



# A Guide to

## Continuing Professional Development - Formal observations

# Formal observations

Formal observations are part of the performance management process in a learning centre. It may have a developmental and/or an evaluative function.

It has a developmental function:

- when a teacher wants help in identifying strengths and areas to work on in their teaching
- when a teacher is experiencing problems with a class and wishes for support in identifying issues and solutions

It has an evaluative function when a line manager or other manager needs to observe a teacher, for example:

- During the probationary period
- At the beginning of a contract in order to initiate discussion about possible development areas
- At the end of a contract for reference purposes
- Following student complaints
- In order to advise a teacher on her readiness to follow a course

## Who is the observer?

The observer in a formal observation should be an experienced and trained observer. He or she is likely to be in a training or management role within the teaching centre.

## The formal observation process

The process consists of the following stages:

- Pre-lesson preparation and discussion
- Lesson
- Post-lesson feedback, discussion and development planning

The following documents are normally required for a formal observation (examples of the first two are given at the end of this guide):

- Lesson-plan template
- Observation template
- Teaching skills and standards by which the teacher will be observed

- The learning centre's policy and procedure for formal observations (this provides the teacher with clarity on what is expected of them, and how the results of formal evaluations are applied to performance management, for example, what the consequences of a poor evaluation are and what the rewards for a good evaluation are).

At each stage of the process, the observer needs to adopt appropriate behaviour, as indicated in the following description of the procedure, and in the observation etiquette included later.

## Procedure

1. The teacher has a copy of and is aware of the teaching skills and standards. Discussion with the line manager and some self assessment against the skills may have already taken place. The teacher also has a copy of the lesson-plan template and drafts a lesson plan.
2. The observer and teacher meet to discuss the lesson. The observer will act in an appropriate way (non-directive, collaborative, alternatives, directive) according to the teacher's wants and needs during the discussion. Changes to the plan may or may not be made after this discussion. Table 1 shows a framework for the discussion.
3. Before the lesson, the teacher provides a copy of the final lesson plan to the observer. During the observation, the observer writes a description of what happens in the lesson as objectively as possible (referring also to the lesson plan).
4. After the lesson, the observer writes up observation notes and poses questions about the lesson using an observation template, such as the one included in this guide. The questions should relate to key issues in the lesson and should encourage reflection about both strengths and weaknesses of lesson in relation to the teaching skills. Questions with 'why', 'how', 'what' are likely to encourage more reflection than yes/no questions. Aim for between six and ten questions. The observer then passes the document on to the teacher.
5. The teacher responds to the questions posed by the observer and adds any other comments or thoughts of their own to the document. The notes may follow the example in Table 2.

**Table 1**

Phase	Teacher action	Observer action	Observer style
'Talk me through...'	Describes plan (and explains reasons, discusses alternatives)	Listens actively	Non-directive
'Tell me more about why...'	Explains reasons for choices in relation to intended student learning (and discusses alternatives)	Probes and encourages links between choices and intended student learning choices and the previous teaching behaviour of the teacher and their outcomes	Collaborative
'What if..?'	Discusses possible alternative courses of action	Checks teacher has alternative courses of action ready if necessary, or offers ideas	Alternatives
'I've a feeling it might be a good idea if you...'	Agrees	Gives further tasks to carry out without which the students are unlikely to learn or the teaching is likely to be dangerous	Directive

Based on Malderez, A. and Bodoczsny, C Mentor Courses (CUP) 1999 p. 203

**Table 2**

Description of lesson	Questions	Comments
Observer writes narrative about lesson that describes the events objectively without judgmental comments	Observer poses questions about the lesson (about strengths and weaknesses in the lesson linked to teaching skills)	Teacher responds to questions and writes responses on observation form (guided self-evaluation)

6. The observer and teacher meet to discuss the lesson using structured feedback (non-directive, collaborative, alternatives , directive) as appropriate, depending on the teacher's' ability to self-assess their lesson. It is important that the observer does not impose his/her opinion but from the outset encourages and provides the opportunity for the teacher to talk about and evaluate her own teaching. A directive approach will only be necessary when the teacher is unable to self evaluate and/or seeks guidance. Table 3 shows a framework for the discussion.
7. The teacher writes up a summary of her reflections on the lesson and her thoughts after the post-lesson discussion. She identifies action points as a result of the process. She passes the document back to the observer.
8. The observer writes a final comment about the process (focussing on the teacher's ability to self-evaluate and identify appropriate action points) and teacher and observer sign off the document.
9. Further action may take place as appropriate, e.g. drawing up a learning plan, planning a further observation, implementing a performance improvement plan, writing a reference.

**Table 3**

Phase	Teacher action	Observer action	Observer style
'Talk me through...'	Describes (and interprets, evaluates, plans)	Listens actively	Non-directive
'I saw/I heard...'	Listens, interprets (and evaluate and plan)	Describes: 'holds up the mirror'	Collaborative
'Tell me more about... How/what else might...?'	Finds and considers alternatives (plans)	Probes (explores teacher beliefs and attitudes)	Alternatives
'I'd like you to... Why don't you...?'	Agrees	Makes decisions, sets tasks	Directive

Based on Malderez, A. and Bodoczsky, C Mentor Courses (CUP) 1999 p. 202

## Observation etiquette

Agreeing behaviour in advance can make observations more relaxed and constructive for both observer and teacher

### Observer:

- Respect the confidentiality of what you observe and discuss.
  - Be on time for the lesson.
  - Ask the teacher where s/he would like you to sit.
  - Observe carefully and make notes relevant to the skills and standards you are observing.
- Don't distract the teacher during the lesson, or join in the lesson and ask the teacher or students questions.
  - Leave at the time you have agreed with the teacher.
  - Don't forget to set up a time for discussion and reflection with the teacher.
  - Remember to record the observation.

## Teacher

- Tell your students beforehand that your observer will be coming, and introduce him or her to your class.
- Be on time for the lesson.
- Think about where you want your observer to sit, and prepare a chair/table for him or her.
- Don't forget to set up a time for discussion and reflection with your observer.
- Remember to record your thoughts about the lesson before the post-lesson discussion.

## Lesson-plan template

<b>Teacher:</b>	<b>Observer:</b>
<b>Class:</b>	<b>Class size:</b>
<b>Date:</b>	<b>Level:</b>
Class profile ( a brief description of the class )	
Subject Content ( links to curriculum content for Primary, GCSE / A level )	
'Learning Objectives ( what are students learning about? )'	
Learning Outcomes ( what will students have learnt by the end of the lesson? )'	
Timetable fit ( why you are giving this content at this point in the course )	
Anticipated problems ( class size / wide range of ability levels / behaviour / other things that may affect your lesson )	
Materials	
Other relevant information	
Questions I would like to answer	

Stage and time	Aim	Procedure	Interaction

Stage and time	Aim	Procedure	Interaction

## Formal-observation template

Teacher:	Observer:	
Class:	Date:	
Lesson plan	Questions (observer)	Comments in response to questions (teacher)
Lesson plan	Questions (observer)	Comments in response to questions (teacher)
Summary of post-observation discussion	(teacher)	
Observer comment		
Signed (observer):		
Signed (teacher)		

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