

Dringhouses Primary School

Teacher Appraisal Policy

Signature of Chair of Governors

Signature of Headteacher

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This is a Local Authority adopted policy.

Appraisal Policy

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1. Introduction

- 1.1 Appraisal plays an important role in the communication and performance management processes within Dringhouses Primary School. It is key to supporting the school's commitment to developing its staff and to delivering excellent educational provision to pupils.
- 1.2 This policy sets out the framework for a clear and consistent assessment of the overall performance of all staff employed at Dringhouses Primary School and for supporting their development needs. The policy provides a process through which staff performance and development objectives may be linked to the school's improvement plan and priorities.

2. Purpose of Appraisal

- 2.1 The main purposes of the Appraisal Policy are to:
- Ensure that the appraisee's contribution to the school is recognised
 - Help the appraisee to identify ways of enhancing their professional practice and work performance
 - Assist staff to realise their potential and to plan for professional and personal development
 - Provide information which will assist in reaching pay decisions (teaching staff only)
 - Provide a mechanism for addressing early concerns about an employee's performance
- 2.2 Appraisal in this school will be a supportive and developmental process in the context of the school's improvement plan. It is designed to ensure that all staff have the skills and support they need to carry out their role effectively. The aims of the policy are to improve outcomes for all children at the school and to ensure that all employees, are motivated to continuously develop their skills and improve their performance.
- 2.3 This policy is separate from the school's Capability Policy. The Appraisal Policy will aim to address any concerns that are identified regarding an employee's performance. If concerns cannot be resolved through the appraisal process, there will be consideration of whether to commence the formal Capability Policy.
- 2.4 The assessment of performance reached through this policy for teaching staff will contribute to pay decisions in line with the school's Pay Policy. Decisions of the Governing Body's Pay Review Committee in relation to pay progression for teaching staff will be made with reference to this policy as well as the Pay Policy.

3. Application

3.1 This policy applies to all employees of the school with the following exceptions:

- Early Career Teachers undergoing their statutory induction period
- Newly appointed support staff within their probationary period
- Staff employed on a contract of less than one term
- Any member of staff who is the subject of the Capability Policy
- Supply, casual and relief workers who work rarely within the school

3.2 Modified appraisal arrangements will apply to staff who have only been at work for part of the appraisal cycle. This will include employees:

- on parental leave including maternity and adoption leave
- on long-term sickness absence
- who join or leave the school part way through the appraisal cycle
- who come out of other arrangements during the appraisal cycle including probation, statutory induction and capability

3.3 These arrangements are detailed in paragraphs 5.7 – 5.8.

4. Guiding principles

4.1 In developing and applying this policy, the school is committed to ensuring fairness and consistency of treatment within the prevailing legal framework applicable to all employers and in line with the school's equality policy.

4.2 The appraisal process and the supporting documentation will be treated in the strictest confidence at all times. Only those who need access to such information to enable them to discharge their responsibilities will be granted access.

4.3 All members of staff will be clear about the evidence that their appraiser will require to assess their performance and how this will be collected. The methods of measurement and collection, using a range of methods, will be agreed at the beginning of the appraisal cycle when objectives are agreed. Judgements relating to performance must be supported by evidence and will largely be determined by the nature and scope of the agreed objectives and/or the competency framework/Teachers' Standards.

4.4 At the end of the appraisal period, and once a pay decision has been made, if applicable, all appraisal documentation will usually be placed on the employee's personal file, though may be held elsewhere, for example on an electronic system, provided that this is secure and confidential. Appraisal information will be held for a minimum of 6 years from the end of the appraisal period to which it applies and then be securely destroyed.

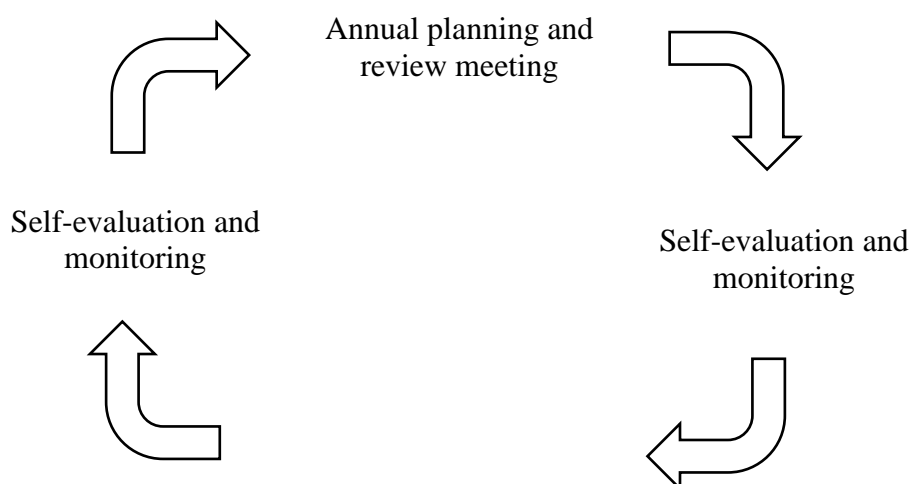
- 4.5 Appraisal is a two-way process and actions and objectives should be agreed between the appraisee and the appraiser. Objectives should be SMART and clear around what success in meeting objectives will look like and how this will be measured. Any rights of appeal and the process to follow are detailed within the relevant section.
- 4.6 The school's CPD programme will be informed by the training and development needs identified as part of the appraisal process. The governing body will ensure in the budget planning that, as far as possible, resources are made available in the school budget for appropriate training, and support agreed for appraisees, maintaining access on an equitable basis.

5. The Appraisal Process

- 5.1 The appraisal process is an integral part of good performance management and should be an enjoyable and empowering process for both appraiser and appraisee. The process provides an opportunity for the employee and their appraiser to have an in-depth, two-way, confidential discussion regarding the employee's performance and job role.
- 5.2 It gives the appraiser an opportunity to give appropriate appreciation and recognition of good work. At the same time it gives the appraisee the opportunity to discuss how they are progressing in terms of the achievement of objectives and key performance indicators as well as competency development.
- 5.3 Issues of concern regarding performance should be addressed as and when they arise as part of normal day-to-day management and, therefore, should not be first raised at appraisal meetings. Any concerns about performance that may pose a risk to pay progression for teaching staff should be signalled at an early stage. Concerns regarding performance for all staff should be dealt with under the procedure detailed at section 11.

Stages in the process

- 5.4 The annual appraisal process works on a cyclical basis which is shown below:



Interim Review

The Appraisal Period

- 5.5 The appraisal period will be for 12 months and will run from September to August.
- 5.6 In line with the school's Pay Policy, teachers' salaries will be reviewed annually with effect from 1 September and no later than 31 October (or 31 December in the case of the Headteacher).
- 5.7 Where a member of staff starts their employment with the school or changes post part way through an appraisal cycle, the Headteacher shall determine appraisal arrangements for the remainder of the appraisal period, with a view to bringing their cycle into line with the cycle for other staff as soon as possible. This may also apply to staff starting or returning from maternity or long-term sickness absence part-way through the appraisal period or those successfully completing their statutory induction or probationary period or coming out of formal monitoring or capability processes. In such situations either shorter-term or longer-term objectives may be set, linked to the end of the current or next appraisal cycle respectively.
- 5.8 Where an employee is moving between roles within the school then there will be a review of their performance and development objectives and their appraisal arrangements, usually at an interim review.
- 5.9 Where an individual is employed on a fixed term contract for a period between 1 term and 12 months, the length of the appraisal period will be determined by the duration of the contract.

6. Roles and Responsibilities

The Role of the Appraiser

- 6.1 Appraisal is an ongoing process and the appraiser has a continuing responsibility for the support, development and assessment of the appraisee. It is the responsibility of the appraiser to ensure that appraisal meetings take place and that the process is completed in accordance with the requirements of the policy:
- For **teaching staff**, there will be a minimum of an annual planning/review meeting and at least one interim review.
 - For **support staff**, there will be a minimum of an annual planning/review meeting and ideally at least one interim review.

- For **all staff**, an additional interim review will be held, in exceptional circumstances, if it is necessary to amend objectives, for example as a result of emerging new priorities or a change of role.

6.2 Appraisers will be responsible for:

- The ongoing development of appraisees and discussing any concerns at an early stage when they arise
- Monitoring the progress of appraisees against their performance and development objectives throughout the appraisal period
- Assessing appraisees against their performance and development objectives and the relevant competency framework or the Teachers Standards, on the basis of their career stage, at the end of the appraisal period
- Agreeing new performance objectives linked to the team and school strategic objectives
- Agreeing development objectives relevant to the performance objectives and suggesting how these will be met

The Role of the Appraisee

6.3 The appraisee is expected to support and participate in the appraisal process and any agreed development activities arising from the process.

6.4 In addition, appraisees should self-assess their performance and progress made towards performance and development objectives and gather evidence and information to support their assessments. Appraisees should prepare for any appraisal meetings and be prepared to discuss and/or evidence their self-assessments.

Appraisal of the Headteacher

6.5 The appraisal of the Headteacher will be carried out by a sub-group of governors plus an external educational advisor, (usually the school improvement advisor).

Appraisal of all other employees

The Headteacher is responsible for the appraisal of all other employees but has delegated this responsibility, for some staff, to line managers/SLT line managers.

Where employees have fractional contracts with two different line managers, they may undergo two appraisals.

Where a teacher is experiencing difficulties and the Headteacher is not the appraiser, then the Headteacher or another appropriate member of the senior leadership team may undertake the role of appraiser.

Should a member of staff object to the appointment of their appraiser (where this isn't the Headteacher), they should put the grounds for their objection in writing to the Headteacher who will consider this and make a determination. The decision of the Headteacher is final and not subject to further appeal.

7. The Planning and Review Meeting

7.1 The performance of all staff will be formally assessed in respect of each appraisal period. This assessment is the end point to the annual appraisal process and will take place at the Planning and Review Meeting.

7.2 Appraisal discussions are most successful when both appraisee and appraiser are well informed and prepared. The areas for discussion should be agreed at the start of the meeting as should the arrangements for making notes and writing up appraisal records.

7.3 The appraisal record should include:

- Acknowledgement of achievements, strengths, good practice and successes of the appraisee as appropriate
- Review of achievement against the previous year's objectives and relevant competency framework/the teaching standards
- Review of professional development activities undertaken in the previous period including how these activities have enhanced the appraisee's work effectiveness
- Discussion regarding pay recommendations following assessment of achievement (teaching staff only)
- Review of the appraisee's job role and description
- Agreement of work related performance and development objectives for the coming year linked to department and school improvement plans
- Agreement of how objectives will be assessed and evidence of achievement gathered
- Agreement of how development will be supported and objectives met

7.4 The appraisee will be provided with a copy of the appraisal record within 10 working days of the planning and review meeting.

8. Interim Review

8.1 For teaching staff, there must be a minimum of one interim review during each appraisal cycle. For support staff, there will usually be at least one interim review during each

appraisal cycle. The date for the interim review may be set at the annual Planning and Review Meeting.

8.2 The main purposes of the interim review are:

- To review the appraisee's progress made to date against performance and development objectives
- To review objectives to ensure they are still relevant
- To provide guidance and support in ensuring objectives are achieved

8.3 Alternative objectives may be substituted at this point should they be relevant to the school improvement plan and agreed by the appraisee. Development needs may also be reviewed and revised.

8.4 Additional interim reviews may be held if there is a need to review objectives due to changing circumstances or the appraisee moving to a different job role. If there are concerns regarding a lack of progress made towards performance objectives, additional reviews may be arranged to support the appraisee and monitor their progress. The number of additional interim reviews should be reasonable in the circumstances.

8.5 The appraisee will be provided with a record of the interim review within 10 working days of the meeting.

9. Performance and Development Objectives

9.1 The performance and development objectives set will be relevant to the individual's job role and contribute to the school's strategic objectives. Staff with a management or additional responsibility may have a specific objective set in relation to this. It is the policy of this school to give staff no more than 3 objectives of which at least one is developmental.

9.2 On the grounds that emerging issues are unlikely to be known at the outset of an appraisal period, objectives may need to be adjusted throughout the appraisal period so that they remain relevant to the performance of the individual and to the priorities of the school. This would usually be through agreement and an interim review would be arranged to discuss any necessary changes. Such changes should only happen in exceptional circumstances, for example due to a significant change in the employee's personal circumstances, their role and duties or the pupils they teach/work with.

9.3 The objectives set will be fair and equitable when judged across employees with similar roles and responsibilities taking into account part-time working arrangements and where employees hold multiple posts. For example, objectives for those working part-time, should be pro-rated to those of full-time colleagues, either in terms of the level of demand or number of objectives. However, objectives are likely to be more challenging depending on

the individual's level within the school structure or on the pay scale. When setting objectives, due regard will be paid to current guidance regarding the use of pupil assessment and attainment data¹.

- 9.4 Every effort will be made to reach agreement regarding an individual's objectives and they should only be imposed on an appraisee as a last resort. In cases where there is a disagreement of this sort, the Headteacher may make a final determination regarding the suitability of objectives, including where they are not the appraiser. However, it will be recorded on the appraisal record where the employee does not agree with the objectives. There is no further appeal regarding the suitability of objectives.

Teachers' standards

- 9.5 The Teachers' Standards define the minimum level of practice and professional conduct expected of trainees and teachers from the point of being awarded QTS. However, the school has an expectation that a teacher develops their professional practice throughout their career as they gain more experience and expertise.

Support Staff Competencies

- 9.6 The school will use relevant competency frameworks against which the performance of support staff will be assessed. Where a competency framework is being used, it will be discussed with the appraisee and recorded on the planning and review statement.

Gathering the evidence

- 9.7 It is important that all members of staff are clear about the evidence that will be required by their appraiser to enable the appraiser to assess their performance and how this will be collected. The methods of measurement and collection will be agreed at the planning and review meeting at the beginning of the appraisal cycle when objectives are agreed. A range of methods will be used to assess the performance of appraisees and over-reliance will not be placed on any one particular method.
- 9.8 Judgements relating to performance must be supported by evidence and will largely be determined by the nature and scope of the agreed objectives and/or the competency framework/Teachers' Standards.
- 9.9 Self-evaluation is an important part of an effective appraisal process and staff can develop their skills when they explore their strengths and areas for development through reflection.
- 9.10 This school believes that observation of classroom practice and other responsibilities is important both as a way of assessing teachers' performance and of gaining useful

¹ [Making Data Work – November 2018](#)

information which can inform school improvement more generally. All observation will be carried out in a supportive fashion and in line with the Guidelines detailed at appendix 1.

- 9.11 The amount and type of classroom observation relating to appraisal will depend on the individual circumstances of the teacher and the overall needs of the school, but normally the total amount of time will not exceed three hours/three occasions in any appraisal cycle. Classroom observation of teachers will be carried out by those with QTS.
- 9.12 Observation may also be appropriate for the appraisal of roles supporting teaching and learning in the classroom, both for monitoring and development, and will be carried out in a supportive fashion by line managers/appraisers.

10. Interaction with the Pay Policy – Teaching Staff only

- 10.1 The assessment of performance reached through the appraisal process will contribute to pay and incremental progression decisions under the school’s Pay Policy for teaching staff. The appraiser will make a pay recommendation and discuss this with the appraisee at the Planning and Review Meeting.
- 10.2 For teaching staff to meet the criteria for pay progression, they will need to demonstrate the following:

Assessment of performance linked to pay		
Criterion	Assessment	Progression
Assessment of performance against Teachers’ Standards including observations and other monitoring measures	Met	If all 3 criteria met then progress will be recommended (subject to reaching top of scale)
Achievement against individual (or group) performance and development objectives	Met or, where appropriate, good progress made	
Successfully undertaking full range of duties in line with job description	Met	

- 10.3 Due consideration will be given to unmet objectives that are due to reasons beyond the individual’s control.
- 10.4 Should a teacher disagree with their individual pay recommendation, they should discuss this, in the first instance with their appraiser. Any appeals relating to pay recommendations will be dealt with under the appeals process in the school’s Pay Policy.

Exceptional performance

- 10.6 If evidence shows that a teacher has demonstrated exceptional performance in relation to the criteria set out in paragraph 10.2 above on a sustained basis, a recommendation may be made to the Pay Review Committee to consider use of its discretion to award more than one progress point in one year. That is, the teacher has:
- demonstrated exceptional performance in a significant number of the Teachers' Standards in accordance with their role and level of responsibility; and
 - has exceeded requirements in relation to their individual objectives, the expectations of the role and level of responsibility as described in their job description, and
 - has had the quality of their teaching and work performance found to be consistently outstanding.
- 10.7 Sustained in this context is defined as a period of no less than 2 full appraisal cycles.

Failure to meet the expected standard

- 10.8 If evidence shows that a teacher's performance has failed to meet the criteria set out in section 10.2 above a recommendation may be made to the Pay Review Committee to award no progression.
- 10.9 In cases where the employee's performance is causing concern it will be dealt with in accordance with section 11 of this policy or the school's formal Capability Policy.

11. Dealing with Concerns about Performance

- 11.1 Whether issues are addressed through an informal Appraisal Support Plan or a Formal Meeting will depend on the nature and seriousness of the concerns. It will not be necessary in all cases for an informal Appraisal Support Plan to have been implemented before moving to a formal meeting. In exceptional circumstances, where there are significant and serious concerns regarding the employee's performance, it may be appropriate to proceed straight to the Capability Policy.

Informal Appraisal Support Plan

- 11.2 At any stage during the annual appraisal cycle, where there are minor aspects of an employee's performance that cause some concern, the appraiser may work with the employee (and their line manager if applicable) to address the area of concern. Concerns should always be raised when they arise so the employee can be given an opportunity to address the issue.

11.3 An informal Appraisal Support Plan may be used at this stage, which identifies the areas for improvement, the timeframe, any associated actions and the support that will be offered. Where an informal Appraisal Support Plan is put in place to address a minor issue, this will not normally impact on pay progression for teaching staff, which will be determined at the annual Planning and Review Meeting taking into account the criteria in paragraph 10.2.

Formal meeting

11.3 If it is identified that there are aspects of the employee's performance which, if not rectified, could lead to capability procedures the appraiser, the Headteacher, or a member of the leadership team, will arrange a formal meeting with the employee.

11.4 The employee will be given at least 5 working days' notice in writing of the formal meeting and will be notified of their right to be accompanied by a work colleague or union representative. When setting the meeting date, due consideration will be given to the individual's working pattern and their representative's availability.

11.5 The purpose of the formal meeting is to:

- give clear feedback to the employee about the nature and seriousness of the concerns
- give the employee the opportunity to comment on and discuss the concerns
- set clear objectives for required improvement
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address those specific concerns
- make clear how, and by when, the appraiser or other senior leader, will review progress
- explain the implications and process if no, or insufficient, improvement is made e.g. impact on pay progression (teaching staff only) and potential move to formal capability.

11.6 A documented formal Appraisal Action Plan will be produced and a copy provided to the employee within 5 working days of the meeting.

11.7 The employee's progress will continue to be monitored as part of the appraisal process and a reasonable time given for performance to improve. The time for improvement will depend upon the circumstances and will be clearly specified, with appropriate support as agreed in the Appraisal Action Plan, in order that the aim of recovering and improving performance can be achieved. During this monitoring period the employee will be given regular feedback on progress and arrangements will be made to modify the Appraisal Action Plan if appropriate. A mid-point review meeting will be arranged during the monitoring period and the employee may be accompanied at this meeting by a work colleague or union representative.

- 11.8 At the end of the period specified in the Appraisal Action Plan, a review meeting with the appraiser or senior leader will be convened to review performance.
- 11.9 If **sufficient progress has been made**, such that the employee is performing at a level that indicates there is no longer a possibility of capability procedures being invoked, the employee will be informed of this. Following this review meeting, the appraisal process will continue as normal.
- 11.10 If **significant progress** has been made, such that the employee might reasonably be expected to achieve the required standard of performance within a short time period, then the monitoring period under the Appraisal Action Plan may be extended. This should only happen once and for a maximum of four weeks.
- 11.11 If **no, or insufficient improvement** has been made over this period, the employee will be advised of this at the review meeting. They will also be notified that the appraisal system will no longer apply and that their performance will be managed under the Capability Policy and they will be invited to a formal capability meeting. This will be confirmed to the employee in writing within 5 working days of the meeting.

Appendix 1 – Lesson Observation Protocol

Introduction

This protocol covers classroom observations undertaken as part of the school's appraisal arrangements.

Purposes

Classroom observations will be used to monitor the quality of teaching and learning as a part of school self-evaluation, performance management and individual appraisal. They should support a culture of continuous improvement by helping individuals develop their professional practice.

Principles

Classroom observations relating to appraisal:

- Should provide evidence of a teacher's pedagogical skills
- Should be supportive and developmental
- Should be multi-purpose, wherever possible, to minimise the potential burden and number of observations
- Will be undertaken by appraisers but may also be done by other school leaders who have appropriate professional expertise, for example subject leaders
- In the case of teachers, will be undertaken only by those with QTS
- Should be made possible by sufficient timetable release time being provided
- Will not be done in PPA time (unless requested/agreed by both parties)

Frequency and Duration

The focus of classroom observations to be undertaken in relation to appraisal should be agreed in the review meeting statement at the start of the review cycle. Precise times and dates do not need to be finalised in the planning and review meeting. However, when agreeing the timing of observations for appraisal, teachers should have reasonable notice of when they will occur (a minimum of 5 working days' notice). The number of observations made will vary, but will not normally exceed 3 hours per appraisal cycle. If concerns arise during the review cycle it may be necessary to revise the number of observation agreed at the start of the cycle.

Observations may be for whole lessons or parts of lessons, depending on the agreed focus.

Teachers may be involved in observing and/or being observed as part of the support being provided to assist with achieving agreed objectives. Beyond this, teachers should have the opportunity to engage in further classroom observations by agreement. For example, many schools encourage the use of coaching pairs or triads and peer observations.

Any observations made by Ofsted fall outside normal observation arrangements.

Effective classroom observations should:

- Provide a performance reviewer with evidence of the quality of a reviewee's classroom practice (quality of teaching and learning)
- Help the headteacher develop an overview of the quality of teaching and learning in school
- Provide teachers with feedback on practice which aids reflection and self-evaluation and helps continuous development
- Identify and celebrate good practice
- Help to improve classroom performance by identifying areas for development which will extend expertise

Planning

The focus of observations to be undertaken for appraisal purposes should be agreed in the planning and review statement at the beginning of the performance management cycle. Nearer to the time of observation, and at least five working days before it, the following should be agreed:

- The exact focus for the observation and criteria to be used (if different to general lesson observation criteria)
- A time for the observation
- How and when the feedback will take place

Protocols and Methodology

The teacher being observed should assist the process by:

- Having relevant planning to hand, for example lesson plan or scheme of work
- Providing any relevant information on pupils, such as attainment data, pupil objectives, grouping arrangements within class and location of pupils with SEN

The criteria used for lesson observation should:

- Be agreed and understood by the teacher being observed and the appraiser. For most lesson observations the school's lesson observation schedule will be used but sometimes more detailed criteria will be appropriate. For example, if a teacher is working on improving questioning techniques, a schedule of what effective questioning involves may be used to support the observation. The important thing is always that the person being observed has a copy of and understands the criteria being used
- Be used to evaluate the quality of teaching and learning
- Be used to provide constructive feedback and identify areas for possible improvement and development

All observers should demonstrate:

- Courtesy and objectivity in the conduct of observation and related meetings
- A respect for the confidentiality of any information gained in the course of carrying out the observation and giving feedback

During the lesson being observed they should:

- Sit somewhere which provides a good view of the activities of the students and teacher and should be as unobtrusive as possible
- Talk to pupils, where appropriate, about their understanding and experiences so long as it does not disrupt the progress of the lesson
- Look at work being done in the lesson and, where appropriate, look at earlier work done by pupils

Recording the observation

- It is important to record observations as the lesson progresses rather than relying on memory to recall what took place. A timeline could be used to help with this
- Teacher activity and impact on pupil activity should be noted
- Progress observed during the lesson should be noted

Giving feedback

- Before giving feedback the observer needs to take time to reflect on the lesson and to identify the key messages from his/her notes. The teacher also needs time to collect his/her thoughts on the lesson
- Feedback following a lesson observation should include a clear judgement on lesson quality, carefully explained. It should enable teachers to build on what they are doing well and feel confident about introducing modifications where necessary
- Verbal feedback should be given as soon as possible after the observation and no later than the end of the next day. It should always be out of the hearing of others and where disruptions can be kept to a minimum. There should be enough time allocated for a professional discussion around the feedback to take place. Written feedback will normally be provided within ten working days of the observation.
- PPA time must not be used for giving feedback unless this has been requested/agreed by the employee.
- The observer should focus on how effective the lesson was in enabling learning to take place and the ways in which the teaching and activities contributed to it. When making an assessment, observers should always refer to the evidence they are drawing on and link it to the agreed observation criteria
- Recommendations, objectives or action points set as a result of the observation should be practical and achievable and leave the teacher feeling that they can make progress. Clearly agreed deadlines and review timescales should be provided. If specific support and/or training is needed this should be noted, with a clear statement of who will organise this. It is likely that most CPD needs arising from observation will be met 'in house'.
- A short written record should be produced in line with school policy and presented to the teacher being observed, normally within 5 and no more than 10 working days of the observation. The teacher should be given the opportunity to add any comments they feel are appropriate to the record sheet

These guidelines refer to lesson observations undertaken as part of the appraisal arrangements in school. Any observations outside of the appraisal process will be consistent with these principles.