

Performance Management Policy

Updated September 2007



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INVESTOR IN PEOPLE



Performance Management Policy

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1 introduction

At Ashcroft Technology Academy we are committed to performance management to develop all staff and improve teaching and learning and to raise standards of achievements for all students.

2 rationale

Performance management works best when it is an integral part of a school's culture; is seen to be fair and open; understood by everyone and based on shared commitment to supporting continuous improvement and recognising success.

This means:

- **raising standards:** looking in the round at the way schools work to provide the best possible education for their students and planning the work of individual members of staff in that context;
- **continuous professional development:** promoting professional growth and taking account of the individual development needs of each member of staff;
- **involvement:** encouraging all staff to be fully engaged in school planning, to control the development of their own work and to support each other;
- **manageability:** so that performance management is regarded as an integral and essential part of how schools operate;
- **equity:** to ensure policies and processes are open and fair, while respecting the confidentiality of individuals.

Benefits for the Individual

- greater confidence and improved morale for both individuals and teams of professional colleagues
- better professional relationships and communication within the Academy
- better planning and delivery of the curriculum
- help for individuals with their own career planning
- an opportunity to be better informed about others' work, enabling accurate references to be produced
- a focus for the professional development of the individual

Benefits for the Academy

- improves the quality of teaching and learning
- overall aims and goals are known and understood by all members of staff
- staff have clear guidelines relating to their roles and responsibilities
- a regular interchange of views regarding the purpose of the organisation, its methods and outcomes
- an organisational climate that encourages equality of treatment for all staff
- potential is recognised and action taken to develop it

Development Strategy

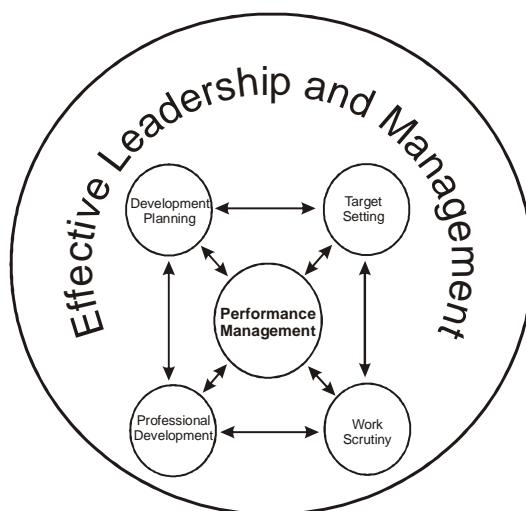
Performance Management Review is the part of the Academy Improvement System that focuses on the individual, their job and responsibilities, their performance and career development. It links with Improvement Planning, Professional Development and Work Scrutiny.

Performance Review is the process by which individuals agree their targets for contributing to the growth of Ashcroft Technology Academy. It is also one means by which individual staff can take on new responsibilities.

Professional Development supports all staff in the achievement of their responsibilities and targets. It is also the key to career development and can contribute to the cost of further/higher education.

Work Scrutiny is the means by which the Academy management team tracks the progress of the targets in performance reviews and provides all staff with feedback on their performance in relation to their job, their responsibilities and targets. It also leads to the identification of good practice (which should be recognised and shared) and Professional Development needs.

Performance Management unites these elements for the individual



3 roles

Performance Management is a shared responsibility. It involves the team leader and the member of staff working together to ensure targets – usually three – are discussed and agreed; regular and objective feedback is given; adequate coaching, training and development is provided and the performance review takes place

The team leader records the targets which will apply for the review period. These are jointly agreed if possible. If there are any differences of opinion about the targets, the member of staff may add comments to the written record of targets.

4 responsibility for reviews

We have carefully considered the practical arrangements for performance management in the Academy. The Principal has decided who shall act as team leader for each member of staff on the basis of responsibilities for learning in the Academy, a judgement about who has the best overview of the member of staff's work and the ability to provide support to staff.

5 timings of reviews

Our timetable is shown below:

(a) Targets set

These will inform and support our Academy management policies for the financial and academic years. We will take account of professional development objectives in setting the Academy's overall priorities for staff development.

(b) Monitoring and Feedback throughout the year

This section explains the Academy's arrangements for review, including at least one classroom observation for each teacher.

(c) Formal Reviews one year after objectives set

We will take into account Key Stage 3, GCSE, BTEC, AS/A2 and other outcomes from June/August results in considering student progress. We will set new objectives and discuss future professional development activities. A new individual plan will be completed for each member of staff.

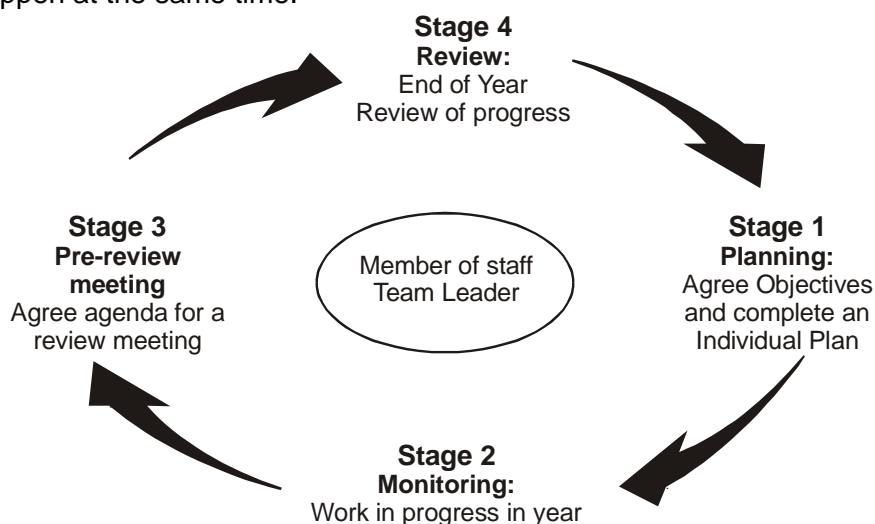
The review process will inform our Academy management policies and the Academy Improvement Plan for subsequent financial and academic years (especially the costs of the development/training discussed in reviews).

(d) The process outlined above continues annually

6 performance management cycle

Performance Management is set in the context of our academy's plans for improvement, against the background of national and local initiatives on improving teaching and any recent OFSTED report for the academy.

Performance Management is an ongoing cycle, not an event, involving 4 stages of planning, monitoring performance, pre-review and reviewing performance. The end of year review and Stage 1 may happen at the same time.



Stage 1: Planning – Each member of staff will discuss and agree targets with their team leader and record these in an individual plan. Targets should be challenging but realistic and take account of staff's job description and their existing skill and knowledge base.

There can be no hard and fast rule about how many targets there should be for staff but we expect a maximum of three to be agreed. Agreeing targets does not mean itemising every activity but picking out key expectations and yardsticks. The range of targets should match the nature of the job, including leadership or management areas as appropriate. Where someone has a wide range of managerial duties, targets might focus on specific areas of this work.

Teacher targets will cover student progress as well as ways of developing and improving teachers' professional practice. Leadership group staff and those with management allowances will have targets relating to their additional responsibilities. ***The Principal's objectives will cover academy leadership and management as well as student progress.***

We will adhere to the following principles in discussing targets:

- the team leader should ensure that staff understand what his or her targets involve, is in a position to achieve them, knows what they need to do to achieve them and understands when and how they will be reviewed;
- targets are written clearly and concisely and are measurable;
- targets focus on issues/matters over which staff have direct influence/control and take into account fully the wider socio-economic, cultural and other external influences on students; and
- targets for each member of staff should relate to the targets in the academy improvement plan and any departmental or team plans as well as to his/her own professional needs.

The team leader should record the targets which will apply for the review period. These should be jointly agreed if possible. If there are any differences of opinion about the targets the member of staff may add comments to the written record of targets.

Professional development opportunities are needed to support agreed targets, to develop strengths and address areas for development or professional growth. The development section of the review statement will be used to record action.

Stage 2: Monitoring Progress – The member of staff and team leader will keep progress under active review throughout the year using classroom observation and other relevant information. They will discuss any supportive action needed and keep improvement plans up-to-date.

The team leader consults the member of staff before seeking to obtain information, written or oral, relevant to their performance from other people. Peer evidence should be sought by a confidential e-mail asking for a comment on how 'x' is doing their job or a particular aspect of it. Peer evidence should be obtained in confidence, copies of evidence should not be handed over to the reviewee, they should be collated by the reviewer to give as full feedback as soon as possible on how 'x' is doing their job.

A minimum of one classroom observation takes place each year, following these principles:

- Successful observation requires preparation and training, and a clear understanding on the part of the teacher and team leader of its purpose.
- The nature of the observation depends on its purpose.
- It is important that the observer ensures that the lesson proceeds in as normal an atmosphere as possible.
- Full, constructive and timely feedback is given (usually within 24 hours of the observation)
- A copy of all lesson observations should be given to the Vice Principal to enable work scrutiny in this area. A copy should also be included with the review statement given to the Assistant Principal responsible for teaching and learning.

Stage 3: The pre-review meeting – Before the formal annual review there will be a pre-review meeting between the member of staff and the team leader. The meeting needs to be professional but friendly and relaxed.

The purpose of the meeting is to:

- clarify the purpose of the review process
- agree the scope of the review and, by using the job description, identify areas of the post-holder's work on which the review might focus.
- agree the arrangements for the review meeting
- negotiate and agree the other sources from whom information could be collected
- identify the documentation which will be required for the review meeting:
 - self-review (to the reviewer at least 24 hours before the meeting)
 - the review statement
 - analysis of class results by teaching staff
- agree the date, time and place for the review interview

Stage 4: Reviewing Performance: *The annual review of staff performance will use the recorded objectives as a focus to discuss his/her achievements and identify any development needs.* It will be combined with agreeing objectives for the following performance management cycle.

The focus of the review is on how to raise performance and improve effectiveness. It will involve:

- Reviewing, discussing and confirming the staff's essential tasks and targets;
- Recognising strengths and achievements and taking account of factors outside the staff's control;
- Confirming action agreed with staff at other reviews;
- Identifying areas for development and how these will be met;
- Recognising personal development needs; and
- Agreeing new clear targets and completing an individual plan for the year ahead.

The team leader should evaluate staff's overall performance, including an assessment of the extent to which targets have been met, and members of staff's contribution to the life of the Academy during the review period. To include evaluative feedback on any PD training received both externally and in-house, and how this has helped their development; and on any contribution they have made to training and developing others. It should take account of the stage the member of staff is at in his or her career eg 2 – 3 years service, advanced skills teacher, senior manager.

*Within 10 days of the review meeting, the team leader will prepare a written review statement recording the main points made at the review and the conclusions reached, including any identified development needs and activities. Once written, the team leader will give the member of staff a copy of the statement. He/she may within 10 days of first having access to the statement, add to it comments in writing. **Good practice shows that the review statement should be written as soon as possible after the review, whilst the facts are still fresh in the team leader's memory.***

The Principal has an annual performance review meeting in December each year with the Chairman of the Executive Board.

What Managers do on a day-to-day basis

The Performance Management process is one aspect of good management. It provides a formal opportunity for Team Leaders and their team members to discuss important issues such as performance, career aspirations, job development and professional development. However there should be no surprises during annual review meetings, rather a review of the on-going feedback and support that managers should be providing to those they manage on a daily basis. All staff need to have feedback on performance and know that they can approach line managers to discuss concerns, take advice and share our ideas. Where line managers empower their staff, everyone benefits especially the students as the full potential of the staff is realised.

Managers will:

- ensure that they maintain an interest and awareness of how team members are performing
- keep their team members informed about how they are performing, recognising achievements and providing support where it is needed
- be approachable and a good listener
- take responsibility for maintaining a positive and productive working environment for their teams. Running an academy is a serious business but it can also be enjoyable.

Self-review

The purpose of self-review is to help staff get the maximum benefit from the review meeting and staff are strongly advised to reflect on their own performance.

As part of the self-review staff should :

- review and update their curriculum vitae
- consider their own job description
- reflect on their own strengths, skills and areas for professional development
- think about those colleagues who could best provide further information regarding their wider involvement in the academy
- consider involving a friend or colleague to help with their self-review

Staff should use the self-review pro-forma to record the outcomes of their self-review and let their team leader have a copy of this in advance of the review interview (24 hours minimum).

A copy of the Self-Review pro-forma can be found in Section 13

The collection of other data

It is important that data representing all aspects of staff's job is collected ie 'totality of performance'. The type of data and how it will be collected should be discussed by staff and their team leader during the pre-review meeting.

The data to be collected could include documents such as :

- feedback from monitoring of teaching
- information regarding NC Assessments tasks/examination results to include the latest set of value added data and results
- feedback on any pastoral role
- feedback on the customer service role
- policy documents staff have prepared
- students' work
- any other relevant information concerning staff's wider involvement in the academy
- stock management systems
- administration procedure

In addition, staff and their team leader may feel it appropriate to consult other people to obtain information which is relevant to the review. It is recommended that Managers should seek feedback from those staff they manage regarding their performance in the role (Upward Appraisal).

This is a sensitive area and care will need to be exercised by the team leader to ensure that there is total understanding and agreement throughout. (See page 6, Stage 2 Monitoring process)

The e-mail is a speedy way of collecting information from other sources, but care must be taken to ensure appropriate levels of confidentiality ie emails should not be handed over to the reviewee, key words and sentences should be fed back thus maintaining the confidentiality of staff providing peer evidence.

7 links between pay, career stages and performance management

Customer Service

This section of the review focuses on customers of the Academy. It includes parents, neighbours, groups and organisations that hire academy facilities, people who represent organisations with an interest in the Academy (such as the DfES, OFSTED, business sponsors and associated companies, visitors to the Academy and those who contact the Academy for information.

Depending on their role within the Academy staff will be responsible for caring for the needs of different user groups. However in all communications the Academy staff should endeavour to achieve the standards detailed in the Customer Service Policy below:

Customer Service Policy

At Ashcroft Technology Academy we aim to provide a service that is prompt, helpful, friendly and professional.

To help achieve this aim we work to a common set of standards.

We aim to:

- Reply to enquiries made in person immediately, or deal with that enquiry within one working day.
- Deal with telephone calls promptly and in a pleasant and helpful manner, aiming where possible to answer within six rings once through to the appropriate extension.
- Ensure that a response is given to a telephone message within 2 working days. Where a final response cannot be given immediately, we will tell the caller how long it should take to complete the enquiry and who to contact in the meantime.
- Ensure that messages taken for colleagues are passed on promptly to the named person, or in the event of absence, to another colleague who can deal with it.
- Acknowledge correspondence within 5 working days of receipt. Where it is necessary to pass on correspondence to another person we will tell the customer explain what has happened and who will be the named contact for future action.

The Customer Service focus for different staff groups

The Customer Service role for the majority of our staff will be clear as they have direct dealings with our customers. Below are examples of the key areas of Customer Service for the various staff responsibilities. Evidence to support performance in the Customer Service aspect of staff roles should be gathered in the same way as other areas of the performance management process.

| Staff Group | Customer Service focus |
|------------------------------|--|
| Office staff | <ul style="list-style-type: none"> • Front line in communications with customers. |
| Finance and Resources Office | <ul style="list-style-type: none"> • All financial aspects of working with customers |
| Building Services | Communications with : <ul style="list-style-type: none"> • Evening class and weekend users/Delivery personnel/Neighbours |
| Other Associate Staff | This will depend on the specific role. eg <ul style="list-style-type: none"> • Technical staff – suppliers • Reprographics – parents (uniform), suppliers, external users of our reprographics facilities |
| Leadership Group | <ul style="list-style-type: none"> • Responding to communications from the broad range of our customers |
| SPMs | <ul style="list-style-type: none"> • Communications with parents |
| CMs | <ul style="list-style-type: none"> • Communications with parents • Communications with examination boards etc |
| Teaching staff | <ul style="list-style-type: none"> • Communications with parents at 'Parent Evenings' • Communications with parents in the tutor role • Providing KSLMs/CMs with information relating to parental enquiries |

FOR TEACHING STAFF:

Currently Ashcroft Technology Academy *chooses* to align its performance management policy to the 'School Teachers Pay and Conditions Document (2007)'. However, this position is under annual review.

NQTs – the final review meeting of the induction period should be used to agree targets and professional development opportunities as the first stage of the teacher's subsequent performance management cycle; (circular No: 5/99 The Induction Period for Newly Qualified Teachers para 58.)

Information from the performance review statement can be used to inform aspects of the new pay structure from September 2007.

- Up to the Threshold – teachers can expect an annual increment if they are performing satisfactorily. Recommendations for Withheld Increments (for less than satisfactory

performance) and recommendations for Double Increments (for exceptional performance) would need to be justified by review outcomes.

- Threshold – If a member of staff is eligible to cross the threshold then in that year's performance review, threshold standards should be discussed. See [http://www.teachernet.gov.uk/management/payandperformance/performance threshold](http://www.teachernet.gov.uk/management/payandperformance/performance%20threshold) – teachers who want to move to the upper pay spine should fill out the application form provided by the DCFS. Evidence from reviews will be used to inform applications by teachers and assessment by heads.

UPS Progression – In that year a member of staff is eligible for UPS progression the reviewer must discuss the threshold standards and how the reviewee has demonstrated progression in each standard since the last review. There must be successful reviews between each upper pay spine point. Those staff eligible must put in writing to the Principal that they would like to be considered for progression. They should include any evidence they would like to be considered and the two most recent lesson observations. Performance reviews will form part of the evidence which schools can use to make decisions about awarding performance pay points to eligible teachers.

- CLT – If the reviewee is eligible for CLT status both reviewer and reviewee should discuss the 12 CLT standards and evidence that supports them. Forms are available in the Performance Management folder on the staff shared area. Staff can also visit www.clt.ac.uk

FOR ASSOCIATE STAFF

The Trustees of the Academy have implemented a pay process for the non-teaching staff at the Academy, whereby no set salary scale exists. Staff are appointed at an agreed salary level, deemed appropriate to both the position and the appointed person and then reviewed annually thereafter.

Reviews take account of individual performance in the previous twelve months and staff are rewarded accordingly, whilst bearing in mind upper levels that a position is likely to be funded up to in the public sector.

Career development is an integral part of performance management and associate staff are encouraged to develop themselves in order to further their careers.

8 managing weak performance

The review meeting and review statement do not form part of any formal disciplinary or capability procedures. However, relevant information from review statements may be taken into account by those who have access to them in making decisions and in advising those responsible for taking decisions, or making recommendations about performance, pay, promotion, dismissal or disciplinary matters.

9 confidentiality

The individual plan and the review statement are personal and confidential documents and are kept in a secure place.

10 access to outcomes

There will only be three copies of the review statement – one held by the member of staff and one by the reviewer, another is held by the Principal on a central file.

Information about performance reviews are made available as listed below:

- the Principal ensures that training and development needs from the review statement are given to the person responsible for training and development at the Academy;
- the Principal reports annually to the Executive Board and to the Trustees on performance management in the academy, including the effectiveness of the performance management procedures in the Academy, and the training and development needs of teachers.

The Principal will keep review statements for at least three years.

NB Please note that those teachers awarded CLT status will have a copy of their 'Professional Reflection' housed with the Academy for a period of 3 years.

11 complaints

The Review

Within 10 days of receiving the review statement:

Staff can record their dissatisfaction with aspects of the review on the review statement. Where these cannot be resolved with the team leader, they can raise their concerns with the next more senior line manager (the Review Officer). Where the Principal is the line manager then staff can raise the issue with the Chair of the Executive Board.

The review officer will investigate the complaint and take into account comments made by the job holder. She/he may decide that the review statement should remain unchanged or may add any observations of his/her own. The review officer may decide, with the agreement of the person responsible for carrying out the initial review, to amend the review statement; or declare that the review statement is void and order a new review or part of the review to be repeated. For teachers, the Principal may appoint a new reviewer. A revised review will be conducted in a reasonable timescale and the matter closed.

12 evaluation of the policy

The Principal shall provide an annual report to the Executive Board and the Trustees on how effective the performance management procedures have been.

As an Academy committed to ensuring that individual staff, teams and the academy continue to improve, the Executive Board and the principal will satisfy themselves that effective and challenging objectives are set, that all reviews are completed on time and the assessment of performance is consistently applied in the academy. We will evaluate the effectiveness of the policy in helping to improve standards of teaching and learning.

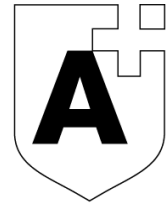
As part of our ongoing commitment the Executive Board and the Principal will update and amend the documentation and the process as required, after consultation with all staff, to incorporate any major changes recommended either by the DCSF or the academy to ensure that the policy is up-to-date and effective in our academy.

13 standardised documentation

Attached – **copies of standard documents**

Self-Review Pro-forma (Teaching staff)

(Please give to your reviewer at least 24 hours before the review meeting)



Name: _____

Date of Review: _____

How do you feel you have performed with regard to your primary role and performance targets?
(Please also comment on management of workload and management of staffing where applicable.)

In relation to making a positive contribution towards the Academy and with particular reference to behaviour management, do you consider that you:

| | | |
|---|--|---|
| 1. Need support / training <input type="checkbox"/> | 2. Are doing well <input type="checkbox"/> | 3. Have strengths you can offer others <input type="checkbox"/> |
|---|--|---|

Please elaborate:

Which strategic objectives in the ASP do you think you make a contribution to?

How have you supported the Academy's Customer Service policy? Give examples:

Please review your current job description and indicate if there any aspects of it which you think need updating or developing? *(you can view generic JD's in the Performance review folder for teaching staff)*

Which aspects of your job have given you the greatest satisfaction?

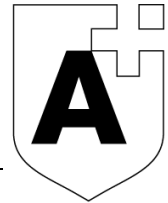
Are there any aspects of your role that can be improved upon? How can this be achieved?

What additional aspects of your role or potential opportunities in the short or longer term would you like to discuss during the Performance Review?

In terms of future targets which areas would you like to discuss at your next review.

Performance Review Statement – Teaching staff

Is the reviewee eligible for UPS progression at the start of the next academic year. If yes he/she must be assessed against all the threshold standards and demonstrate progression in each area since the last review.



Name of Postholder _____ Position in Academy: _____

Date started current job: _____ Period covered by review: _____

Name of Reviewer: _____ Position in Academy: _____

Date of review: _____ Number of lessons monitored: _____

| Pay Scale | |
|-----------|--|
| Point | |
| T/due | |
| UPS due | |
| CLT due | |

| | | | | | | |
|----------------------------|--|---|--|-------------|----------------|--------------------------|
| Overall quality of lessons | | Attendance No of periods of absence in last year | | Punctuality | Excellent | <input type="checkbox"/> |
| | | | | | Good | <input type="checkbox"/> |
| | | | | | Satisfactory | <input type="checkbox"/> |
| | | | | | Unsatisfactory | <input type="checkbox"/> |
| | | | | | | |

Primary role (s) Teaching, Pastoral, Customer Service

TARGET 1 Targets from 20.../20...

| Overall assessment of performance targets from your previous review 20.../20... | | |
|---|--------|------------------|
| Teaching groups | Target | Targets Achieved |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

| Reviewers comments on Target 1 met/notmet/partially met | Subject Performance | | For CMs/ DPs only | Actual Performance |
|--|---------------------|--------|----------------------|--------------------|
| | Key stage | Target | | |
| | | KS3 | | |
| | | KS4 | | |
| | | KS5 | | |

TARGET 2

Professional

Reviewer's comments on target 2 met /not met/ partially met (please check box)

TARGET 3

Professional

Reviewer's comments on target 3 met /not met/ partially met (please check box)

TARGETS FOR 20.../20...

TARGET 1

| Teaching groups | Targets: by level/grade |
|-----------------|-------------------------|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

| Subject Performance | | For CMS/ DPs only |
|---------------------|--------|----------------------|
| Key stage | Target | |
| KS3 | | |
| KS4 | | |
| KS5 | | |

TARGET 2

Professional

TARGET 3

Professional

| | |
|---|--|
| Reviewers recommendation re pay scale progression: | |
|---|--|

Statement Agreed by : Postholder (signature and date) :

.....

Reviewer (signature and date) :

.....

Development and training needed to support achievement targets

Review of job description

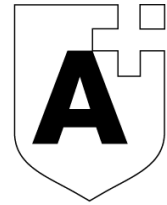
CPD Portfolio

You should list here any other activities you have been involved in this year that have added to your whole academy contribution –eg Organising a trip, Delivery of CPD to staff etc

**ALL REVIEWEES TO MAKE A COPY OF THIS PAGE FOR
DEPUTY PRINCIPAL RESPONSIBLE FOR CPD**

Self-Review Pro-forma (Associate staff)

(Please give to your reviewer at least 24 hours before the review meeting)



Name: _____

Date of Review: _____

How do you feel you have performed with regard to your primary role and performance targets?
(Please also comment on management of workload and management of staffing where applicable.)

In relation to making a positive contribution towards the Academy do you consider that you:

| | | |
|---|--|---|
| 1. Need support / training <input type="checkbox"/> | 2. Are doing well <input type="checkbox"/> | 3. Have strengths you can offer others <input type="checkbox"/> |
|---|--|---|

Please elaborate:

Which strategic objectives in the ASP do you think you make a contribution to?

How have you supported the Academy's Customer Service policy? Give examples:

Please review your current job description and indicate if there any aspects of it which you think need updating or developing?

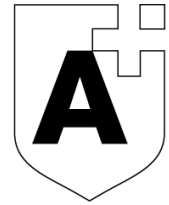
Which aspects of your job have given you the greatest satisfaction?

Are there any aspects of your role that can be improved upon? How can this be achieved?

What additional aspects of your role or potential opportunities in the short or longer term would you like to discuss during the Performance Review?

In terms of future targets which areas would you like to discuss at your next review.

Performance Review Statement – Associate Staff



Name of Postholder: _____

Position: _____

Name of Reviewer: _____

Position: _____

Date of Review: _____

Date of Last Review: _____

| | | | | |
|---------------------------------------|--|--------------------|----------------|--------------------------|
| Attendance | | Punctuality | Excellent | <input type="checkbox"/> |
| No of periods of absence in last year | | | Good | <input type="checkbox"/> |
| No of days of absence in last year | | | Satisfactory | <input type="checkbox"/> |
| | | | Unsatisfactory | <input type="checkbox"/> |

Overall assessment of performance from your previous review dated: _____

Customer Service Role

Reviewers comment on targets: met / not met / partially met (please check appropriate box)

Target 1:

Reviewers comment on targets: met / not met / partially met (please check appropriate box)

Target 2:

Reviewers comment on targets: met / not met / partially met (please check appropriate box)

Target 3:

Reviewers comment on targets: met / not met / partially met (please check appropriate box)

Target 4:

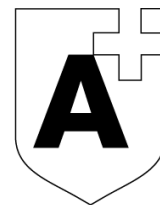
Reviewers comment on targets: met / not met / partially met (please check appropriate box)

Review of Job Description

Action Plan – Targets for the next 12 months

| Target | How will this be achieved and over what time-scale? | Success criteria |
|--------|---|------------------|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |

Lesson Observation



| | | | | | |
|-----------------------|--|---------------------|--|---------------|--|
| Observation of | | Class (code) | | | |
| Department | | No. Present | | | |
| Observed by | | Date | | Period | |
| Lesson Context | | | | | |

| | Content of lesson | Evidence |
|--|--------------------------|-----------------|
| Recap of previous learning elicited from students | | |
| Learning objectives discussed with students | | |
| Appropriate homework task set, if required | | |
| A variety of learning styles used and there is 'recap' during the lesson | | |
| Appropriate use of praise | | |
| Teaching is consistently challenging and materials are differentiated | | |
| Appropriate AfL strategies used | | |
| There is discussion about students' attainment and next steps (ie; reference made to specific levels and criteria) | | |
| Plenary session to discuss what has been learned (related to lesson objectives) | | |

| Evaluation |
|-------------------|
| |

Quality of books/markings

| Strengths | Even better if |
|------------------|-----------------------|
| | |

Please insert a grade for each aspect of the lesson

| Learning and Progress | Teaching | Assessment to support Learning | Overall Grade |
|------------------------------|-----------------|---------------------------------------|----------------------|

Signed: _____

Date: _____

Learning and progress judgements

The overall judgement should be a 'best fit' of the grade descriptions in the box

| Description | Characteristics |
|--------------|---|
| Outstanding | <ul style="list-style-type: none"> • The students acquire knowledge, develop understanding and learn and practise skills exceptionally well • Students demonstrate excellent concentration and are rarely off task, even in extended periods without direction from an adult • They have developed resilience when tackling challenging activities • Their keenness and commitment to succeed and grasp opportunities to extend learning and improve their learning are exceptional • Progress is at least good and in some cases is exceptional |
| Good | <ul style="list-style-type: none"> • The students acquire knowledge, develop understanding and learn and practise skills well • The students are keen to do well, apply themselves diligently and work at a good pace • They seek to produce their best work and are usually interested and enthusiastic about their learning • A very large majority of students make at least good progress and some may make outstanding progress, with nothing inadequate |
| Satisfactory | <ul style="list-style-type: none"> • The extent to which students acquire knowledge, develop understanding and learn and practise skills is at least satisfactory • Most students work effectively when provided with appropriate tasks and guidance but lack confidence in improving the quality of their work • Students generally work steadily and occasionally show high levels of enthusiasm and interest • Students make the progress expected given their starting point and some, although not the majority, may make good progress • Progress is inadequate in no major respect and may be good in some respects |
| Inadequate | <ul style="list-style-type: none"> • Learning and progress cannot be adequate if: • The extent to which students acquire knowledge, develop understanding and learn and practise skills is inadequate <p>or</p> <ul style="list-style-type: none"> • Too many students fail to work effectively unless closely directed by an adult and give up easily. • Students do not enjoy the activities provided, which is reflected in poor completion of tasks <p>or</p> <ul style="list-style-type: none"> • Students make too little progress |

Quality of teaching and assessment to support learning judgements

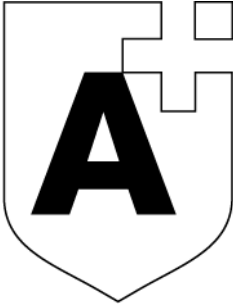
(Use the same descriptors for both judgements)

The overall judgement should be a 'best fit' of the grade descriptions in the box

| Description | Characteristics |
|-------------|--|
| Outstanding | <ul style="list-style-type: none"> • Teaching is at least good and much is outstanding, with the result that the students are making exceptional progress • Teaching is highly effective in inspiring students and ensuring that they learn extremely well • Excellent subject knowledge is applied consistently to challenge and inspire students • Resources, including new technology, make a marked contribution to the quality of learning, as does the precisely targeted support by other adults • Teachers and other adults are acutely aware of their students' capabilities and of their prior learning and understanding, and plan very effectively to build on these • Marking and dialogue between teachers, other adults and students are consistently of a very high quality • Students understand in detail how to improve their work and are consistently supported in doing so • Teachers systematically and effectively check students' understanding throughout the lesson, anticipating where they may need to intervene and doing so with striking impact on the quality of learning • The standard is shared with students and reference is therefore made to levels and/or grades throughout the lesson • Students are aware of their progress and understand the steps required in order to further improve |
| Good | <ul style="list-style-type: none"> • Teaching is consistently effective in ensuring that students are motivated and engaged • The great majority of teaching is securing good progress and learning • Teacher has strong subject knowledge which enthuses and challenges most students and contributes to their good progress • Good and imaginative use is made of resources, including new technology to enhance learning • Other adults' support is well-focused and makes a significant contribution to the quality of learning • As a result of good assessment procedures, teachers and other adults plan well to meet the needs of all students • Students are provided with detailed feedback, both orally and through marking. They know how well they have done and can discuss what they need to do to sustain good progress • The teacher listens to, observes and questions groups of students during the lesson in order to reshape tasks and explanations to improve learning • The standard is shared with students and reference is therefore made to levels and/or grades throughout the lesson • Students have an awareness of their current grade |

| | |
|--------------|--|
| Satisfactory | <ul style="list-style-type: none"> • Teaching may be good in some respects and there are no endemic inadequacies • Students show interest in their work and are making progress that is broadly in line with their capabilities • Subject knowledge is secure • Adequate use is made of resources, including new technology, to support learning • Support provided by other adults is effectively deployed • Teaching ensures that students are generally engaged by their work and little time is wasted • Regular and accurate assessment informs planning, which generally meets the needs of <u>all</u> students • Students are informed about their progress and how to improve through marking and dialogue with adults • The teacher monitors students' work throughout the lesson, picks up general misconceptions and adjusts their plans accordingly to support learning |
| Inadequate | <ul style="list-style-type: none"> • The quality of teaching and/or the use of assessment to improve learning cannot be adequate if: • Expectations are inappropriate and teaching fails to promote students' learning, progress or enjoyment <p>or</p> <ul style="list-style-type: none"> • Assessment takes too little account of the students' prior learning or their understanding of tasks and is not used effectively to help them improve |

LESSON OBSERVATION EVALUATION



| | |
|-----------------------|--|
| Date of lesson | |
|-----------------------|--|

| | |
|----------------|--|
| Subject | |
|----------------|--|

| | |
|-----------------|--|
| Observer | |
|-----------------|--|

| | |
|----------------|--|
| Teacher | |
|----------------|--|

| |
|--|
| Comments for Feedback/Areas for Development |
| |

Signed

Date

Lesson Plan



| | | | | | |
|------|--|------|--|-------|--|
| Name | | Date | | Class | |
|------|--|------|--|-------|--|

| |
|--|
| Special considerations (SEN, G and T, levels, literacy, numeracy) |
|--|

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| Module/ Topic/ Context |
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| Resources |
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|--------------------------|
| Lesson objectives |
|--------------------------|

| | |
|-------------|--|
| All must | |
| Most should | |
| Some could | |

| | | |
|-------------|-------------------------|-------------------------|
| Time | Teacher Activity | Student Activity |
|-------------|-------------------------|-------------------------|

| | | |
|--|--|--|
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Assessment Opportunities

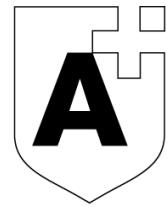
Target grades and level shared -

Next steps - Reflections

Homework

Work Monitoring Evaluation Form

Date



| | | | |
|----------------------|--|----------------------------|--|
| Monitor | | Teacher: | |
| Year group(s) | | Sample size | |
| Subject | | Set (if applicable) | |

| | |
|---|----------------|
| Focus (ie main purpose of the inspection activity) | Context |
| | |

| |
|-------------------|
| Evaluation |
| |

| |
|-------------------------------|
| Summary of main points |
| |

| | | |
|--|--|--|
| Overall judgement of Assessment for Learning for the monitored work 1 = Outstanding, 4 = Inadequate | | |
|--|--|--|

| Overall gradings of work sample | | | Percentages from bottom of monitoring form | | |
|--|--------------|----------|---|--------------|----------|
| Assessment for learning | Presentation | Homework | Assessment for learning | Presentation | Homework |
| | | | / / / | / / / | / / / |

Work Monitoring Evaluation

Key areas to note over the monitoring time:

| | | |
|------------|------------|------------|
| 1 learning | 2 teaching | 3 progress |
|------------|------------|------------|

The **overall grade** is based on these **three** areas

If quality learning is taking place the teaching should be **engaging, interesting, challenging, enjoyable**, students should make **progress** and you should see **evidence** of this.

Grade 1: Outstanding:

Highly effective, very rapid, well above average.

Is at least good in all or nearly all respects and is exemplary in significant elements, as shown by the exceptional enjoyment and progress of the learners.

Significant elements:

- Progress
- Appropriately matched, challenging objectives
- Behaviour and attitudes
- Assessment of learners
- Appropriately chosen methods which stimulate and engage learners
- Teacher's subject knowledge
- Teacher's expectations
- Use and variety of resources to include classroom support assistants
- Use of time / pacing
- Health and safety
- Use of appropriate school systems
- Excellent use of differentiation throughout lesson

Grade 2: Good:

Effective, fast, above average.

Most learners make good progress because of the good teaching they receive.

Significant elements:

- Progress
- Appropriately matched, challenging objectives
- Behaviour and attitudes
- Assessment of learners
- Appropriately chosen methods which stimulate and engage learners
- Teacher's subject knowledge
- Teacher's expectations
- Use and variety of resources to include classroom support assistants
- Use of time / pacing
- Use of appropriate school systems
- Health and safety
- Good use of differentiation – several occasions

Grade 3: Satisfactory:

Sound, acceptable, average.

Inadequate in no major respect and may be good in some respects. Enjoyment is satisfactory. Progress is satisfactory

Significant elements:

- Progress
- Appropriately matched, challenging objectives
- Behaviour and attitudes
- Assessment of learners
- Appropriately chosen methods which stimulate and engage learners
- Teacher's subject knowledge
- Teacher's expectations
- Use and variety of resources to include classroom support assistants
- Use of time / pacing
- Health and safety
- Use of appropriate school systems
- Satisfactory use of differentiation

Grade 4: Inadequate:

Ineffective, slow, below average, well below average, cause for concern – urgent action / change needed

Significant elements:

- Progress – Most learners, or a significant specific minority of learners, make less than satisfactory progress whether this is due to unsatisfactory teaching, or the impact of bad behaviour.
- Appropriately matched, challenging objectives – work badly matched to students starting points
- Behaviour and attitudes – Learners overall behaviour or attitudes are unsatisfactory, and the tone of the lesson is inimical to the development of learners personal qualities
- Assessment of learners – poor
- Appropriately chosen methods which stimulate and engage learners – methods which are poorly geared towards the learning objectives
- Teacher's subject knowledge – weak knowledge of the curriculum leading to inadequate teaching and low demands on students
- Teacher's expectations low, not challenging enough
- Use and variety of resources to include classroom support assistants – inadequate
- Use of time / pacing – poor
- Health and safety of the learners is endangered
- Use of appropriate school systems
- No evidence of differentiation