time out, etc. Or they are engaged in tasks with no clear academic focus, such as a lively teacher-led discussion of a recent football game. If the observer has significant doubt as to whether a student is on-task, the student should be coded as off-task.

**Waiting time:** Students classified in this category have finished what they are supposed to be doing and are waiting for the next assignment. They would not be coded as off-task in this instance because there is no specific task assigned. If students are coded as waiting, they **MUST** be coded as social/uninvolved on the bottom of the "snapshot" section.

**Out of room:** The number of students, originally noted in the first classroom count, who are out of the classroom for whatever reason (called to office, restroom, in another classroom, left early, etc.) when the count is taken again. If students are coded as out of room, **DO NOT** include them in any group on the bottom of the "snapshot" section.

NOTE: If there are no students in a particular category (i.e., no students out of room), please bubble in both zeros in that category.

---

\*Adapted from: Schaffer, E. C., Nesselrodt, P. S., & Stringfield, S. C. (1995). Contributions of classroom observation to school effectiveness research. *Special Strategies Observation System: Research edition*. Baltimore, MD: Johns Hopkins University.

## COF GROUPS AND ACTIVITIES DEFINITIONS\*

The Groups and Activities section creates a picture of all the adults and students interacting in the classroom at the time of the Class Snapshot (the first minute of each 8-minute observation block). This section examines the grouping patterns of the classroom during that one-minute period. The observer notes the number of students working with the teacher and the task they are undertaking. Aide-directed groups, student groups, and individual students are noted as well as their activities. The teacher should always be coded unless he/she is out of the room.

The intent of this section is to record as accurately as possible the grouping and activities in the classroom when the Student Engagement rates are recorded (the other section of the Class Snapshot). The most accurate portrayal of the classroom is essential.

The coding process begins by determining what the teacher is doing in the classroom. For example, if the teacher is lecturing to the entire class of 30, the coding would look like the following:

Teacher: Task I 30 students.

This describes a teacher leading or directing a classroom with all students participating or listening.

---

\*Adapted from: Schaffer, E. C., Nesselrodt, P. S., & Stringfield, S. C. (1995). Contributions of classroom observation to school effectiveness research. *Special Strategies Observation System: Research edition*. Baltimore, MD: Johns Hopkins University.

There are options for four different groupings in this section, as follows:

- *Teacher*: Head teacher in the room. The person with final authority on instructional and management decisions.
- *Aide*: Assistant teacher, student teacher, guest lecturer, or volunteer. A person with instructional or management responsibility under the direction of the teacher.
- *Student*: A student acting as a leader of the class or a small group, or individual students working independently. Note: There are two blocks for student groupings, so that two separate student groupings can be coded simultaneously.

There are four different task codes in this section, as follows:

- *Interactions*: Includes content-related interactive activities such as lecture, discussion, recitation activity, or student groups, as well as movies or instruction through computers.
- *Work alone*: Indicates that a student, aide, or the teacher is working on content activity individually.
- *Management/direction*: Indicates that the teacher, aide, or student monitors, manages, listens to, gives directions, or teaches procedures related to routines or non-content-related activities.
- *Social or uninvolved*: Describes the teacher, aide, or students as uninvolved in the content-related class academics or managing work.

The number of students segment is to code the number of students who are involved in the activity, including any student who might be leading a group.

NOTE: The number of students coded in this section may or may not match with the Student Engagement numbers (the other part of the Class Snapshot). This could be due to several factors: (1) the Groups and Activities section does not include the students who are out of the room and (2) the Groups and Activities section can only account for up to four different groupings in the classroom at one time.

Following are several examples of classroom coding scenarios.

**Example 1:**

The classroom is located in a round room with windows that wrap around the room and a double door that opens onto the playground. The classroom has no focal point, rather there are reading areas, 40 to 50 individual activity centers, and animals and fish located at eye level of the 30 four- and five-year-olds that inhabit the classroom. In one area of the room near the doors, the teacher is sitting on the floor facing six children who are watching the teacher present a lesson on mathematics using poker chips and a number board. In the middle of the room, the aide, who is standing on a chair, points to the earth in a model of the solar system, while 10 students sit on the floor looking up at the scene. In the area by the door, eight students are working on individual art projects with small torn pieces of tissue paper glued to clear sheets of plastic. The results are beginning to look like stain glass. The final group of students is gathered around one student in the reading area. Here, a five-year-old student sitting on a rocking chair, reads to the remaining five students. The Groups and Activities codes would look like the following:

Teacher:	Task I	6
Aide:	Task I	10
Student:	Task W	8
Student:	Task I	6 (includes the student leader)

**Example 2:**

The teacher is working on paperwork while students are working on individual assignments:

Teacher:	Task W	0
Student:	Task W	30

### Example 3:

The teacher is monitoring students working alone and is not watching anyone in particular:

Teacher:	Task M	0
Student:	Task W	30

### Example 4:

The teacher is managing no one in particular, the students are working on academic projects or working alone on academic work:

Teacher:	Task M	0
Student:	Task I	5 (this smallest group would not show on the form)
Student:	Task I	6
Student:	Task W	19

Note: In this particular instance, the observer would be able to code only two of the three student groupings, and should select the two largest groups.

### Example 5:

The teacher is teaching eight students in a small group, the aide is marking papers, the first student group (with eight students) is working on ditto sheets. The next student group is practicing a play, and the final student group is not involved in an academic activity.

Teacher:	Task I	8
Aide:	Task W	0
Student:	Task W	8
Student:	Task I	10
Student:	Task S	4 (this smallest group would not show on the form)

Note: In this particular instance, the observer would be able to code only two of the three student groupings, and should select the two largest groups.

## COF ACTIVITY CODE DEFINITIONS\*

The laminated sheet of activity codes (coding key) lists 17 teacher and student activities and 11 student-specific activities. The definitions are provided below.

### Teacher and Student Codes

**A: *Teacher presentation of content:*** Teacher is presenting academic content to the whole class. Includes lecture, demonstration, explanation of academic content, and content-related movies or videos. It may also include some questioning or comments from students, but the main function of this activity is informing students, introducing new materials, or explaining new material, including previously-introduced material. (May include guest speakers.)

**B: *Recitation or discussion:*** Teacher is providing students practice of skills or review of material. This category includes questioning of students by the teacher. It might also include short written tasks, as when teachers ask students to work one problem at their desks to assess understanding during a content development activity. This code could also include a content-oriented game or board work, interactive review, and reviewing textbook exercises.

**C: *Directions for assignments:*** Teacher is explaining to the class the exact procedures for doing an assignment, seatwork activity, or homework. This can include headings, numbering, or any information about the form in which the assignment is to be done.

**D: *Small-group instruction:*** Teacher works with a group of students (two or more) on content-related material.

**E: *Tests:*** Students work independently on a test, quiz, readiness test, or assessment or teacher may read questions aloud, as in a spelling test.

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\*Adapted from: Schaffer, E. C., Nesselrodt, P. S., & Stringfield, S. C. (1995). Contributions of classroom observation to school effectiveness research. *Special Strategies Observation System: Research edition*. Baltimore, MD: Johns Hopkins University.

***F: Checking:*** The teacher and students are going over seatwork problems, a quiz, or assignment for the purpose of checking/grading it in class. Little or no teacher explanation or review is entailed. The teacher or students announce answers or write them on the board or overhead transparency.

***G: Procedural or behavioral presentation:*** The teacher presents or reviews classroom or school procedures or rules. This code should be used any time the teacher institutes and explains classroom procedures or rules governing student behavior. It should also be used when the teacher gives the class extensive feedback on their behavior, or discusses problems relating to student behavior while in school, or students' following of classroom procedures.

***H: Administrative routines:*** Teacher or student is checking attendance, making announcements, opening or closing routines without academic content, discussing grades, distributing graded papers, recording grades in class, or changing seating.

***I: Transitions:*** The teacher and students are involved in activities that entail changing from one activity to another. Examples include moving between small groups, getting supplies or materials for a different activity, passing papers, and waiting for everyone to get ready, to get quiet, or to find the place.

***J: Nonacademic activity:*** Teacher involved with students in activities such as games, discussions, or television that are not related to content of the class.

***K: Discipline:*** Students are involved in some discipline for misbehavior. For example, the teacher may require students to put their heads down on desks for a period of time if they have been too disruptive.

***L: Praising class:*** The teacher is praising one or more students for work or tests completed, for behavior, etc.

***M: Monitoring:*** The teacher is moving around the room giving feedback to individual students or groups, or is providing feedback during individual or group student presentations.

***N: Not occupied:*** Teacher or students are not engaged in academic learning, neither are they involved in any type of nonacademic activity, i.e., just sitting at desk, etc.

*O: Off task:* Teacher is involved in a nonacademic activity, i.e., talking to another teacher, talking on the phone, etc. Students are not doing whatever they were instructed to do, i.e., they are "goofing off," talking to a classmate, "doodling," etc.

*P: Out of room:* Teacher or students have left the room for some reason, such as going to restroom, going to some type of pull-out program, going home sick, etc.

*Q: Individual Instruction:* Teacher works with an individual student on content-related material.

### **Student-Specific Codes**

*R: Waiting time:* Students have no assigned task. Either they are finished and have no other assignment or they are just waiting for the next activity.

*S: Individual seatwork:* Students are working at desks individually. This code includes activities that are content-centered. Brief directions for seatwork or short teacher interruptions of seatwork to explain or clarify directions would be left in seatwork time unless they last at least one minute.

*T: Individual seatwork at computer:* Students are working at computers individually. This code includes activities that are content-centered. Brief directions or short teacher interruptions to explain or clarify directions would not be coded unless they last at least one minute.

*U: Pairs or group seatwork:* Students are involved in content-centered student-initiated group projects or small-group tasks.

*V: Pairs or group seatwork at computer:* Students are grouped in pairs or groups at computers and are performing content-centered activities.

*W: Sustained writing or composition:* Students are involved in sustained writing.

*X: Sustained reading:* Students are involved in sustained reading.

*Y: Hands-on learning:* Individual students or groups are using manipulatives to enhance learning, including experiments.

*Z: Independent inquiry or research:* Students are working individually or in groups to conduct research for a unique product.

*#: Student-initiated questions:* Individual students generate in-depth (higher order) questions for the teacher.

*!: Student presentations:* Students are involved individually or as a group delivering content to the class.

2nd minute of observation should begin at: \_\_\_\_\_:

Class Snapshot 2nd minute of observation	Ongoing Activities of Teacher	
	Activity Code	Time Spent on Activity
<p><i>Student Engagement:</i></p> <p>Number of students on task:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students off task:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students out of room:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students waiting:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p>	<p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p>	<p>1 2 3 4 5 6 7 8</p>

*Groups and Activities:*

	Task	Number of Students		Task	Number of Students
Tchr.	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9
		0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9
Aide	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9
		0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9

Class Snapshot 10th minute of observation	Ongoing Activities of Target Student	
	Activity Code	Time Spent on Activity
<p><i>Student Engagement:</i></p> <p>Number of students on task:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students off task:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students out of room:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>Number of students waiting:</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p>	<p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # I</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # I</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # I</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # I</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # I</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # I</p>	<p>1 2 3 4 5 6 7 8</p>

*Groups and Activities:*

	Task	Number of Students		Task	Number of Students
Tchr.	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9
		0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9
Aide	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9
		0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9

Class Snapshot 18th minute of observation	Ongoing Activities of Teacher																																																																																																																																																																																																																																																																																													
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Adapted from Nesselrodt & Schaffer 2000. Machine Scannable Version © AEL 2004.

34th minute of observation should begin at: \_\_\_\_\_:

<b>Class Snapshot</b> <b>34th minute of observation</b>	<b>Ongoing Activities of Teacher</b>																																																																																																																																																																																					
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42nd minute of observation should begin at: \_\_\_\_\_:\_\_\_\_\_

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Adapted from Nesselrodt & Schaffer 2000. Machine Scannable Version © AEL 2004.

50th minute of observation should begin at: \_\_\_\_\_:\_\_\_\_\_

<b>Class Snapshot</b> <b>50th minute of observation</b>	<b>Ongoing Activities of Teacher</b>																															
	<b>Activity Code</b>	<b>Time Spent on Activity</b>																														
<p><i>Student Engagement:</i></p> <p><b>Number of students on task:</b></p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p><b>Number of students off task:</b></p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p><b>Number of students out of room:</b></p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p> <p><b>Number of students waiting:</b></p> <p>0 1 2 3 4 5 6 7 8 9</p> <p>0 1 2 3 4 5 6 7 8 9</p>	<p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p> <p>A B C D E F G H I J K L M N</p> <p>O P Q R S T U V W X Y Z # !</p>	<p>1 2 3 4 5 6 7 8</p>																														
<p><i>Groups and Activities:</i></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 15%; text-align: center;">Task</th> <th style="width: 35%; text-align: center;">Number of Students</th> <th style="width: 10%;"></th> <th style="width: 15%; text-align: center;">Task</th> <th style="width: 35%; text-align: center;">Number of Students</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Tchr.</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td style="vertical-align: top;">Stds.</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> <tr> <td style="vertical-align: top;">Aide</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td style="vertical-align: top;">Stds.</td> <td style="text-align: center;">I W M S</td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> <td></td> <td></td> <td style="text-align: center;">0 1 2 3 4 5 6 7 8 9</td> </tr> </tbody> </table>				Task	Number of Students		Task	Number of Students	Tchr.	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9	Aide	I W M S	0 1 2 3 4 5 6 7 8 9	Stds.	I W M S	0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9			0 1 2 3 4 5 6 7 8 9
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## COF SNAPSHOT EXERCISES

1. Second grade reading class. Teacher sitting at small table with 5 children using phonics chart to practice long vowel patterns. Aide going from desk to desk monitoring 14 children who are working on workbook pages.

Students on-task _____	Students off-task _____	Students out of room _____	Students waiting _____
Task	# Students	Task	# Students
Teacher	I W M S _____	Students	I W M S _____
Aide	I W M S _____	Students	I W M S _____

2. Seventh grade science class. Teacher demonstrating use of digital scale which will be used in science experiment later in the class period. 17 students. High school student in back of room setting up work stations for experiment.

Students on-task _____	Students off-task _____	Students out of room _____	Students waiting _____
Task	# Students	Task	# Students
Teacher	I W M S _____	Students	I W M S _____
Aide	I W M S _____	Students	I W M S _____

3. First grade social studies class. 19 students. Aide counting lunch money at back of room. Teacher using map at front of room explaining Kentucky's placement within United States. Children come up one at a time to point to Kentucky, West Virginia, Ohio, and other bordering states.

Students on-task _____	Students off-task _____	Students out of room _____	Students waiting _____
Task	# Students	Task	# Students
Teacher	I W M S _____	Students	I W M S _____
Aide	I W M S _____	Students	I W M S _____

4. Algebra class. 6 students at board working problems. 6 students at desks working on same problems. Teacher completing absence record for office.

Students on-task _____	Students off-task _____	Students out of room _____	Students waiting _____
Task	# Students	Task	# Students
Teacher	I W M S _____	Students	I W M S _____
Aide	I W M S _____	Students	I W M S _____

5. High school Appalachian History class. Students researching population patterns using web sites. Teacher working with 2 students at one computer. Total students in class = 13.

Students on-task _____	Students off-task _____	Students out of room _____	Students waiting _____
Task	# Students	Task	# Students
Teacher	I W M S _____	Students	I W M S _____
Aide	I W M S _____	Students	I W M S _____

6. Eighth grade English class. 23 students. Students working in small groups to edit each other's compositions. Teacher moving from group to group.

<b>Students on-task</b> _____	<b>Students off-task</b> _____	<b>Students out of room</b> _____	<b>Students waiting</b> _____
<b>Task</b>	<b># Students</b>	<b>Task</b>	<b># Students</b>
<b>Teacher</b> I W M S _____		<b>Students</b> I W M S _____	
<b>Aide</b> I W M S _____		<b>Students</b> I W M S _____	

7. Physics class. 19 students. Teacher demonstrating use of graphing calculator to help solve problems. Lab assistant cutting strips of paper to be used with upcoming experiment.

<b>Students on-task</b> _____	<b>Students off-task</b> _____	<b>Students out of room</b> _____	<b>Students waiting</b> _____
<b>Task</b>	<b># Students</b>	<b>Task</b>	<b># Students</b>
<b>Teacher</b> I W M S _____		<b>Students</b> I W M S _____	
<b>Aide</b> I W M S _____		<b>Students</b> I W M S _____	

8. Third grade reading class. 22 students. Students taking test. One student already finished, pencil down, reading book. One student at teacher's desk asking question. Two students finished test looking out window.

<b>Students on-task</b> _____	<b>Students off-task</b> _____	<b>Students out of room</b> _____	<b>Students waiting</b> _____
<b>Task</b>	<b># Students</b>	<b>Task</b>	<b># Students</b>
<b>Teacher</b> I W M S _____		<b>Students</b> I W M S _____	
<b>Aide</b> I W M S _____		<b>Students</b> I W M S _____	

9. Spanish II class. 18 students. Teacher using textbook exercises with students. One student sleeping.

<b>Students on-task</b> _____	<b>Students off-task</b> _____	<b>Students out of room</b> _____	<b>Students waiting</b> _____
<b>Task</b>	<b># Students</b>	<b>Task</b>	<b># Students</b>
<b>Teacher</b> I W M S _____		<b>Students</b> I W M S _____	
<b>Aide</b> I W M S _____		<b>Students</b> I W M S _____	

10. Biology class. 15 students. Students drawing large circles on white paper with ballpoint pens and observing termites' behavior. Teacher handing out data collection sheets to students.

<b>Students on-task</b> _____	<b>Students off-task</b> _____	<b>Students out of room</b> _____	<b>Students waiting</b> _____
<b>Task</b>	<b># Students</b>	<b>Task</b>	<b># Students</b>
<b>Teacher</b> I W M S _____		<b>Students</b> I W M S _____	
<b>Aide</b> I W M S _____		<b>Students</b> I W M S _____	

11. Junior English class. 19 students. Students watching video on Mark Twain. Teacher out of room. 2 students talking. 1 student reading book. 1 student referring to a textbook and writing.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

12. First grade math class. 20 students. Students on floor using rulers to measure various objects. Teacher calling out directions.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

13. Third grade social studies class. 24 students. Teacher sitting on stool at front of room. 4 students at listening center completing worksheets. 8 students sitting on floor surrounding teacher taking turns reading aloud. 10 students working at desks on assignment. 1 student in time-out corner. 1 student in restroom.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

14. Second grade language arts class. 18 students. Teacher demonstrating cursive writing at blackboard. Students watching, pencils on desk. Aide working with 3 children at table in back of room. One child head down due to illness.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

15. First grade spelling class. 18 students. Teacher administering spelling test.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

16. Second grade science class. 19 students. Teacher discussing upcoming field trip to local park.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

17. Chemistry class. 20 students. 7 students taking make-up test. Teacher working with 4 students on an experiment. 7 students working in 2 groups using graphing calculators to plot data from their completed experiments. 2 students using computers to update class website.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

18. Eighth grade prealgebra class. 27 students. Teacher reviewing quiz problems with the students.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

19. Sixth grade health class. 22 students. 10 students working in pairs to research nutritional information about fruits and vegetables. Remaining students in pairs researching nutritional information about potato chips, candy bars, and other types of junk food. Teacher walking around monitoring.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

20. United States history class. 25 students. Guest speaker lecturing. Teacher is watching over students' behavior.

Students on-task _____		Students off-task _____	Students out of room _____		Students waiting _____
	Task	# Students		Task	# Students
Teacher	I W M S	_____	Students	I W M S	_____
Aide	I W M S	_____	Students	I W M S	_____

## COF ONGOING ACTIVITIES OF TEACHER OR TARGET STUDENT

1. Second grade reading class. Teacher sitting at small table with 5 children using phonics chart to practice long vowel patterns. Aide going from desk to desk monitoring 14 children who are working on workbook pages. **Target student is in group with teacher. TIME: 10:03**

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

2. Seventh grade science class. **Teacher demonstrating use of digital scale which will be used in science experiment later in the class period.** 17 students. High school student in back of room setting up work stations for experiment. **TIME: 1:15**

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

3. First grade social studies class. 19 students. Aide counting lunch money at back of room. Teacher using map at front of room explaining Kentucky's placement within United States. Children come up one at a time to point to Kentucky, West Virginia, Ohio, and other bordering states. **Target student is eagerly awaiting his turn. TIME: 8:13**

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

4. Algebra class. 6 students at board working problems. 6 students at desks working on same problems. **Teacher completing absence record for office. TIME: 9:04**

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

5. High school Appalachian History class. Students researching population patterns using web sites. Teacher working with 2 students at one computer. Total students in class = 13. **Target student is working with teacher and another student at computer. TIME: 9:45**

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

6. Eighth grade English class. 23 students. Students working in small groups to edit each other's compositions. **Teacher moving from group to group. TIME: 11:15**

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

7. Physics class. 19 students. Teacher demonstrating use of graphing calculator to help solve problems. Lab assistant cutting strips of paper to be used with upcoming experiment. **Target student is asking questions of teacher. TIME: 12:11**

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

8. Third grade reading class. 22 students. Students taking test. One student already finished, pencil down, reading book. **One student at teacher's desk asking question.** Two students finished test looking out window. **TIME: 8:54**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

9. Spanish II class. 18 students. Teacher using textbook exercises with students. One student sleeping. **Target student is involved in lesson.** **TIME: 10:46**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

10. Biology class. 15 students. Students drawing large circles on white paper with ballpoint pens and observing termites' behavior. **Teacher handing out data collection sheets to students.** **TIME: 8:52**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

11. Junior English class. 19 students. Students watching video on Mark Twain. Teacher out of room. 2 students talking. 1 student reading book. 1 student referring to a textbook and writing. **Target student is using textbook and writing.** **TIME: 2:15**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

12. First grade math class. 20 students. Students on floor using rulers to measure various objects. **Teacher calling out directions.** **TIME: 9:23**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

13. Third grade social studies class. 24 students. Teacher sitting on stool at front of room. 4 students at listening center completing worksheets. 8 students sitting on floor surrounding teacher taking turns reading aloud. 10 students working at desks on assignment. 1 student in time-out corner. 1 student in restroom. **Target student is in time-out corner.** **TIME: 10:16**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

14. Second grade language arts class. 18 students. **Teacher demonstrating cursive writing at blackboard.** Students watching, pencils on desk. Aide working with 3 children at table in back of room. One child head down due to illness. **TIME: 1:43**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

15. First grade spelling class. 18 students. Teacher administering spelling test. **Target student is taking test. TIME: 2:22**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

16. Second grade science class. 19 students. Teacher discussing upcoming field trip to local park. **TIME: 2:38**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

17. Chemistry class. 20 students. 7 students taking make-up test. Teacher working with 4 students on an experiment. 7 students working in 2 groups using graphing calculators to plot data from their completed experiments. 2 students using computers to update class website. **Target student is working on website. TIME: 1:15**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

18. Eighth grade prealgebra class. 27 students. Teacher reviewing quiz problems with the students. **TIME: 8:23**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

19. Sixth grade health class. 22 students. 10 students working in pairs to research nutritional information about fruits and vegetables. Remaining students in pairs researching nutritional information about potato chips, candy bars, and other types of junk food. Teacher walking around monitoring. **Target student is saying how much she'd enjoy a Coke and a Snickers right about now. TIME: 9:02**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

20. United States history class. 25 students. Guest speaker lecturing. Teacher is watching over students' behavior. **TIME: 1:24**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

## COF CONTINUING ACTIVITIES OF TEACHER OR TARGET STUDENT

1. Second grade reading class. Teacher sitting at small table with 5 children using phonics chart to practice long vowel patterns. Aide going from desk to desk monitoring 14 children who are working on workbook pages. **Target student is in group with teacher. TIME: 10:03 Time spent on activity: \_\_\_\_\_**

*Target student goes back to desk to work on workbook pages. TIME: 10:08*

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

2. Seventh grade science class. **Teacher demonstrating use of digital scale that will be used in science experiment later in the class.** 17 students. High school student in back of room setting up work stations for experiment. **TIME: 1:15 Time spent on activity: \_\_\_\_\_**

*Teacher begins assigning pairs of students for the science experiment. TIME: 1:20*

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

3. First grade social studies class. 19 students. Aide counting lunch money at back of room. Teacher using map at front of room explaining Kentucky's placement within United States. Children come up one at a time to point to Kentucky, West Virginia, Ohio, and other bordering states. **Target student is eagerly awaiting his turn. TIME: 8:13 Time spent on activity: \_\_\_\_\_**

*Target student is corrected by teacher for talking out of turn. TIME: 8:17*

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

4. Algebra class. 6 students at board working problems. 6 students at desks working on same problems. **Teacher completing absence record for office. TIME: 9:04 Time spent on activity: \_\_\_\_\_**

*Teacher works with students at board to check/correct their answers. TIME: 9:06*

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

5. High school Appalachian History class. Students researching population patterns using web sites. Teacher working with 2 students at one computer. Total students in class = 13. **Target student is working with teacher and another student at computer. TIME: 9:45 Time spent on activity: \_\_\_\_\_**

*Teacher leaves target student to work with other students. TIME: 9:52.*

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

6. Eighth grade English class. 23 students.. Students working in small groups to edit each other's compositions. **Teacher moving from group to group. TIME: 11:15 Time spent on activity: \_\_\_\_\_**

*Teacher stops and works with a specific student group. TIME: 11:18*

**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

7. Physics class. 19 students. Teacher demonstrating use of graphing calculator to help solve problems. Lab assistant cutting strips of paper to be used with upcoming experiment. **Target student is asking questions of teacher. TIME: 12:11 Time spent on activity: \_\_\_\_\_**

*Target student uses the graphing calculator to answer textbooks problems. TIME: 12:17*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

8. Third grade reading class. 22 students. Students taking test. One student already finished - pencil down - reading book. **One student at teacher's desk asking question.** Two students finished test, looking out window. **TIME: 8:54 Time spent on activity: \_\_\_\_\_**

*Teacher collects tests and asks students to get out their math books. TIME: 9:00*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

9. Spanish II class. 18 students. Teacher using textbook exercises with students. One student sleeping. **Target student is involved in lesson. TIME: 10:46 Time spent on activity: \_\_\_\_\_**

*Target student leaves the room. TIME: 10:52*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

10. Biology class. 15 students. Students drawing large circles on white paper with ballpoint pens and observing termites' behavior. **Teacher handing out data collection sheets to students. TIME: 8:52 Time spent on activity: \_\_\_\_\_**

*Teacher assigns a one-page essay as punishment for students releasing their termites. TIME: 8:57*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

11. Junior English class. 19 students. Students watching video on Mark Twain. Teacher out of room. 2 students talking. 1 student reading book. 1 student referring to a textbook and writing. **Target student is using textbook and writing. TIME: 2:15 Time spent on activity: \_\_\_\_\_**

*Target student starts watching video. TIME: 2:22*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

12. First grade math class. 20 students. Students on floor using rulers to measure various objects. **Teacher calling out directions. TIME: 9:23 Time spent on activity: \_\_\_\_\_**

*Teacher moves around classroom, seeing what students are measuring. TIME: 9:27*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z # !**

13. Third grade social studies class. 24 students. Teacher sitting on stool at front of room. 4 students at listening center completing worksheets. 8 students sitting on floor surrounding teacher taking turns reading aloud. 10 students working at desks on assignment. 1 student in time-out corner. 1 student in restroom. **Target student is in time-out corner. TIME: 10:16 Time spent on activity: \_\_\_\_\_**

*Target student comes out of time-out corner and asks for permission to go to restroom. TIME: 10:20*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

14. Second grade language arts class. 18 students. **Teacher demonstrating cursive writing at blackboard.** Students watching, pencils on desk. Aide working with 3 children at table in back of room. One child head down due to illness. **TIME: 1:43 Time spent on activity: \_\_\_\_\_**

*Teacher begins telling students about the upcoming state fair. TIME: 1:50*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

15. First grade spelling class. 18 students. Teacher administering spelling test. **Target student is taking test. TIME: 2:22 Time spent on activity: \_\_\_\_\_**

*Target student is asked to collect papers in his row. TIME: 2:25*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

16. Second grade science class. 19 students. **Teacher discussing upcoming field trip to local park. TIME: 2:38 Time spent on activity: \_\_\_\_\_**

*Teacher reviews safety procedures for field trips. TIME: 2:39*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

17. Chemistry class. 20 students. 7 students taking make-up test. Teacher working with 4 students on an experiment. 7 students working in 2 groups using graphing calculators to plot data from their completed experiments. 2 students using computer to update class website. **Target student is working on website. TIME: 1:15 Time spent on activity: \_\_\_\_\_**

*Target student and partner suddenly fall off chairs. TIME: 1:19*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

18. Eighth grade prealgebra class. 27 students. **Teacher reviewing quiz problems with the students. TIME: 8:23 Time spent on activity: \_\_\_\_\_**

*Teacher complements class for being so attentive to quiz review. TIME: 8:26*  
**T and S: A B C D E F G H I J K L M N O P Q Student-Specific: R S T U V W X Y Z #!**

19. Sixth grade health class. 22 students. 10 students working in pairs to research nutritional information about fruits and vegetables. Remaining students in pairs researching nutritional information about potato chips, candy bars, and other types of junk food. Teacher walking around monitoring. **Target student is saying how much she'd enjoy a Coke and a Snickers right about now.** **TIME: 9:02** Time spent on activity: \_\_\_\_\_

*Teacher asks target student to step into hall with her.* **TIME: 9:03**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

20. United States history class. 25 students. Guest speaker lecturing. **Teacher is watching over students' behavior.** **TIME: 1:24** Time spent on activity: \_\_\_\_\_

*Teacher engages students in asking questions of guest lecturer.* **TIME: 1:27**

**T and S:** A B C D E F G H I J K L M N O P Q **Student-Specific:** R S T U V W X Y Z # !

## HOMEWORK ASSIGNMENT

Please use the following information to complete the SSOS-R Cover Page and the first 8-minute block of observation.

School Name: E

Teacher: Mrs. Smith (#6)

There are 24 students in Mrs. Smith's 6<sup>th</sup> grade math class. Today there is also a student teacher in the room observing Mrs. Smith's lesson.

### Class Snapshot ("L")

Twenty-one of the students are sitting at their desks and listening as Mrs. Smith is making morning announcements. One student is excused to go to his locker to retrieve his homework and 2 students in the back row of the room are talking to each other and giggling.

### Ongoing Activities of Teacher

- 9:00 Mrs. Smith is making opening announcements and distributing graded tests taken the previous day.
- 9:02 Mrs. Smith is instructing the students to get out their math books and asking them to turn to a specific page and to also get out their homework from the previous evening.
- 9:03 Mrs. Smith is reviewing the answers to the homework sheet. She is having volunteers to put the problems on the board so the class can review how the problems were solved.
- 9:07 Mrs. Smith is starting a new lesson on multiplication. Students are actively listening as she is teaching.

Section 6:

QAIT Instructions

## QAIT INSTRUCTIONS AND DEFINITIONS\*

This instrument is completed at the end of each classroom observation. A QAIT form is attached to the back of each SSOS-R packet, following the COF coding forms.

### **Quality of Instruction:**

The degree to which information or skills are presented so that students can easily learn them. Quality of instruction is largely a product of the quality of the curriculum and of the lesson presentation itself.

1. Lessons make sense to students. The teacher:
  - a. *Organizes information in an orderly way:* Teacher presents content in logical order and includes all necessary steps to assist student understanding.
  - b. *Notes transitions to new topics:* Teacher uses verbal markers such as "the next point" or "first," "second," etc., to indicate that he/she is moving to a different area of information in the lesson.
  - c. *Uses many vivid images and examples:* Teacher depicts a scene using language that creates a concrete impression for the student. Or, teacher describes instances in which a rule or tenet would be true.
  - d. *Frequently restates essential principles:* Teacher repeats an overriding theme or a critical point he/she is making throughout the explanation of it.

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\*Adapted from: Schaffer, E. C., Nesselrodt, P. S., & Stringfield, S. C. (1995). Contributions of classroom observation to school effectiveness research. *Special Strategies Observation System: Research edition*. Baltimore, MD: Johns Hopkins University.

2. Lessons relate to students' background. The teacher:
  - a. *Uses devices such as advanced organizers:* Teacher describes a familiar scene that parallels concepts from the lesson. Or, teacher uses visual representations of the concepts from the lesson that depict the relationships among those concepts.
  - b. *Reminds students of previously learned materials:* Teacher describes the relationship of points in a current lesson to those the class has had before.
3. *The teacher exhibits enthusiasm:* Teacher shows his/her own enjoyment of the content and task.
4. *The teacher shows a sense of humor:* Teacher makes jokes that are not aimed at students in a sarcastic manner. Or, teacher laughs at own mistakes.
5. Lesson objectives are clearly specified. The teacher:
  - a. *States lesson objectives orally or in writing:* Students are told what they are to learn and perhaps why.
  - b. *Conducts formal and/or informal assessment:* Teacher gives a test/quiz or other kind of task that will be graded. Or, teacher monitors and reviews students' work. Or, teacher checks for students' understanding frequently throughout lesson (e.g., "any questions?").
  - c. *Provides immediate and corrective feedback:* Teacher immediately tells students whether a response is right or wrong. Teacher may build on students' responses to strengthen understanding.
6. *Teachers use an appropriate pace to cover content:* Teacher covers content at a rapid pace without going so fast that students are unable to keep up and understand. The pace is consistent to the task and its complexity, i.e., for lessons checking memorization of times tables, the pace should be lively.

**Appropriate Level of Instruction:**

The degree to which the teacher makes sure that students are ready to learn a new lesson (i.e., they have the necessary skills and knowledge to learn it) but have not already learned the lesson. In other words, the level of instruction is appropriate when a lesson is neither too difficult nor too easy for students.

7. Instructional strategies match students' abilities. The teacher:
  - a. *Accommodates students' levels of prior knowledge:* Teacher differentiates instruction as necessary for students who have the prerequisite skills to perform tasks or understand concepts and for those who do not. Provides instruction in prerequisite skills for those who do not have them.
  - b. *Accommodates students' different learning rates:* Teacher moves those students who have mastered a skill or concept on to the next level while providing additional time and practice for those who need it.
  
8. Grouping strategies enable students to work together or alone: The teacher:
  - a. *Uses in-class ability grouping:* Within the classroom, the teacher groups students according to their abilities—i.e., reading groups for high, medium, and low ability readers.
  - b. *Has a class that is homogeneous in ability:* The school has grouped the students at a particular grade level into high, medium, and low ability classes.
  - c. *Uses cooperative learning arrangements:* Students work in small heterogeneous groups to complete projects and/or to learn content.
  - d. *Bases individual instruction on mastery of skills and/or concepts:* Students move at their own pace through a set of materials and instructional activities until each masters the objectives of the unit. As an individual student masters the objectives, he/she moves to the next unit without waiting for the rest of the class.
  - e. *Uses individualized instruction:* The teacher provides each student with objectives and instructional materials designed to accommodate his/her ability level and educational needs.

**Incentive:**

The degree to which the teacher makes sure that students are motivated to work on instructional tasks and to learn the material being presented.

9. The teacher arouses students' curiosity by:
  - a. *Presenting surprising demonstrations:* Teacher makes a point by using props that may surprise students such as showing an unexpected reaction by mixing two chemicals.
  - b. *Relating topics to students' lives:* Teacher may ask students whether they have ever felt the same as a character in a story they have read or may point out to students how they may use a particular mathematical operation in daily life.
  - c. *Allowing students to discover information:* Teacher presents a problem for the students to solve during which they must uncover information to help them find the solution.
  - d. *Presenting intrinsically interesting material:* The topic presented is one that the students like without any incentive being provided.
  
10. The teacher uses extrinsic academic incentives such as:
  - a. *Praise and feedback:* Teacher tells student that a task was done well and what aspects of the performance made it so.
  - b. *Accountability:* Teacher holds students responsible for completing assignments by asking them to demonstrate skills, hold up products, or answer questions.
  - c. *Homework checks:* Teacher either collects homework for assessment or informally checks on its completion.
  - d. *Waiting for responses:* Teacher provides appropriate time for a student to respond to a question.

- e. *Guiding partial responses:* Teacher probes and prompts a student who does not completely answer a question.
  - f. *Tokens and rewards:* Teacher uses a system of tangible rewards such as tokens that can be collected and "cashed in" for a reward or intangible reward such as privileges.
  - g. *Communicating high expectations:* Teacher let students know that he/she believes that they can perform difficult tasks successfully.
  - h. *Small groups with individual incentives:* Teacher assesses each student individually for some aspects of small-group work.
  - i. *Students encourage one another to achieve:* Students urge each other to try a task or cheer the efforts of their peers.
  - j. *Group contingencies:* Teacher rewards or recognizes a group of students who have worked together to achieve marks on an assignment.
11. The teacher uses extrinsic behavioral incentives such as:
- a. *Praise:* Teacher indicates to students that their behavior has been good and why.
  - b. *Tokens and rewards for improvement:* Teacher gives students (as whole class, groups, or individuals) tangible items or tokens that may be "cashed in" in exchange for another reward when behavior improves or meets the teacher's expectations that have been communicated to the class.
  - c. *Group contingencies:* Teacher promises a reward for a group of students who work together well.
12. The teacher provides instruction that is appropriate for students' abilities.
- a. *Efforts by the student leads to success:* Teacher provides instruction that is not so difficult that students are unable to learn it but that is difficult enough to provide them with a challenge.

**Use of Time:**

The degree to which students are given enough time to learn the material being taught.

## 13. Allocated time.

- a. *Necessary time is allocated for instruction:* The time set aside for presenting a lesson, assessing student understanding, and practice and feedback is sufficient.

## 14. Engaged rates.

- a. *The teacher uses effective management:* Teacher monitors students as they work to ensure that they are on task. Teacher exhibits behaviors that subtly let students know that he/she sees off-task behavior and gets them back on task.

*Students attend to lessons:* A high rate of student on-task behavior occurs during class time

**Project Name:**  
**QAIT\* Assessment of Classroom**

*Please indicate the extent to which the following items were observed by filling in the respective bubbles, using a scale of 1 (Unlike this class) to 5 (Like this class).*

	<i>Unlike this class</i>	<i>Like this class</i>		<i>Unlike this class</i>	<i>Like this class</i>
<b>Quality of Instruction</b>			<b>Quality of Instruction (continued)</b>		
1. Lessons make sense to students. The teacher:			4. The teacher shows a sense of humor.	(1) (2) (3) (4) (5)	
a. Organizes information in an orderly way.	(1) (2) (3) (4) (5)		5. Lesson objectives are clearly specified.		
b. Notes transitions to new topics.	(1) (2) (3) (4) (5)		The teacher:		
c. Uses many vivid images and examples.	(1) (2) (3) (4) (5)		a. States lesson objectives orally or in writing.	(1) (2) (3) (4) (5)	
d. Frequently restates essential principles.	(1) (2) (3) (4) (5)		b. Conducts formal and/or informal assessment.	(1) (2) (3) (4) (5)	
2. Lessons relate to students' background.			c. Provides immediate and corrective feedback.	(1) (2) (3) (4) (5)	
The teacher:			6. Teachers use an appropriate pace to cover content.	(1) (2) (3) (4) (5)	
a. Uses devices such as advanced organizers.	(1) (2) (3) (4) (5)				
b. Reminds students of previously learned materials.	(1) (2) (3) (4) (5)				
3. The teacher exhibits enthusiasm.	(1) (2) (3) (4) (5)				

\*QAIT stands for Quality of Instruction, Appropriate Level of Instruction, Incentives for Learning, and Use of Time.

Continue Ö

*Unlike  
this class*      *Like  
this class*

### Appropriate Level of Instruction

7. Instructional strategies match students' abilities. The teacher:
- a. Accommodates students' levels of prior knowledge.      (1) (2) (3) (4) (5)
  - b. Accommodates students' different learning rates.      (1) (2) (3) (4) (5)
8. Grouping strategies enable students to work together or alone. The teacher:
- a. Uses in-class ability grouping.      (1) (2) (3) (4) (5)
  - b. Has a class that is homogeneous in ability.      (1) (2) (3) (4) (5)
  - c. Uses cooperative learning arrangements.      (1) (2) (3) (4) (5)
  - d. Bases individual instruction on mastery of skills and/or concepts.      (1) (2) (3) (4) (5)
  - e. Uses individualized instruction.      (1) (2) (3) (4) (5)

### Incentives for Learning

9. The teacher arouses students' curiosity by:
- a. Presenting surprising demonstrations.      (1) (2) (3) (4) (5)
  - b. Relating topics to students' lives.      (1) (2) (3) (4) (5)
  - c. Allowing students to discover information.      (1) (2) (3) (4) (5)
  - d. Presenting intrinsically interesting material.      (1) (2) (3) (4) (5)
10. The teacher uses extrinsic academic incentives such as:
- a. Praise and feedback.      (1) (2) (3) (4) (5)
  - b. Accountability.      (1) (2) (3) (4) (5)
  - c. Homework checks.      (1) (2) (3) (4) (5)

*Unlike  
this class*      *Like  
this class*

### Incentives for Learning (continued)

- d. Waiting for responses.      (1) (2) (3) (4) (5)
  - e. Guiding partial responses.      (1) (2) (3) (4) (5)
  - f. Tokens and rewards.      (1) (2) (3) (4) (5)
  - g. Communicating high expectations.      (1) (2) (3) (4) (5)
  - h. Small groups with individual incentives.      (1) (2) (3) (4) (5)
  - i. Students encourage one another to achieve.      (1) (2) (3) (4) (5)
  - j. Group contingencies.      (1) (2) (3) (4) (5)
11. The teacher uses extrinsic behavioral incentives such as:
- a. Praise.      (1) (2) (3) (4) (5)
  - b. Tokens and rewards for improvement.      (1) (2) (3) (4) (5)
  - c. Group contingencies.      (1) (2) (3) (4) (5)
12. The teacher provides instruction that is appropriate for students' abilities:
- a. Efforts by the student lead to success.      (1) (2) (3) (4) (5)

### Use of Time

13. Allocated time:
- a. Necessary time is allocated for instruction.      (1) (2) (3) (4) (5)
14. Engaged rates:
- a. The teacher uses effective management.      (1) (2) (3) (4) (5)
  - b. Students attend to lessons.      (1) (2) (3) (4) (5)

Section 7:

SPC Instructions

# The Standards Performance Continuum (SPC)

## Background

The Standards Performance Continuum (SPC) is a classroom observation rubric that yields a quantifiable measure of the implementation (or not) of the Standards for Effective Pedagogy (Tharp, Estrada, Dalton, & Yamauchi, 2000). Tharp and his associates developed, tested, and published these five standards, which they feel are the most effective strategies for teaching culturally, linguistically, and economically diverse students who may be less successful in school. Basically, the five standards assessed with the SPC observation rubric “emphasize that teaching and learning occur best in joint productive activity involving teachers and students, that is, when experts and novices work together for a common product or goal and during the activity have opportunities to converse about it” (Estrada, p. 122).

There are five standards in the SPC. The first standard is labeled Joint Productive Activity and involves the facilitation of learning by classroom teachers and students working collaboratively on instructional products and dialoguing about the process. The second standard is Language and Literacy Development and involves developing skills in language and literacy of instruction and in the academic disciplines throughout all classroom instructional activities. The third standard, called Contextualization, deals with connecting the curriculum and the teaching of it to the students' lives, experiences, and skills from their home and community as well as from prior knowledge attained in school. The fourth standard, Challenging Activities, deals with challenging students to become engaged in higher order and complex thinking in all subjects. Finally, the fifth standard—Instructional Conversation—involves teaching through conversation by engaging students in purposeful, sustained, subject-matter oriented dialogue.

## Instructions

The SPC classroom observation rubric consists of the five standards, each of which includes five levels of enactment. These five levels of enactment are (a) Not Observed, (b) Emerging, (c) Developing, (d) Enacting, and (e) Integrating. These levels are seen as a continuum of enactment for each of the five standards. There can be two approaches to making the SPC ratings. The first approach is to make initial ratings early in the observation session, then change them upward when new activities justify a higher rating. This is appropriate because the SPC observer is to use the highest level observed for each standard in any single observation period. The second approach is to make the SPC ratings at the end of the observation period, relying on memory or notes to arrive at the appropriate SPC rating. Whichever approach the observer chooses, he/she should fill in the numbered (0 to 4) bubble at the right margin for each SPC standard.

**Project Name:**  
**Standards Performance Continuum (SPC)**

	<b>Not Observed (0)</b>	<b>Emerging (1)</b>	<b>Developing (2)</b>	<b>Enacting (3)</b>	<b>Integrating (4)</b>
<i>General Definition:</i>	<i>The standard is not observed.</i>	<i>One or more elements of the standard are enacted.</i>	<i>The teacher designs and enacts activities that demonstrate a partial enactment of the standard.</i>	<i>The teacher designs, enacts, and assists in activities that demonstrate a complete enactment of the standard.</i>	<i>The teacher designs, enacts, and assists in activities that demonstrate skillful integration of multiple standards simultaneously.</i>
Joint Productive Activity  <i>Teacher and Students Producing Together</i>	<i>Joint Productive Activity is not observed.</i>	Students are seated with a partner or group, AND (a) collaborate or assist one another, OR (b) are instructed in how to work in groups, OR (c) contribute individual work, not requiring collaboration, to a joint product.	The teacher and students collaborate on a joint product in a whole-class setting, OR students collaborate on a joint product in pairs or small groups.	The teacher and a small group of students collaborate on a joint product.	The teacher designs, enacts, and collaborates in joint productive activities that demonstrate skillful integration of multiple standards simultaneously.
Language & Literacy Development  <i>Developing Language and Literacy Across the Curriculum</i>	<i>Language &amp; Literacy Development is not observed.</i>	(a) The teacher explicitly models appropriate language; OR (b) students engage in brief, repetitive, or drill-like reading, writing, or speaking activities; OR (c) students engage in social talk while working.	The teacher provides structured opportunities for academic language development in sustained reading, writing, or speaking activities.	The teacher designs and enacts instructional activities that <i>generate</i> language expression and development of content vocabulary AND <i>assists student language use or literacy development</i> through questioning, rephrasing, or modeling	The teacher designs, enacts, and assists in language development activities that demonstrate skillful integration of multiple standards simultaneously.
Contextualization  <i>Making Meaning - Connecting School to Students' Lives</i>	<i>Contextualization is not observed.</i>	The teacher (a) includes some aspect of students' everyday experience in instruction, OR (b) connects classroom activities by theme or builds on the current unit of instruction, OR (c) includes parents or community members in activities or instruction.	The teacher makes incidental connections between students' prior experience/knowledge from home, school, or community and the new activity/information.	The teacher integrates the new activity/information with what students already know from home, school, or community.	The teacher designs, enacts, and assists in contextualized activities that demonstrate skillful integration of multiple standards simultaneously.

- ① Not observed
  - ② Emerging
  - ③ Developing
  - ④ Enacting
  - ⑤ Integrating
- 
- ① Not observed
  - ② Emerging
  - ③ Developing
  - ④ Enacting
  - ⑤ Integrating
- 
- ① Not observed
  - ② Emerging
  - ③ Developing
  - ④ Enacting
  - ⑤ Integrating

<p>Challenging Activities</p> <p><i>Teaching Complex Thinking</i></p>	<p><i>Challenging Activity</i> is not observed.</p>	<p>The teacher (a) accommodates students' varied ability levels, OR (b) connects student comments to content concepts, OR (c) sets and presents standards for student performance, OR (d) provides students with feedback on their performance.</p>	<p>The teachers designs and enacts activities that connect instructional elements to academic content OR advance student understanding to more complex levels.</p>	<p>The teacher designs and enacts activities that are connected to academic content; assists and uses challenging standards to advance student understanding to more complex levels; AND provides students with feedback on their performance.</p>	<p>The teacher designs, enacts, and assists in challenging activities that demonstrate skillful integration of multiple standards simultaneously.</p>	<p>① Not observed</p> <p>② Emerging</p> <p>③ Developing</p> <p>④ Enacting</p> <p>⑤ Integrating</p>
<p>Instructional Conversation</p> <p><i>Teaching Through Conversation</i></p>	<p><i>Instructional Conversation</i> is not observed.</p>	<p>The teachers (a) responds to student talk in ways that are comfortable for students, OR (b) uses questioning, listening, or rephrasing to <i>elicit student talk</i>, OR (c) converses with students on a nonacademic topic.</p>	<p>The teacher converses with a small group of students on an academic topic AND <i>elicits student talk</i> with questioning, listening, rephrasing, or modeling.</p>	<p>The teacher designs and enacts an instructional conversation (IC) with a clear academic goal; listens carefully to assess and assist student understanding; AND questions students on their views, judgments, or rationales. All students are included in the IC, AND student talk occurs at higher rates than teacher talk.</p>	<p>The teacher designs, enacts, and assists in instructional conversations that demonstrate skillful integration of multiple standards simultaneously.</p>	<p>① Not observed</p> <p>② Emerging</p> <p>③ Developing</p> <p>④ Enacting</p> <p>⑤ Integrating</p>

Source: Hilberg, R. S., Doherty, R. W., Epaloose, G., & Tharp, R. G. (2004). The standards performance continuum: A performance-based measure of the standards for effective pedagogy. In H. C. Waxman, R. G. Tharp, & R. S. Hilberg (Eds.), *Observational research in U.S. classrooms: New approaches for understanding cultural and linguistic diversity* (pp. 57-59). Cambridge, UK: Cambridge University Press.

Section 8:

CERC Instructions

## CERC INSTRUCTIONS

This instrument is completed at the end of each classroom observation. A CERC form is attached to the back of each SSOS-R packet, following the COF, the QAIT, and the SPC.

First, the observer determines whether the first 14 items were evident in the classroom (i.e., cheerful and inviting classroom, adequate lighting, etc.). Then, the observer indicates whether 18 classroom resources were visible (noted as Vis. on the form) in the classroom and whether these specific resources were actually used (noted as Used on the form) during the observation.

NOTE: Two descriptors of the environment have been added to the CERC in the left-hand column that are a little difficult to conceptualize: culturally mediated instruction and student-controlled classroom discourse. Each is described below.

- *Culturally mediated instruction:* Instruction is characterized by the use of culturally mediated cognition, culturally appropriate social situations for learning, and culturally valued knowledge in curriculum content.
- *Student-controlled classroom discourse:* Students are given the opportunity to control some portion of the lesson, providing teachers with insight into the ways that speech and negotiation are used in the home and community.

**Project Name:**  
**Classroom Environment and Resources Checklist**

*Please indicate which of the following options were evident in the classroom by filling in the respective bubbles.*

*Please indicate whether the following resources were visible in the classroom (Vis.) and whether they were actually used during the observation (Used) by filling in the respective bubbles.*

- |  | Vis.                  | Used                  |                            | Vis.                  | Used                  |
|--|-----------------------|-----------------------|----------------------------|-----------------------|-----------------------|
| <input type="radio"/> Culturally mediated instruction              |                       |                       |                            |                       |                       |
| <input type="radio"/> Student-controlled classroom discourse       | <input type="radio"/> | <input type="radio"/> | Textbooks                  | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Use of multi-racial materials                | <input type="radio"/> | <input type="radio"/> | Workbooks/activity books   | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Use of non-sexist materials                  | <input type="radio"/> | <input type="radio"/> | Worksheets/activity sheets | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Posted classroom rules                       | <input type="radio"/> | <input type="radio"/> | Journals/learning logs     | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Posted assignments                           | <input type="radio"/> | <input type="radio"/> | Classroom library          |                       |                       |
| <input type="radio"/> Cheerful and inviting classroom              | <input type="radio"/> | <input type="radio"/> | Reference materials        | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Distinct activity centers                    | <input type="radio"/> | <input type="radio"/> | Map and/or globe           |                       |                       |
| <input type="radio"/> Adequate lighting                            | <input type="radio"/> | <input type="radio"/> | Games and/or puzzles       | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> Comfortable ventilation/temperature          | <input type="radio"/> | <input type="radio"/> | Instructional aids/props   |                       |                       |
| <input type="radio"/> Student work displayed                       | <input type="radio"/> | <input type="radio"/> | Science/lab table(s)       |                       |                       |
| <input type="radio"/> No distracting internal noises/interruptions | <input type="radio"/> | <input type="radio"/> | Classroom chalkboard       |                       |                       |
| <input type="radio"/> No distracting external noises/interruptions | <input type="radio"/> | <input type="radio"/> | Student-used equipment     |                       |                       |
| <input type="radio"/> Open, risk-free environment                  |                       |                       |                            |                       |                       |

Section 9:

School Information Form



Section 10:

Evaluation Form

# AEL EVALUATION FORM

*Special Strategies Observation System-Revised (SSOS-R) Training Session  
September 23-24, 2004*

Your opinions about this session are important to us. Please take a few minutes to complete this form.

## A. Background

Name (optional): \_\_\_\_\_ Professional role: \_\_\_\_\_

## B. Rating

For Questions 1 through 3, please circle your responses to all items using the following scale:

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>NA</b>
<i>Very Satisfied</i>	<i>Somewhat Satisfied</i>	<i>Neutral</i>	<i>Somewhat Dissatisfied</i>	<i>Very Dissatisfied</i>	<i>Not Applicable</i>

1. For the **training content** (information/materials/products) of this session, indicate your level of satisfaction with the:
 

a. Amount of information.	5	4	3	2	1	NA
b. Comprehensiveness of information.	5	4	3	2	1	NA
c. Usefulness of information.	5	4	3	2	1	NA
d. Technical quality of information.	5	4	3	2	1	NA
e. Potential to improve my work practices.	5	4	3	2	1	NA
  
2. For the **training process** used in this session, indicate your level of satisfaction with the:
 

a. Presentation style.	5	4	3	2	1	NA
b. Presentation efficiency.	5	4	3	2	1	NA
  
3. For the **training facilities** used in this session, indicate your level of satisfaction with the:
 

a. Equipment availability.	5	4	3	2	1	NA
b. Room accommodations.	5	4	3	2	1	NA

---OVER---

For Questions 4 through 9, please circle your responses using the following scale:

	<b>5</b> <i>Strongly Agree</i>	<b>4</b> <i>Agree</i>	<b>3</b> <i>Neutral</i>	<b>2</b> <i>Disagree</i>	<b>1</b> <i>Strongly Disagree</i>	<b>NA</b> <i>Not Applicable</i>
4. Provided me with <b>resources/information</b> that I can access for future use.	5	4	3	2	1	NA
5. Increased my <b>knowledge</b> relative to the topic presented.	5	4	3	2	1	NA
6. Increased my <b>skills</b> relative to the topic presented.	5	4	3	2	1	NA
7. Provided me with <b>knowledge and/or skills to incorporate into my work.</b>	5	4	3	2	1	NA
8. Stimulated me to <b>change my work behavior</b> to include the new knowledge and/or skills.	5	4	3	2	1	NA

**C. Comments**

1. I really liked:

2. I learned:

3. Suggested improvements:

4. Still need clarification on:

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Thank you!

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