



**Tudor Grange Academies Trust**

## **Appraisal Policy (Teaching and Executive Staff)**

|                                |                                                               |
|--------------------------------|---------------------------------------------------------------|
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| 14.09.2026   | 5.1     | 'TGAT' updated to 'the Trust' throughout. Removal of Section 10 and subsequent renumbering. Update to paragraphs 3.1, 4.1, 8.2. Update to section 10 and Annexe 1. |

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## **1 Purpose**

- 1.1 This policy sets out the framework for a clear and consistent assessment of the overall performance of teachers, Principals and members of the executive. It aims to support their development within the context of the school's plan for improving educational provision and performance to enhance pupil achievement, and the standards expected of teachers.
- 1.2 Appraisal in all Tudor Grange Academies Trust (the Trust) schools will be a supportive and developmental process designed to ensure that all teachers have the skills and support they need to carry out their role effectively. It will help to ensure that teachers are able to continue to improve their professional practice and to develop further as teachers.
- 1.3 This policy applies to the Principal, Executive and to all teachers employed by the school, except those on contracts of less than one term, those undergoing induction (i.e. ECTs) and those who are subject to capability proceedings as covered in the separate Trust Capability Procedure.
- 1.4 All appraisal activities will take place within directed or normal working time. The school will ensure that adequate directed time is allocated to appraisal activities. Meetings may be held virtually should health and safety reasons necessitate.

## **2 The appraisal period**

- 2.1 The appraisal period will run for twelve months, normally from 1 September to 30 August. Reviews take place prior to 30 September.
- 2.2 Teachers who are employed on a fixed term contract of less than one year will have their performance managed in accordance with the principles underpinning this policy. The length of the period subject to appraisal will be determined by the duration of their contract.

## **3 Appointing appraisers**

- 3.1 The Principal will be appraised by the appropriate Executive Director. The Principal, after consultation, will decide who will appraise the other teachers. The CEO will decide who will appraise members of the Executive and Central School Improvement Team. All appraisers of teachers other than Principals will have appropriate, relevant and current teaching experience. All appraisers should have Qualified Teacher Status, and the appraiser will receive sufficient and appropriate training before undertaking the role. The appraiser should have equivalent or greater level of responsibility than the teacher they are appraising and normally have line management responsibility. Where it becomes apparent that the appraiser appointed by the Principal will be absent for the majority of the appraisal cycle, the Principal may perform those duties themselves or delegate those duties to another teacher for the duration of the absence.
- 3.2 Senior leaders will be appraised by the Principal. The Principal will be appraised by the Executive Director of Standards (primary or secondary, as appropriate).
- 3.3 Where possible, alternative appraisers will be offered to teachers where there is a genuine and valid objection or the appointed appraiser is not available due to long term sickness. This will be confirmed with the appraisee at the beginning of the process.

## **4 Setting objectives and reviewing performance in the cycle**

- 4.1 The Principal's objectives will be set by the appropriate Executive Director and the Deputy CEO. Executive team members' objectives will be set by the line manager: the CEO or the Deputy CEO, and the CEO's objectives will be set by the Board of Trustees. All teachers in the Trust schools are expected to meet Teachers' Standards; this is one of their two objectives. The Teachers' Standards document is used throughout the year to sustain high quality conversations about professional development. There are two checkpoints within the academic year. At each checkpoint Curriculum Leaders/Lead Teachers gather quality assurance information and update the school's professional development tracker. Teachers will access all information recorded about their professional development in the tracker. At the mid-year review, the reviewee and reviewer will agree areas where standards are being met and any areas where further development is required. The reviewer can set specific objectives in this meeting that are designed to support the reviewee to meet standards by the end of the year. The final review meeting will review the progress made on the objectives identified in the mid-year review and determine a final outcome of "met" or "not met".
- 4.2 Pupil progress targets are established at the beginning of the year and these are published to all staff. In the mid-year review meeting, the progress data available for all groups is reviewed. Curriculum Leaders or Lead teachers may establish key objectives for groups that appear to be underperforming at this stage. Clear next steps and development areas will be recorded on the mid-year review pro-forma.
- 4.3 The appraiser and appraisee will seek to agree the objectives but where a joint determination cannot be made the appraiser will make the determination. The appraisee may request moderation and should this be unsuccessful then the appraisee will be given the opportunity to append comments alongside their objectives. Each school must agree its own moderation process. Objectives may be revised by agreement if circumstances change.
- 4.4 For the final review meeting, the school will provide any terminal examination groups' data. All relevant progress data will be reviewed, including any actions agreed at the mid-year review. Where pupil progress targets have not been met, the reviewer will allow the reviewee to present reasons for this. No formal or written evidence is required. The focus will be on what the teacher has done to support pupil progress rather than the raw outcomes.
- 4.5 The Trust will provide standard templates for documenting this evidence (see annexes).
- 4.6 Current Teachers' Standards provide the context in which, through professional discussions, objectives are set, CPD needs identified, success criteria defined and the nature and extent of any required observations planned. The Teachers' Standards should not be used as a checklist but should inform the setting of targets which are used throughout the year to ensure that standards will be met and can be evidenced in the review. Assessment against the Teachers' Standards will start from the premise that all teachers are meeting the Teachers' Standards and they will be assessed as meeting the standards unless there is clear, compelling evidence to the contrary.
- 4.7 The appraiser will take into account the effects of an individual's circumstances, including any disability, when agreeing objectives or evaluating performance. For example, this might include a reasonable adjustment to the objectives set. Also, when staff return from a period of extended absence, objectives may be adjusted to allow them to readjust to their working environment.

## **5 Observation**

- 5.1 The Trust believes that observation of classroom practice and other responsibilities is important both as a way of assessing teachers' performance to identify any particular strengths and areas for development they may have and of gaining useful information which can inform school improvement more generally. All observation will be carried out in a supportive fashion and follow the procedure as set out in Appendix 4.
- 5.2 Teachers (including the Principal) who have responsibilities outside the classroom should also expect to have their performance of those responsibilities observed and assessed.

## **6 Development and support**

- 6.1 Appraisal is a supportive process which will be used to inform continuing professional development. The school wishes to encourage a culture in which all teachers take responsibility for improving their teaching through appropriate professional development. Professional development will be linked to school improvement priorities and to the ongoing professional development needs and priorities of individual teachers.

## **7 Feedback**

- 7.1 Feedback will happen as a matter of course throughout the appraisal period. In response to feedback throughout the year any further action or changes that need to be made will be decided and agreed by the appraiser and appraisee. The mid-year review is the formal checkpoint where any actions required are recorded.

## **8 Relationship to capability**

- 8.1 Teachers experiencing difficulties will be supported through the appraisal process. Teachers will be made aware of concerns and supported to achieve the required standards during a period of informal support lasting approximately 4 to 8 weeks, depending on severity of concerns and experience. We support our teachers in a number of ways, for example:
- Time for shared planning activities
  - Peer to peer observation
  - Team teaching with experienced practitioners
  - Counselling sessions
  - Visits to other schools

The above list is not exhaustive.

- 8.2 Where it proves necessary to move management of performance to the capability procedure, the employee must be informed that the appraisal process is ending and they are invited to a meeting under the capability procedure at which a further period of informal support will be agreed. Prior to embarking on a formal capability procedure, the Executive Director, Deputy CEO and Chair of the LGB (in the case of Principals) or Principal (in case of other teachers) must be satisfied that appropriate support and guidance have been provided, sufficient opportunity to improve has been given, and the required standards have not been met. .

## **9 Annual assessment**

- 9.1 Each teacher's performance will be formally assessed in respect of each appraisal period.

- 9.2 This assessment is the end point to the annual appraisal process, but performance and development priorities are reviewed at an interim meeting, the mid-year review.
- 9.3 Priorities may need to be reviewed if an appraisee's circumstances or responsibilities change. In such cases a written addition to the mid-year review should be made. The appraisee, will be given the opportunity to add written comments to the mid-year review and final review statements.
- 9.4 Teachers will receive their final review appraisal report by 30 September. The final review summary template is at Appendix 1 and will include:
- details of the teacher's objectives for the appraisal period in question;
  - an assessment of the teacher's performance of their role and responsibilities against their objectives;
  - an assessment of the teacher's training and development needs and identification of any action that should be taken to address them;
  - a space for the teacher's own comments.
- 9.5 The assessment of performance and of training and development needs will inform the planning process and objectives for the following appraisal period.
- 9.6 Applications for progression to the Upper pay scale should be made in line with the Pay Policy and STPCD requirements. Staff are responsible for ensuring their applications are submitted by 30 September each year and teachers should discuss their intentions with their line manager well in advance. Line managers are expected to coach and prepare staff through the appraisal process to optimize the chances of success.
- 9.7 Progression through the upper pay scale should be considered biennially following consultation with your line manager. Assessments are made biennially to ensure any performance can be viewed as sustained. Eligible staff who do not wish to be considered for progression should indicate this to their appraiser.

## **10 Recommendation**

- 10.1 The Trust has removed performance-related pay. Accordingly, staff will receive one automatic salary increment annually, unless they are at the top of their pay band, they have less than 4 months service with the Trust, or are subject to a formal capability process.
- 10.2 To be eligible for consideration for an annual incremental pay progression, an employee must have completed a minimum of four months' continuous service with the Trust by the date on which pay progression decisions are determined.
- 10.3 Employees who have commenced employment with the Trust less than four months before the pay progression determination date will not be eligible for an incremental increase in that appraisal cycle and will receive progression through the next annual appraisal and pay review process.
- 10.4 Cost of living awards are usually applied early in the autumn term and backdated to the 1st September, all staff are informed through an email from the CEO when the Board has met and approved these.
- 10.5 Performance progression awards are usually applied in October and backdated to the 1st September.

- 10.6 All appraisals are completed by a Trust deadline, usually 30<sup>th</sup> September. Immediately after the deadline has passed, the Executive HR Director and CEO sample appraisal documentation from all schools and survey a random selection of staff to quality assure the appraisal process. The Executive HR Director reports back to the Finance and Personnel Committee (FPC) the findings of this exercise.'
- 10.7 The Review Committee will meet to consider any recommendations for salary progression that exceed the automatic annual increment and to review recommendations relating to threshold applications.
- 10.8 Where a threshold application has been submitted, the Principal will, prior to making a recommendation to the Review Committee, inform the employee of the recommendation being made and the date on which the Review Committee will consider it.
- 10.9 A teacher who is dissatisfied with a threshold recommendation has the opportunity to discuss the recommendation informally with the appraiser or Principal before the recommendation is actioned.
- 10.10 Whilst there is no right of appeal to the Principal's recommendation, if the employee does not agree with the recommendation to be made, then they may provide a written statement to the Clerk of the Pay Body which will be provided to the Review Committee to consider alongside the recommendation and the employee will be invited to attend a formal meeting with the Review Committee.
- 10.11 The statement provided by the employee must indicate the reason/s why they disagree with the recommendation and must fall within one or more of the following:
- That the recommendation:
- incorrectly applied any provision of the appraisal policy
  - in the case of a teacher, failed to have proper regard to the STPCD statutory/contractual guidance
  - failed to take proper account of relevant evidence
  - took account of irrelevant or inaccurate evidence
  - was biased; or
  - otherwise unlawfully discriminated against the employee
- 10.12 The employee will have a minimum of five working days' notice between the date they are informed of the recommendation and the date of the meeting of the Review Committee to provide this written statement. The Clerk of the Pay Body will provide the Principal with a copy of the written statement submitted by the employee prior to the meeting of the Review Committee.

## **General Principles Underpinning this Policy**

### **Confidentiality**

The appraisal process will be treated with confidentiality. However, the desire for confidentiality does not override the need for the Trust to quality-assure the operation and effectiveness of the appraisal system.

Quality assurance will be undertaken as part of monitoring and evaluation.

## **Monitoring and Evaluation**

FPC will monitor the operation and outcomes of performance management arrangements.

The HR Director will provide the FPC with a report on the operation of the school's appraisal policy annually. The report will not contain any information which would enable any individual to be identified. The report will include:

- an evaluation of the operation of the appraisal policy;
- an overview of the effectiveness of the school's appraisal procedures;
- a summary of staff training and development needs;
- an assessment of the impact of the policies on groups of staff, including those with protected characteristics.

Reports are shared and discussed with the recognised trade unions when requested.

## **Consistency of Treatment and Fairness**

The LGB is committed to ensuring that the appraisal process is fair and non-discriminatory. The HR Director's report must confirm that the appraisal process complies with the Equalities Act 2010.

The Principal will also report on whether there have been any appeals or representations on an individual or collective basis on the grounds of alleged discrimination under any of the protected categories covered by the Equalities Act 2010.

## **Appeals**

At any point in the appraisal process all staff have a right of appeal in respect of application of the policy or any entry in their planning and review statements. This is clearly set out in the Trust Pay Policy.

The grounds for the appeal will determine the relevant appeal process to be used.

## **Long Term Absence**

The appraisal process may need to be adjusted if long term sickness absence or maternity leave affects the achievement or progress towards the appraisal objectives. In such cases a review will take place.

## **Maternity Leave**

If the reviewee has taken maternity leave for part of the year, then the appraisal process will be adjusted to review performance during any worked period within the appraisal year.

## **Retention**

The LGB and Principal will ensure that all written appraisal records are retained in a secure place for six years and then destroyed. The appraisee should retain their own copy for the same period.

**Access to Documentation**

All staff will have access to documentation relating to school improvement and any other documents and procedures to which this policy relates. However, review statements are confidential to the Principal, the appraiser and the appraisee.

**ANNEXE 1 Final Appraisal Review - All Teaching and Executive Staff**

Staff Name .....

Role .....

Date .....

| (Please put X in appropriate box)                                            | N/A | Yes | No |
|------------------------------------------------------------------------------|-----|-----|----|
| Objectives fully met                                                         |     |     |    |
| Does reviewee intend to make a Threshold application                         |     |     |    |
| Does reviewee wish to be considered for progression through UPS (Biennially) |     |     |    |
| Wellness Action Plan discussed                                               |     |     |    |
| Trust Professional Learning and Development Pathways discussed               |     |     |    |

**REVIEW SUMMARY (completed by reviewer)****Evidence of leadership impact/qualities, mentoring or line management responsibilities during the review period: (completed by reviewer)**

**Data evidence to support review**

**NEXT STEPS / CPD OPPORTUNITIES (Completed by reviewer)**

**REVIEWEE COMMENTS (completed by reviewee)**

Signed: \_\_\_\_\_ (Reviewee)      Print name: \_\_\_\_\_      Date: \_\_\_\_\_

Signed: \_\_\_\_\_ (Reviewer)      Print name: \_\_\_\_\_      Date: \_\_\_\_\_

**ANNEXE 2      Mid-Year Development Review - All Teaching and Executive staff**

Staff Name .....

Date .....

Role .....

|                                                                              | Current Progress | Next steps/CPD | Current assessment (circle)                  |
|------------------------------------------------------------------------------|------------------|----------------|----------------------------------------------|
| Teaching standards                                                           |                  |                | Meeting<br><br>Developing<br><br>Not meeting |
| Leadership/Line management/<br>Mentoring responsibilities<br>(if applicable) |                  |                | Meeting<br><br>Developing<br><br>Not meeting |
| Pupil Progress<br>(group progress, pp etc)                                   |                  |                | Meeting<br><br>Developing<br><br>Not meeting |
| Wider standards;<br>Personal and Professional<br>conduct, flexibility etc.   |                  |                | Meeting<br><br>Developing<br><br>Not meeting |

|                    |
|--------------------|
| Reviewee comments: |
|                    |

**Signed:** \_\_\_\_\_ **(Reviewee)**      **Print name:** \_\_\_\_\_      **Date:** \_\_\_\_\_

**Signed:** \_\_\_\_\_ **(Reviewer)**      **Print name:** \_\_\_\_\_      **Date:** \_\_\_\_\_

## Professional Development Tracker

| Teacher beginning: |          |           |                               |            | 2024                | Cycle inclusion |                 | Cycle One, September- February |               |                                       |                             |                               |                                           |                                          |         |
|--------------------|----------|-----------|-------------------------------|------------|---------------------|-----------------|-----------------|--------------------------------|---------------|---------------------------------------|-----------------------------|-------------------------------|-------------------------------------------|------------------------------------------|---------|
| ID                 | Surname  | Forename  | Length of employment category | Department | Subject designation | Included in CP1 | Included in CP2 | Complete before meeting        |               |                                       | Complete in initial meeting |                               |                                           | Complete                                 |         |
|                    |          |           |                               |            |                     |                 |                 | Residual data                  | Progress data | Follows trust policies and procedures | Developmental focus         | Next step for development     | Focussed subject, year group or key stage | Engagement with professional development | Support |
| 1001               | Alonso   | Antonio   | New to Trust                  | MFL        | EBACC               | Y               | Y               | -0.84                          | -1.04         | Frequent gaps                         | Lesson structure/fidelity   | Generic pedagogy              |                                           | Less than expected                       |         |
| 1002               | Berkeley | Beatrice  | Established in Trust          | En         | English             | Y               | Y               | 0.15                           | -0.19         | Almost always                         | Explanation                 | Disciplinary pedagogy         | KS4                                       | Expected                                 |         |
| 1003               | Capulet  | Caliban   | Established in Trust          | Hi         | EBACC               | Y               | Y               | -0.78                          | -0.87         | Almost always                         | Behaviour for learning      | Generic pedagogy              |                                           | Expected                                 |         |
| 1004               | Duncan   | Demitrius | Recent to Trust               | DT         | Open                | Y               | Y               | 0.42                           | -0.15         | Almost always                         | Questioning                 | Disciplinary pedagogy         |                                           | Expected                                 |         |
|                    |          |           | Recent to                     |            |                     |                 |                 |                                |               |                                       | Questioning                 | Disciplinary pedagogy         | KS5                                       | More than expected                       |         |
|                    |          |           |                               |            |                     |                 |                 |                                |               |                                       | Questioning                 | Adapted disciplinary pedagogy | Media studies                             | Expected                                 |         |
|                    |          |           |                               |            |                     |                 |                 |                                |               |                                       | Questioning                 | Disciplinary pedagogy         | Physics                                   | Expected                                 |         |
|                    |          |           |                               |            |                     |                 |                 |                                |               |                                       | Questioning                 | Generic pedagogy              | KS3                                       | More than expected                       |         |
|                    |          |           |                               |            |                     |                 |                 |                                |               |                                       | Questioning                 | Disciplinary pedagogy         | KS5 - core maths                          | More than expected                       |         |

At each checkpoint Curriculum Leaders/Lead Teachers gather quality assurance information and update the school's professional development tracker. The professional development tracker tracks a teacher's engagement in CPD and how this is reflected in quality assurance activities.

Each teacher agrees an area of focus with their line manager and decides the CPD they will take part in to develop their focus. Each school will have key levers, which will be defined in the Teaching and Learning Policy. Each school may also have an area of focus each year depending on the needs of the pupils.

At each checkpoint, teachers will be able to provide support to others, be on track with their own teaching, require some support from another teacher or will be on a support plan.

## **ANNEXE 4      Classroom Observation Protocol for Appraisal Purposes**

The Trust is committed to ensuring that classroom observation is developmental and supportive and that those involved in the process will:

- carry out the role with professionalism, integrity and courtesy;
- evaluate objectively;
- report accurately and fairly;
- respect the confidentiality of the information gained and follow school procedures for observations.

The amount of observation for each teacher should reflect and be proportionate to the needs of the individual appraisal and will last no more than a total of three hours per appraisal cycle.

There is no requirement to use all of the three hours.

The focus and timing of observations will be communicated to staff at the beginning of each observation cycle. Schools will publish calendars that include planned quality assurance activities throughout the year.

Information gathered during the observation will be used, as appropriate, for a variety of purposes including:

- informing school self-evaluation; and
- informing school improvement strategies in accordance with the school's commitment to streamlining data collection and minimising bureaucracy and workload burdens on staff.

In keeping with the commitment to supportive and developmental classroom observation, those being observed for appraisal purposes will be notified 5 days in advance. All teachers will be given clarity about the focus, style and duration of appraisal observations.

Classroom observations will only be undertaken by persons with QTS. In addition, classroom observation will only be undertaken by those who have had adequate preparation and the appropriate professional skills to undertake observation and to provide constructive verbal and written feedback and support.

Verbal feedback will be given as soon as possible after the observation and no later than the end of the following working day.

Written feedback will be provided within five working days of the observation taking place. If issues emerge from an observation these should also be covered in the written feedback and appropriate action taken in accordance with the regulations and guidance.

Examples of lesson observation proformas are provided at Appendix 6.

## ANNEXE 5      Template responses following appraisal

Dear [Name],

Following the completion of your annual appraisal cycle and subsequent moderation, I am writing to formally confirm the outcome of your appraisal.

Based on the appraisal process, the following applies:

- That you have **successfully completed** your appraisal cycle and **met the agreed objectives**;  
**or**
- That you have **not successfully completed** your appraisal cycle and/or **did not fully meet the agreed objectives**.

As the Trust has moved away from performance-related pay, appraisal outcomes are **not linked to pay progression**. In line with the Trust's pay policy, all staff will therefore receive **one automatic annual salary increment**, unless they are subject to a formal capability process or are at the **top of their pay scale**, in which case no further progression is available.

Where applicable, and where a recommendation relates to progression beyond the automatic annual increment or to a threshold application, this will be considered by the Review Committee at its meeting on **[XX October 20XX]**.

Should you wish to discuss the outcome of your appraisal or any aspect of this letter informally, please contact my PA at the earliest opportunity to arrange a suitable time. If, following such a discussion, you remain dissatisfied, you may follow the procedure outlined in the Trust's pay policy.

Thank you for your continued commitment and contribution.

**Yours sincerely,**  
**Principal**

### **Top of scale**

Dear

I am writing to you following completion of the latest performance appraisal cycle. The Finance and Personnel Committee met recently to consider all performance management reviews and note that you had successfully met your targets. You are currently at the top of your scale and therefore not eligible for progression however I would like to thank you for all your hard work and the commitment you have demonstrated to the school.

### **Met Targets (Teachers not applying for progression at UPS)**

Dear

I am writing to you following completion of the latest performance appraisal cycle. The Finance and Personnel Committee met recently to consider all performance management reviews and note that you had successfully met your targets but had indicated you did not wish to progress to/through the Upper Pay scale at this time. Whilst I must respect your personal decision, I wish to reassure you of

my continued support and I look forward to discussing this further when you believe the time is right. In the meantime, I thank you for your hard work and commitment to the school.

### **Pay Progression Notification**

**Dear [Name],**

I am writing to you following the completion of the most recent appraisal cycle.

As you will be aware, the Trust has moved away from performance-related pay. In line with the Trust's pay policy, staff receive **one automatic annual salary increment**, where applicable, provided they are not at the top of their pay range and are not subject to a formal capability process.

As you are eligible for the automatic increment, I am pleased to confirm that your salary will progress as follows:

**Current level of pay and point:**

[Insert current salary and point]

**Revised level of pay and point:**

[Insert revised salary and point]

Your revised salary will take effect from **1 September 20XX** and will be reflected in your **November salary**.

Thank you for your continued contribution and commitment over the past year.

**Yours sincerely,**

**[Principal]**

### **UPS not met**

Dear

I am writing to you following completion of the latest performance appraisal cycle. The Finance and Personnel Committee met recently to consider all performance management reviews including your UPS application. I am writing to let you know that whilst they recognise the contribution you are making to the school, they felt that on this occasion they had to decline your application as you had not fully met the UPS standards.

I appreciate that this will be a disappointing decision for you and If you want to discuss this further, please contact my PA to make an appointment.

Thank you for all your continuing hard work and commitment. I very much appreciate your contribution.



## Tudor Grange Academies Trust lesson visit form

### ANNEXE 6 Lesson observation proformas

|                 |                  |                          |  |
|-----------------|------------------|--------------------------|--|
| <b>School:</b>  |                  | <b>Date:</b>             |  |
| <b>Teacher:</b> | <b>Observer:</b> | <b>Class/year:</b>       |  |
|                 |                  |                          |  |
| <b>Subject:</b> | <b>Topic:</b>    | <b>Betterment focus:</b> |  |
|                 |                  | Explanation              |  |

#### Checklist

Fill in this checklist based solely on whether or not the teacher attempts the practice described in the checklist. An NA would typically be used when you do not see any opportunities to use the behaviour – a practical lesson with no books for example, or visiting after the let's get started is complete.

| Observable behaviour linked to QFT                     | Yes | No | N/A |
|--------------------------------------------------------|-----|----|-----|
| Start of lesson – check prior knowledge                |     |    |     |
| Teacher shares what, why, how                          |     |    |     |
| Vocabulary identified on SOL is taught explicitly      |     |    |     |
| Books show evidence of sentence stacking               |     |    |     |
| Avoids long lectures or explanations with no checking  |     |    |     |
| Models are used                                        |     |    |     |
| Cold calling is used, with thinking time               |     |    |     |
| Partial/missing answers are followed up                |     |    |     |
| There are opportunities for children to apply learning |     |    |     |
| Teacher follows guidance on one-page profiles          |     |    |     |
| Teacher circulates and/or checks work of learners      |     |    |     |
| Teacher provides feedback                              |     |    |     |
| Teacher compliant with behaviour policy                |     |    |     |
| Teacher uses praise                                    |     |    |     |

#### During feedback:

Share this checklist with the person you visited and invite them to discuss any items that were marked as a 'no'. There may be well-thought out reasons for that decision that mean an NA is more appropriate.

#### Betterment focus: explanation

As you watch the lesson, use the matrix, overleaf and highlight mark on where you see behaviour in action and where you see the impact of that behaviour by, e.g., underlining or ticking

#### During feedback:

Use your completed matrix to shape a discussion with the person you visited. What did you see and not see? Based on this, the two of you will agree a single point for the teacher to reflect on and practise in the future.

#### Strengths:



**Tudor Grange Academies Trust lesson visit form**



**Signed**

**Dated**



### Tudor Grange Academies Trust lesson visit form

| Highly Effective (QFT)                                                                                                     | Teacher behaviour                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Impact:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Teachers present material in small, connected steps, explicitly linked to prior knowledge and anticipating misconceptions. | <ul style="list-style-type: none"> <li>- The teacher has <b>considered what prior knowledge is necessary</b> to access the new knowledge they are teaching in this lesson and they <b>make this connection explicit to pupils</b> to help them build and develop schema.</li> <li>- New material is presented in small, connected steps. <b>These steps are planned based on the prior knowledge that learners have so that they are manageable.</b></li> <li>- As new material is presented takes place, the <b>teacher makes use of activities or questions to support the process of transferring new knowledge to long term memory</b> before presenting subsequent information. These <b>will require learners to think about, manipulate, and process the knowledge they are learning.</b></li> <li>- The <b>teacher is aware of misconceptions and makes these explicit</b>, through their explanation or the other activities, and addresses these in their explanation or in their questioning or practice activities.</li> <li>-The teacher <b>manages extraneous cognitive load by ensuring their resources are free from distraction</b>, including slide decks where content is written as well as spoken.</li> </ul> | <ul style="list-style-type: none"> <li>- Pupils can <b>explain how the new knowledge they are learning in this lesson builds upon their prior knowledge</b></li> <li>- Pupils can relate to the examples their teachers have provided and <b>explain how they exemplify the learning.</b></li> <li>- Pupils <b>typically have a high success rate with questioning and practise tasks</b> because the new knowledge they are manipulating has been clearly explained, and in ways that manage their cognitive load.</li> <li>- Pupils <b>can explain common misconceptions</b> in the material they are learning.</li> <li>- Most importantly, pupils understand what they have learned in the lesson and <b>can recount new learning in their own words. This is true of material they have learned in previous lessons</b> because the teacher has supported transfer to long term memory.</li> </ul> |
| Diagrams, concrete representations and examples are used well.                                                             | <ul style="list-style-type: none"> <li>-The teacher uses dual coding effectively to manage cognitive load by <b>providing graphical representations of material to be learned</b> where appropriate.</li> <li>- <b>Examples, non-examples, analogies and metaphors</b> are well chosen because they <b>connect to the prior knowledge and experience of learners.</b> This means <b>they are likely to move from concrete representations to more abstract representations</b>, though this need not be the case if, for example, learners' have secure prior knowledge of abstract concepts.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Teachers provide, and identify, aspirational models.                                                                       | <ul style="list-style-type: none"> <li>-The teacher <b>provides multiple models of the work that they are asking learners to produce.</b> This may include pre-planned models, live models, co-constructed models, or examples of strong work produced by learners within the class.</li> <li>- These models are used in a way that recognises that novices need more support. <b>As learners become more proficient they are more likely to be involved in the creation of models.</b></li> <li>- <b>Models are presented in line with the principles of explanation, above</b>, so that key information is remembered by learners.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li>- Pupils can <b>name the steps involved in the creation of strong work.</b> They can identify where models are strong and <b>explain what makes those models strong.</b></li> <li>-Pupils can <b>explain the cognitive processes involved in producing strong work</b>, and how experts think.</li> <li>- Pupils' knowledge of models supports them in <b>creating strong pieces of work themselves: this will be evident from the work they produce in class</b>, either their practical creations/performances or the work they produce in their books.</li> </ul>                                                                                                                                                                                                                                                                                             |
| They analyse these, explaining the steps and cognitive processes involved in their production                              | <ul style="list-style-type: none"> <li>- The teacher will make the steps involved in the production of exemplary work explicit. <b>They will make these steps memorable</b> by, for example, naming them.</li> <li>The teacher will narrate their thought processes. <b>This will involve 'thinking out loud' and also commenting on their thinking to make it clear how experts think.</b></li> <li>- Where appropriate, the teacher will involve learners in the thinking process by <b>asking them questions and using their thinking to shape the live model.</b> As learners become more proficient, they will be more involved in the process of creating live models.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## ANNEXE 7 Primary lesson observation proforma

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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| School:                                                                                                                                                                                                              |                                                                                                                                                            | Date:                                                                                                                                                                                                                   |
| Observer                                                                                                                                                                                                             | Teacher                                                                                                                                                    | Class/ Year                                                                                                                                                                                                             |
| Lesson context / learning intentions                                                                                                                                                                                 |                                                                                                                                                            |                                                                                                                                                                                                                         |
| Key Levers for Learning                                                                                                                                                                                              |                                                                                                                                                            |                                                                                                                                                                                                                         |
| <p><b>3; 4; 5. Challenge:</b> Are children at different points of learning challenged to engage their interest and move them forward?</p>                                                                            | <p><b>10; 11. Feedback:</b> Is a clearly established learning dialogue happening? Do children know what they are doing well/what they need to do next?</p> | <p><b>9; 12; 13. Questioning:</b> Are questions (written and verbal) used to encourage greater depth and higher level thinking? Are there opportunities for T-P; P-T; P-P questioning?</p>                              |
| <p><b>7. Language:</b> Are children developing a rich use of appropriately demanding vocabulary? Are children given opportunities to practise this through talk and reading / writing?</p>                           | <p>Passion<br/>Care<br/>Inspiration</p>                                                                                                                    | <p><b>Routines for learning:</b> Are there clear routines for supporting and encouraging positive learning behaviours and consolidation of key learning? Are positive learning behaviours appropriately reinforced?</p> |
| <p><b>6; 7; 8. Modelling:</b> Are children aware of expected outcomes / 'what a good one looks like'? Does the teacher model expected outcomes? Does the teacher model expected skills / attitudes / attributes?</p> |                                                                                                                                                            |                                                                                                                                                                                                                         |
| <p>*Numbers refer to QTF framework. See reverse of sheet.</p>                                                                                                                                                        |                                                                                                                                                            |                                                                                                                                                                                                                         |
| 1; 2; 3; 4; 5. Planning                                                                                                                                                                                              |                                                                                                                                                            |                                                                                                                                                                                                                         |
| Evidence of seating plan/ data overview? (Y/N)                                                                                                                                                                       |                                                                                                                                                            | Contextual information for class provided? (Y/N)                                                                                                                                                                        |
|                                                                                                                                                                                                                      |                                                                                                                                                            |                                                                                                                                                                                                                         |
| Evidence of learning: pupil books/ observed activity                                                                                                                                                                 | Evidence of learning: pupil interviews                                                                                                                     |                                                                                                                                                                                                                         |
|                                                                                                                                                                                                                      |                                                                                                                                                            |                                                                                                                                                                                                                         |
| How teacher strengthens learning                                                                                                                                                                                     | Next steps to enhance learning/ key questions to consider next                                                                                             |                                                                                                                                                                                                                         |
|                                                                                                                                                                                                                      |                                                                                                                                                            |                                                                                                                                                                                                                         |

|                        |                                                                                                              |    |                                                                                                                                                                                    |  |
|------------------------|--------------------------------------------------------------------------------------------------------------|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Expertise and planning | Teachers plan effectively and present clearly because they have deep subject knowledge and expertise         | 1  | Teachers plan and share the learning journey with clarity; they actively present overviews and make the main ideas clear.                                                          |  |
|                        |                                                                                                              | 2  | Thoughtful planning ensures that learning is revisited frequently and appropriately to support long term memory and enduring connections.                                          |  |
|                        | Teachers plan expertly because they have strong pedagogical knowledge and judiciously apply this to content. | 3  | Teachers expertly plan sequences of learning that move students from novice to mastery.                                                                                            |  |
|                        |                                                                                                              | 4  | Resources are well selected and made accessible to all.                                                                                                                            |  |
|                        |                                                                                                              | 5  | Teachers are expert in planning effective approaches for possible misconceptions and areas of complexity.                                                                          |  |
|                        | Teachers can model expertly                                                                                  | 6  | Teachers expertly identify and can create aspirational models. Good practice is spotlighted effectively.                                                                           |  |
|                        |                                                                                                              | 7  | Teachers model expertly so that all students acquire mastery of language and reading in the subject.                                                                               |  |
|                        |                                                                                                              | 8  | Teachers expertly deconstruct cognitive processes so that all students can think in a disciplined way.                                                                             |  |
| Responsive Teaching    | Checking                                                                                                     | 9  | Teachers thoughtfully and sustainably use testing as a means of checking understanding of the main ideas; low stakes assessments often achieve difficult but successful retrieval. |  |
|                        |                                                                                                              | 10 | Teachers allocate time in lessons for all students to reflect upon and improve their work.                                                                                         |  |
|                        |                                                                                                              | 11 | Skilled assessment and feedback by the teacher enables learning of the main ideas for all.                                                                                         |  |
|                        | Questioning                                                                                                  | 12 | Teachers select appropriate and effective questioning techniques.                                                                                                                  |  |
|                        |                                                                                                              | 13 | Teachers create an environment where all students are confident to ask and answer questions.                                                                                       |  |