

Kingsdale Foundation School

Performance Management Policy

For details of the School's Appraisal Procedure for staff, please refer to Pay & Appraisal Policy

Contents

Introduction

1. **Rationale - explains the value of Performance Management.**
2. **Roles** - introduces the roles of different people in the performance management process.
3. **Responsibility for reviews** - recommends careful planning to make sure the review process is manageable and to ensure all teachers know who will be responsible for their reviews.
4. **Timing of reviews** - explains the timing of the school's review cycle taking into account the statutory requirements for setting objectives and the length of review cycles.
5. **Performance Management Cycle** - explains the cycle of planning, monitoring and reviewing performance as it will operate in the school.
6. **Managing weak performance** - explains that the performance management process does not form part of any formal disciplinary or capability processes but may inform certain decisions or recommendations.
7. **Confidentiality** - sets out clearly the confidential nature of performance management documents and the need to keep them in a secure place.
8. **Access to outcomes** - shows the statutory position about who can have access to review statements or information contained in them.
9. **Complaints** - sets out the statutory process to follow if a complaint is made about the annual review.
10. **Evaluation of the policy** - brings out the school's commitment to review the effectiveness of the review process each year.
11. **Standardised documentation** - includes recommended documents for use by the school for performance management. Appendix A summarises the roles and responsibilities of teachers and post holders. Appendix B provides the model for an Individual Plan and Appendix C shows a classroom observation form which may be used. Appendix D is a summary of a Career Stage Expectations for a teacher and Appendix E is a summary of the applicable appraisal School Generic Targets for information and to inform the personalised performance management target/objective setting process.

1. Introduction

In this school we are committed to Performance Management to develop all staff and improve teaching and to raise standards of achievement for all children. This policy covers all teachers and members of the support staff, except teachers/staff on contracts of less than one year and those in their induction years (ECTs). Teachers and support staff have been consulted in developing this policy. It sets out a framework for all staff to agree and review priorities and objectives within the context of the school's key priorities, development plan and their own professional needs. Please be advised that this school operates a separate Pay & Appraisal Policy (performance related pay policy) which may be informed by but is discrete from this Performance Management Policy which focuses on the personal development of individual staff and not their remuneration arrangements. Team leaders and line managers are prohibited from making appraisal or performance related pay recommendations for staff under this procedure.

2. Rationale

Performance management means a shared commitment to high performance. It helps to focus attention on more effective teaching, quality assurance and monitoring to raise the quality of teaching, management and leadership and to benefit pupils, teachers, support staff and the school. It means providing appropriate and effective personal training and development to ensure job satisfaction, a high level of expertise and progression of staff in their chosen profession.

We want to improve school performance by developing the effectiveness of teachers and support staff, as individuals, leaders and as teams. The evidence is that standards rise when schools and individual teachers, support staff, managers and leaders are clear about what they expect pupils to achieve. That is why performance management is important.

We will implement our performance management arrangements on the basis of:

- i. Fairness: We all need to be aware of the potential for unconscious discrimination and to avoid assumptions about individuals based on stereotypes; and
- ii. Equal Opportunity: All teachers and support staff should be encouraged and supported to achieve their potential through agreeing objectives, undertaking development and having their performance assessed.

3. Roles

Performance management is a shared responsibility. The Governing Body has a strategic role in agreeing the school's Performance Management Policy, ensuring that performance of teachers and support staff at the school is regularly reviewed and for oversight of the performance management process. The Headteacher is responsible for ensuring that arrangements for performance management reviews are in place. Individual staff and team leaders are responsible for implementing the Policy at a local level.

Performance management involves both the team leader and the teacher working together to ensure that suitably challenging objectives are discussed and agreed; regular and objective feedback is given through a variety of mechanisms; adequate coaching, training, guidance are provided and that the performance review takes place (normally during the Autumn term).

An External Adviser may provide advice to the Governing Body's representatives on the setting of performance objectives for a Headteacher and may support them in reviewing performance at the end of the review cycle.

4. Responsibility for Reviews

We have carefully considered the practical arrangements for performance management in the school. Governors have been appointed to carry out the Headteachers' performance management reviews with the Headteacher (Executive) for the Headteacher (Operational). The Headteacher decides who shall act as team leader for each teacher on the basis of responsibilities for learning in the school, a judgement about who has the best overview of the teacher's work and the ability to provide support to staff. In doing this, the Headteacher has delegated responsibility to an appropriate team leader to ensure that each reviewer is responsible for a limited number of reviews.

Good practice shows that reviewers do not normally have allocated to them more than 6 reviewees. We have decided that we will usually limit the number of reviewees to 6 with the exception of the Head teacher who should normally have no more than 10 but preferably less i.e. members of the senior executive team, senior finance and HR staff.

5. Timing of Reviews

The one-year performance management cycle links with our planning for school management and target-setting.

Our scheduled timetable is shown below:

(a) Objectives set in the Autumn term

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

(b) Monitoring and Feedback

This section explains the school's compulsory arrangements for review, including **at least** 3 hours of classroom observations for each teacher and retaining video recordings of all teachers' lessons.

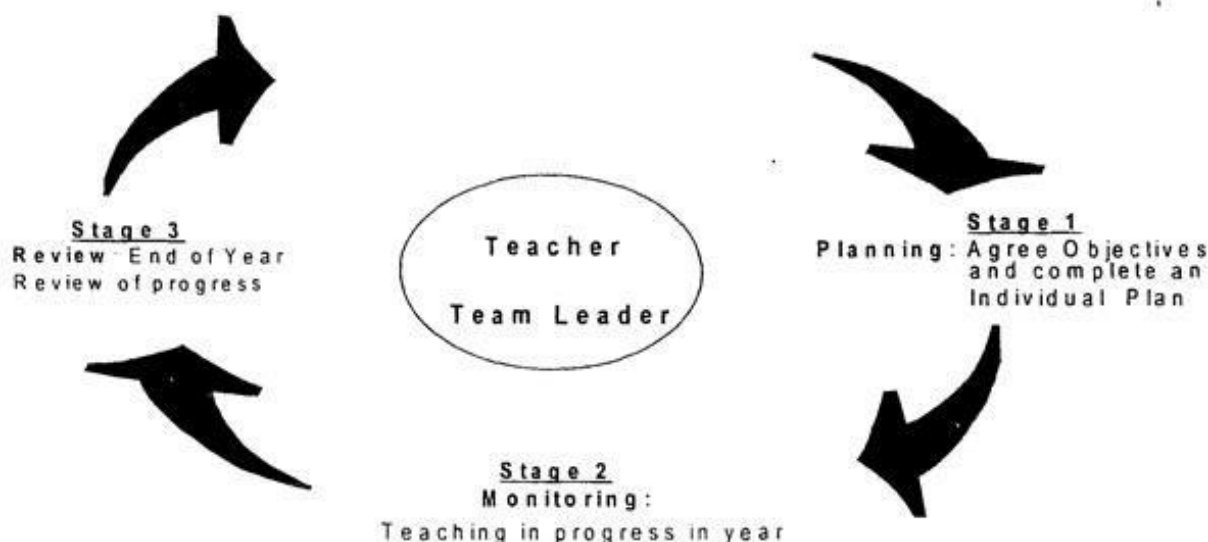
(c) Formal Reviews in the Autumn Term

We will take into account Key Stage 5, GCSE and other measurable academic, pastoral (e.g. attendance, punctuality, disciplinary) outcomes from the previous academic year in considering pupil progress. We will set new objectives and discuss future professional development activities. A new individual plan will be completed for each teacher and member of support staff.

The review process will inform our school management policies and the School Development/Improvement Plan for the financial and academic years which follow (*especially the costs of the development/training discussed in reviews if approved*).

(d) The process outlined in (c) above continues annually.

Example of Performance Management Cycle for a Classroom Teacher



6. Performance Management Cycle

Performance Management is set in the context of our school's plans for development, national and local initiatives on improving teaching and any recent OFSTED/HMI report for the school.

Performance Management is an ongoing cycle, not an event, involving 3 stages of planning, monitoring performance and reviewing performance. The end of year review followed by Stage 1 may happen at the same time.

The performance management cycle must begin with a self-evaluation and review of the individual member of staff's job description and key responsibilities to be shared and agreed with the team leader. The team leader is required to evaluate and confirm particulars before proceeding to Stage 1. The process cannot begin until details have been confirmed and mutually agreed and must normally be concluded before the end of the first Autumn half-term. Where there is a difference of opinion the matter should be referred to the Headteacher whose determination will be final.

Where there is an unreasonable or inexplicable delay in meeting the self-evaluation deadline the performance management cycle will cease and the member of staff must be transferred to the school's capability procedure. It is the responsibility of each member of staff to ensure their own performance management cycle is conducted in accordance with this policy, to seek confirmation of their team leader and to raise any concerns or obstacles that arise at the earliest opportunity. Where difficulties remain

any member of staff affected is required to put their concerns in writing to their team leader, line manager and eventually the Headteacher; any failure to do so may result in a determination that the current performance management cycle has been suspended or is unsuccessful. Staff are required to demonstrate a sufficient degree of self-management, common sense and initiative to sustain their own performance management annual process to reach the required standard to meet this fundamental generic objective.

Stage 1: Planning - Each teacher and member of support staff must discuss and agree objectives with their team leader and record these in an individual plan (*an example of a blank individual plan is attached at Appendix B*). Objectives should be challenging but realistic and take account of the individual's job description and their existing skill and knowledge base.

*For existing members of staff the team leader **must conduct the Stage 3 – Review before proceeding to Stage 1 for the new performance management cycle**. For new members of staff starting their first cycle at the school it may be appropriate to consider any relevant authorised objective information that is accessible from their immediate former employer. **This decision is at the sole discretion of the Headteacher.**

There can be no hard and fast rule about how many objectives there should be but we expect a minimum of three and no more than 5 or 6 to be agreed. Agreeing objectives does not mean itemising every activity but picking out key expectations and yardsticks. The range of objectives should match the nature of the job, including leadership or management areas as appropriate. Where someone has a wide range of managerial duties, objectives might focus on specific areas of this work.

Teacher objectives must cover pupil progress as well as ways of developing and improving teachers' professional practice. Leadership group staff and those with moderate or significant management allowances must have primary objectives relating to their additional responsibilities. The Headteacher's and the objectives of other senior leaders such as DHTs/Directors/AHTs and Pastoral Phase Leaders must cover school leadership and management, pupil progress and other institutional objectives.

A proportionate balance between leadership/management and teaching objectives must be determined dependent on the level of seniority of the post holder. Staff at Director/Phase Leader level or above would not normally have a discrete personal teaching objective but would be required to meet the minimum standards for an accomplished teacher or higher for a successful performance management review. With respect to middle and more senior managers, Team or Group targets will always take precedence over personal ones i.e. for HODs, 2I/Cs, Key Stage & Progress Co-ordinators, both Team and personal teaching objectives must be met for a successful review. For example, a HOD or 2I/C who achieved a +0.5 Progress 8 score overall for his/her own classes where the department had a negative Progress 8 score would usually be expected to be unsuccessful because they would not have met their Team management target. Generic team and individual appraisal targets set by the SMT/Governors are attached as Appendix E for information and to inform the setting of individual and management targets which may be different or personalized i.e. lower or higher. Generic targets are normally determined by the end of the Autumn term

each year. Where this does not occur the targets for the previous year may be used as the basis for initial discussions.

We will adopt the following principles in discussing objectives:

- The team leader should ensure that the teacher/member of support staff understands what his or her objectives involve, is in a position to achieve them or they are deemed reasonable and comparable, knows what they need to do to achieve them and understands when and how they will be reviewed;
- That objectives are written clearly and concisely and are measurable (SMART);
- That objectives focus on issues/matters over which a teacher/member of support staff has direct influence/control and take into account fully the wider socio- economic, cultural and other external influences on pupils; and
- That objectives for each teacher/member of support staff should relate to the objectives in the school development plan, key school targets and any departmental or team plans in addition to his/her own professional needs;
- The Career Stage Expectations for Teachers (see Appendix D).

The team leader should record the objectives which will apply for the review period. These should be jointly agreed if possible. However, the team leader makes the final determination. If there are any differences of opinion about the objectives the teacher or member of the support staff may add comments to the written record of objectives. If the Headteacher and the governing body representatives are unable to agree objectives, the governors appointed to review the performance of the Headteacher should set and record the objectives. The Headteacher may add comments to the written record of objectives.

Professional development opportunities are often needed to support agreed objectives, to develop strengths and address areas for development or professional growth. These cannot and must not be finalised until authorised by the designated senior leader or a Headteacher. The development page of the individual plan can be used to record action.

Stage 2: Monitoring Progress - The teacher, member of support staff and team leader will keep progress under active review throughout the year using classroom observation, work review and other relevant information. They must discuss any supportive action needed and keep personal development plans up-to-date. Reasonable modifications may be made as appropriate but the dates and rationale must be noted and approved by the Headteacher or designated senior leader.

The team leader can consult the teacher or member of support staff before seeking to obtain information, written or oral, relevant to the teacher's or member of support staff's performance from other people not involved in their line management or day-to-day work.

Classroom observation is accepted good practice with a minimum of three observations

each year required by this policy. It is not a requirement to observe Headteachers with teaching responsibilities. In our school we have agreed the team leader will undertake classroom observation sufficient to make an informed judgement. It is reasonable to set a maximum of six hours for lesson observations for all aspects of performance management throughout the year i.e. once each half-term (which requires approximately two obligatory hours self-selected video recorded whole or part lesson observations to be uploaded on to the school's online performance management/appraisal systems or for it to be retained separately). Similarly, a minimum of one hour of self-selected video recorded lessons must be uploaded or retained for appraisal purposes – this may be the same or different to that used for performance management video recordings. However, in exceptional circumstances, where an OFSTED report declares the school either to be in need of Special Measures or subject to Serious Weaknesses, or in the case of an individual teacher becoming subject to capability procedures, additional observations or reviews may be necessary in accordance with that policy.

In planning observation, work or management reviews we will follow these principles:

- Successful observation or review requires preparation and training, and a clear understanding on the part of the teacher or member of support staff and team leader of its purpose;
- The nature of the observation or work review will depend on its purpose;
- It is important that the observer ensures that the lesson or activity under review proceeds in as normal an atmosphere as possible;
- Full, constructive and timely feedback offers an opportunity to discuss what went well, what might be done better or differently next time. When giving feedback, the team leader should take into account the range of activities carried out by the teacher, member of support staff or manager and the time spent on each activity.

We will normally use the standard pro forma for lesson observations as attached at Appendix B or other SMT authorised form. Copies should be kept by the teacher and the team leader and uploaded on to the school's online performance management system for such purposes.

Stage 3: Review - Each teacher and member of support staff will discuss, evaluate and review with their team leader their annual performance with respect to their preceding performance management cycle's agreed objectives (*an example of a blank individual plan is attached at Appendix B*) and the team leader will formally record his/her determinations on the Annual Review Statement. Please note that all Annual Review Statements are subject to quality assurance and ratification/confirmation by the Headteacher or other designated senior leader on behalf of the Headteacher. The Headteacher has the authority to direct the named team leader to conduct a further evaluation/review or to assign a new team leader to conduct a fresh review to a greater or lesser extent. Such intervention may occur to ensure parity of outcomes and equity of treatment with respect to performance management determinations across the school i.e. comparability, equal opportunities and fairness are fundamental components of our performance management policy.

7. Managing Weak Performance

Good management, with clear expectations and appropriate support, will go a long way towards identifying and handling weaknesses in 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, capability or disciplinary matters including dismissal.

8. Confidentiality

The individual plan and the review statement are personal and confidential documents and should be kept on the School's online Performance Management and Appraisal system. The principles and provisions of the Data Protection Act 1998 should be followed at all times by those who have access to the documents including GDPR.

Unauthorised access to personal information on the School's online Performance Management and Appraisal system will be considered a disciplinary offence.

9. Access to outcomes

The teacher or member of support staff, the designated team leader and the Headteachers are the only persons authorised to have direct access to personal staff information, at the appropriate level, on the School's online Performance Management & Appraisal system.

Team leaders are not permitted to retain copies of Performance Management data regarding individuals (*hard copies/electronic copies*) other than the objectives set, timescales involved, milestones and deadlines. Such information must be kept securely in accordance with GDPR. It is an individual member of staff's responsibility to retain and upload online the Annual Review Statement signed by the team leader for future review.

Performance management Information related to a Headteacher will not be uploaded or retained on the School's online Performance Management & Appraisal system. Such data will be retained by a designated advisor and/or the Chair of Governors.

Information about performance reviews should be made available as listed below:

- The Headteacher should ensure that individual training and development needs are reflected in the school development plan and the programme for professional development;
- The Headteacher should ensure that approved training and development needs from the review statement are given to the person responsible for training and development at the school;
- The Headteacher should report annually to the Governing Body on performance management in the school, including the effectiveness of the performance management procedures in the school, training and any generic development needs of teachers and support staff;

- Information on staff performance management uploaded onto the School's online Performance & Appraisal system must be made available to Governors for the purpose of conducting performance and appraisal reviews as outlined in the School's Pay & Appraisal Policy and authorised third parties such as OFSTED.

The Headteacher should ensure that staff review statements are uploaded and retained on the School's online Performance Management and Appraisal system for at least three years.

10. Complaints

The Review Process

If staff are dissatisfied with their Annual Review Statement they must request a review in writing to the Headteacher within 7 calendar days of receiving their Annual Review Statement:

Teachers and Support 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 Headteacher. Where the Headteacher (Operational) is the team leader, the teacher can raise the issue with the Headteacher (Executive) which may be referred to the Chair of Governors if deemed appropriate.

The Headteacher can record his/her dissatisfaction with aspects of the review on the review statement. Where these cannot be resolved with the appointed governors, S/he can raise concerns with the Chair of Governors. Where the Chair of Governors has been involved in the review process, the governing body should appoint one or more governors who have not participated in the Headteacher's review to act as review officer. No governor who is a teacher or staff member can be involved in performance review of a headteacher.

The Review Officer (*who could be a Headteacher, the Chair of Governors or the governors appointed by the Governing Body*) will investigate any complaint and take account of comments made by the job holder. The review officer should where possible conduct a review of the complaint within 10 working days of referral. S/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, or in a Headteacher's case the designated appointed governor, 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. Where a new review is ordered new governors will be appointed to carry out the review of a Headteacher. For teachers, the Headteacher will appoint a new team leader. Any new review or part review ordered should be conducted within a further 15 working days where possible.

11. Evaluation of the policy

The Headteacher shall provide an annual oral/written report to the Governing Body on how effective the performance management procedures have been.

As a school committed to ensuring that individual teachers, support staff, teams and the school continues to improve, the Governing Body and the Headteacher will check that

effective and challenging objectives are set, that all reviews where possible are completed on time and the assessment of performance is consistently applied in the school. Governors will evaluate the effectiveness of the policy in helping to improve standards of teaching, learning and outcomes.

As part of our ongoing commitment, the Governing Body and the Headteacher will update and amend the documentation and the process as required, after consultation with staff, to incorporate any major changes introduced either by the DfE or the school to ensure that the policy is up-to-date and effective in our school.

12. Standardised Documentation

Copies of all Standard Documents, *which are normally to be* used - *the* individual plan, which includes the review statement and *the* classroom observation form, can be found attached in the Appendices to this document, online and on the staff intranet.

Electronic copies of all Standard Documents can be located on the School's online Performance Management & Appraisal system. Documents can be completed, digitally signed and stored on this system using the 'Online Forms' function or similar.

Appendix A

The Governing Body

- Must determine the procedures for the performance review of school teachers and support staff at the school.

The Headteacher

- Will be responsible under The School Government Regulations for overseeing the implementation of the School's Performance Management Policy at a global level and may be asked by the Governing Body to draft the policy for consultation with staff and agreement by the Governing Body.

Is responsible for:

- Appointing an appropriate team leader for each teacher and member of support staff, to carry out their performance review;
- Deciding on the exact timing of the performance review cycle for teachers and support staff;
- Deciding on the exact length of the first performance review cycle for teachers and support staff;
- Providing a copy of a teacher's or member of support staff's performance Review Statement to any review officer, including the objectives relevant to that statement;
- Ensuring that current objectives, evidence and other relevant information are made available to a teacher's or member of support staff's new team-leader, if there is a change of reviewer.

Must:

- Provide an Annual Report (oral/written) on performance management in the school to the Governing Body. This may be done as a confidential item. It should incorporate a report on the operation of performance management in the school, the effectiveness of the school's performance management procedures and the training and development needs of the teachers and support staff;
- Provide whoever is responsible for planning and co-ordinating teachers' and support staff training and development in the school with sufficient information from staff performance review statements to enable their agreed training and development needs to be met;
- Keep teachers' and support staff performance review statements secured online until at least three years after the next performance review statement has been finalised;
- Review complaints by teachers and support staff about their performance review statement, where they are not the team leader;
- Enable online access to staff Performance Review Statements and other relevant information for those teachers and support staff who are their team leaders;
- On request, provide (online) access to the Performance Review Statement to those governors who are responsible for taking decisions in relation to appraisal progression and pay, who may take account of this when making such decisions;
- On request, enable access to the Performance Review Statement for a teacher's or

member of support staff's new team leader.

The Headteacher as job holder

Must:

- Meet with the appointed reviewers and external adviser (as appropriate) to agree objectives at the start of the performance review cycle;
- Meet with the appointed reviewers and external adviser (as appropriate) to review performance at the end of the performance review cycle, including achievement against objectives.

May:

- Add written comments to the record of objectives set by his/her reviewers;
- Add written comments to the performance review statement or lodge an appeal against the performance review statement, within 10 working days of receipt from the governors.

The Team Leader

Must:

- Take responsibility for ensuring the performance management cycle for their reviewees operates in accordance with this policy;
- Meet with each of the teachers or members of support staff for whom they will be the reviewer before or at the start of the performance review cycle to plan and prepare for performance review and discuss setting objectives;
- Seek approval from the designated senior leader(s) and/or Headteacher before finalising/agreeing an objective with the reviewee where there are cost and/or Directed Time, cover implications such as off-site training courses/INSET;
- Record proposed objectives in writing and allow the job holder to add written comments if they wish. Teacher objectives must include those relating to developing and improving teacher's professional practice and pupil progress;
- Receive approval from the designated senior leader and/or Headteacher prior to finalising/agreeing objectives to ensure fairness and equity of challenge across the school;
- Monitor work performance against set objectives for all reviewees throughout the year, observe teachers teaching in the classroom and review the effectiveness of leadership and management where applicable at least three times during the review cycle;
- Meet with the reviewee at the end of the performance review cycle to review performance and identify achievements, including assessment of achievement against objectives, and to discuss and identify professional development needs/activities;
- Write a Performance Review Statement and upload this online for the reviewee within 10 working days of the final performance review meeting, and allow 14 calendar days for the job holder to add written comments;
- Upload the completed performance review statement on to the School's online

Performance Management and Appraisal system for the attention of the Headteacher.

- ***Not make any appraisal or performance related pay recommendations for staff under this Performance Management Policy. Any such recommendation will be removed/deleted and potentially the team leader changed.**

May:

- Consult the reviewee before seeking to obtain information, written or oral, relevant to the teacher's or member of support staff's performance from other people not involved in their line management or day-to-day work.

The Job Holder (School teachers who are not Headteachers/Support Staff)

Must:

- Take responsibility for confirming their team leader identity and ensuring their performance management cycle operates in accordance with this policy;
- Raise any concerns with their team leader, line manager or the Headteacher at the earliest opportunity, in writing, where they believe issues outside of their control will prevent their performance management cycle being completed in accordance with this policy;
- Meet with their team leader before or at the start of the performance review cycle to discuss setting objectives;
- Either agree objectives with the team leader or add written comments to the objectives recorded by the team leader;
- Meet with their team leader at the end of the performance review cycle to review performance and identify achievements, including assessment of achievement against objectives, and to discuss and identify professional development needs/activities;
- Upload their Annual Review Statement signed by their team leader and all supporting documentation and evidence on to the School's online Performance Management and Appraisal system;
- ***Must not make any reference to appraisal or performance related pay under this procedure. Any such reference will be removed/deleted.**

May:

- Add comments to the Performance Review Statement or complain about their performance review statement within 7 calendar days of receipt from the team leader.

Performance Review Cycle

The length of the performance review cycle shall normally be one year. In the first year of operation only, the performance review cycle for teachers may be as short as 9 months, or extended up to a maximum of 18 months. Where a teacher changes jobs significantly within the school, the performance review cycle may be less than a year as the teacher should keep within the same school cycle where possible and reasonable.

Alternatively, the targets/objectives may be amended or modified in-year with the advance approval of the Headteacher. Where a teacher or member of the support staff is new to the school mid-year, the performance review cycle may be less or more than a year as the member of staff will move onto the new school cycle at the sole discretion of the Headteacher.

Complaints

Where a complaint is made about the performance review statement, the review officer is responsible for reviewing the complaint. This should be carried out within 10 working days of receiving a complaint. The review officer may order the performance review statement to stand with or without observations or work review, may amend the statement, or order that parts of the review or the whole review be repeated. Where a new review or part review is ordered, this should be carried out within 15 working days.

The information contained in Appendices A, B, C, D & E etc. is obtainable via the School's online Performance Management and Appraisal system and the Staff Intranet. Staff should not be restricted by the spaces shown on the hard copy format. If the pro formas are completed by hand, additional paper should be used as appropriate. However, all relevant information should be uploaded on to the School's online Performance Management and Appraisal system.

Appendix B: Individual Plan for Annual Performance Management (PM) Cycle

Name: _____

Job Title: _____ Date Started Current Job:

Length of PM Cycle (*insert dates*): from _____ to _____

Main responsibilities:

Objectives:
SMART Success Criteria

Continue on additional page as required...

Initial Evaluation/Review carried out by:

Date of initial review: / /
review: / / to / /

Period covered by

Second/Further Evaluation/Review carried out by:

Date of Second/Further review: / /
review: / / to / /

Period covered by

Confirmation of Review by Headteacher or designated Senior Leader:

Date: / /

(A specialised or different pro forma/format may be used for Headteachers and other senior leaders)

Name of Postholder: _____

Objectives (including examples of development, training, support and interim milestones, as appropriate. Please link to following page as required)	Notes from In-Year Discussions	Notes from end-year discussions

Development and training needs to support achievement of objectives requiring authorisation by designated senior leader/headteacher

Development and Training (including target knowledge and skills, and target dates and resources to support the objectives)	How to be Achieved	Date Completed

Comments:

Objectives agreed by:

Postholder: _____

Date: _____

Team Leader: _____

Date: _____

Senior Leader/Headteacher Authorisation: _____ **Date:** _____

Appendix C

Lesson Observation: How to use this form

Observing teachers in the classroom is an important part of improving the effectiveness of teaching and learning.

There are three stages:

1. Collecting evidence;
2. Drawing conclusions based on the evidence; and
3. Giving feedback.

Collecting Evidence: Before the observation, the observer and teacher should be clear about the context of the lesson, the activities planned and the learning objectives. This should be done either through discussion or from the lesson plan.

A time/events log might be used to record events during the lesson.

Drawing Conclusions: The observation form covers eight aspects of effective teaching, with a fuller description of each in the guidance sheet. Most if not all should apply to any lesson. The description should help both teacher and observer in assessing the quality of teaching and learning.

The observer then considers for each aspect whether it has been shown to a satisfactory standard, or whether further development is needed or whether the aspect is not applicable or there is not enough evidence to assess it. Conclusions should always be supported by evidence.

Giving Feedback: The teacher and observer should discuss the conclusions as soon as possible, with the observer giving full and constructive feedback. The teacher should be given the opportunity to record any comments.

There is further guidance in the OFSTED Handbooks for inspecting secondary, primary and special schools, which include information on judging the quality of teaching in lessons, feedback and self-evaluation.

MONITORING PROGRESS: CLASSROOM OBSERVATION CHECKLIST

Date of Observation: _____ Class Observed: _____

Met

Further
development
required

1. Lesson preparation and planning

- The lesson was appropriately structured
- It was part of a sequenced and planned programme
- The aims of the lesson were clear
- Adequate and suitable resources were available
- The material was differentiated as appropriate

2. Subject knowledge

- The teacher displayed a good command of the subject material

3. Lesson presentation and teaching methods

- Suitable approaches were chosen from the Options available
- The material was well presented
- The pace was appropriate
- The teacher adapted the approach where necessary

4. Communication and motivation skill

- The teacher's language was appropriate to the pupils' ability
- The pupils were actively involved and on task

5. Discipline

- The teacher displayed a positive approach, encouraging and rewarding good behavior. Where pupil behaviour was inappropriate, the Teacher dealt with the situation effectively

6. Effective use of homework

- Homework was set and marked in accordance with the school's homework policy
- Appropriate feedback on homework was given

7. Classroom organisation

- The classroom was well organised
- Materials were well presented
- An appropriate environment conducive to learning was created

8. The teacher's objectives for pupils' learning were met

CLASSROOM OBSERVATION FEEDBACK RECORD

Date of feedback: _____

Date of observation: _____

Class observed: _____

Strengths

Areas for development

Teacher's comments

Observer: _____(signature)

Teacher: _____(signature)

ANNUAL REVIEW STATEMENT

Date of Review Meeting: _____

Teacher: _____ Team leader: _____

Objectives:

Met , Further development

(✓)

(✓)

Areas of particular strength (specify)

Areas to be developed

Support and resources to be provided by school (specify)

Teacher's comments

The content of this record has been agreed by:

Teacher: _____ (signature) Team leader: _____ (signature)

Date of receipt of the completed review statement by the teacher: _____

Senior Leader/Headteacher Confirmation: _____ **Date:** _____

Appendix D

Career stage expectations/Professional skills level descriptions

Professional Area	Teacher Standard	NQT	Teacher	Established Teacher	Accomplished Teacher	Expert Teacher	Exceptional Teacher
Band & Point Range		Band A M1/K1	Band A M2-3/K2-3	Band B M4-5/K4-K9	Band B M6/K10	Band C E7-8/K-E1/2	Band C E9/K-E3
Teaching Practice	1.1a; 1.2b, c, e; 1.3a, c; 1.4a,b, c; 1.5, 1.6a, 1.7a, b, c; 1.8c, 2.1b, d; Preamble	All teaching satisfactory, majority good or better		Very large majority of teaching good or better (nothing less than satisfactory).	All teaching at least good.	All teaching good; some outstanding.	All teaching good; much outstanding.
Achievements & Outcomes	1.1b; 1.2a,b,c; 1.5a, 1.6c, d; Preamble	The large majority of pupils achieve in line with school expectations with appropriate additional support		Almost all pupils (at least 96%) achieve in line with school expectations without additional support.	Almost all pupils (at least 96%) achieve in line with school expectations, some exceed them	Almost all pupils (at least 96%) achieve in line with school expectations and many or most exceed them.	
Relationships	1.1a; 1.6d; 1.7d; 1.8b, c, e; 2.1a, c, d; Preamble	Positive working relationship with pupils, colleagues and parents		Positive working relationship with pupils, colleagues and parents which are securely focused on improving provision for pupils	Professional relationship with pupils, colleagues and staff lead to excellent class provision and outcomes.	Play a proactive role in key stage or departmental teams to improve provision and outcomes	Plays a proactive role in school wide teams to improve provision and outcome.
Development	1.2d, e; 1.3 a, b, d, e; 1.4e, 1.5b, c, d; 1.6a, 1.8d, 2.1b, 2.3; Preamble	Develop professional practice in line with advice from more experienced colleagues		Take a proactive role in accessing relevant support and professional development from colleagues	Fully competent practitioner able to keep up to date with changes and adapt practice accordingly	Plays a proactive role in the professional development of colleagues within department through, for example, coaching and mentoring, providing advice and feedback	Plays a proactive role in the professional development of colleagues across the school and outside agencies through, for example, coaching and mentoring, providing advice and feedback
Conduct		Meets the standards for professional conduct set out in the Teacher Standards					