Monitoring and Evaluation Policy - Primary

Version 2.0

Name of Responsible Committee/Individual:	Board of Directors
Implementation Date:	July 2017
Review Date:	July 2019
Target Audience:	All Staff, Students and Parents/Carers
Related Documents/References	

Aim:

To ensure a coherent, comprehensive and efficient monitoring and evaluation cycle that underpins all school planning and supports classroom teachers, middle leaders, senior leaders, Local Governors and Trustees in achieving consistently outstanding performance in all areas of school life across all trust schools.

Key principles:

We have developed our monitoring and evaluation cycle so that it is:

- comprehensive and accurate;
- efficient, transparent and understood by range of audiences;
- up to date;
- consistent;

and which:

- evaluates performance of achievement, teaching, behaviour and leadership;
- shares responsibility among all teaching staff;

and above all:

- leads to actions that improve outcomes for all pupils.

Outcomes:

Self-evaluation is an ongoing cycle that is inseparable from school planning and performance management; it is summarised in a Self-Evaluation Form document, in the CEO's reports to Trustees and Heads of Schools' reports to Local Governors.

Middle and senior leaders are secure in their judgements of all aspects of school performance as defined in the Ofsted Framework for Inspection.

Judgements of performance draw on a wide range of evidence; they are robust, well-documented and consistent across all areas of school; they provide evidence for tackling underperformance and underachievement.

Monitoring and evaluation identifies and celebrates a wide range of achievements of both pupils and staff.

Introduction:

This document describes the monitoring and evaluation processes, outcomes and actions that are used in the Trust and its schools' annual cycles of review, the summary of which underpins the judgements in each school's Self Evaluation Form (SEF). There is a Trust-wide monitoring and reporting cycle and each school has a school improvement entitlement which is dependent on a school's capacity for self-improvement and for contributing to the improvement of other schools.

Each school's SEF will be updated four times per year and the judgements made in it will inform whole school and team planning, individual performance management and whole school and individual training priorities.

Trustees have oversight of the performance of each school and Local Governing Bodies have more detailed understanding of the strengths and areas for development for individual school.

Processes and methods:

The following practices specify how monitoring will take place and each has a recording and checking procedure that will build into a body of evidence to support the school's judgements in the SEF. The list is followed by individual descriptions that detail the process, the expectations of the staff involved and the responsibility for ensuring the rigour and effectiveness of the process.

Trust Processes

- Trust Key Performance Indicators (KPIs)
- Chief Executive's Report to Trustees
- CEO Visits
- Core School Information (CSI)
- Trust Development Plan
- Improvement Partner Visits
- Trust Reviews (annual, pupil premium, safeguarding, governance)

School Processes

- School Performance Data
- Head of School Report to Governors
- Governors' monitoring and evaluation
- Self-Evaluation Form (SEF)
- School Leaders' Performance Analysis Meetings
- Autumn Achievement Report (AAR)
- Achievement, Teaching and Behaviour Reviews (ATBR)
- School Improvement Plan (SIP) reviews
- Team Improvement Plan reviews (TIP)
- Team Reviews (e.g. curriculum subject reviews)
- Line Management meetings
- Zoning
- Learning walks
- Book scrutiny
- Classroom observations (NQTs, PM, subject or staff monitoring)
- Performance Management (PM)
- Parent & carer voice
- Student voice

The CEO, with the Executive Principal and Heads of School, will produce an annual monitoring & evaluation plan and calendar with key responsibilities and dates.

TRUST PROCESSES

Trust KPIs

Sets of key data about each school's performance are collated six times each year. The purpose of the KPI document is to enable the Trust Directors to monitor the comparative performance of each school across a range of measures. This provides early warning of any interventions that may be required across the Trust that have not been identified through other processes of monitoring and evaluation. Trust KPIs are reported to Trustees as part of the Chief Executive's Report to Trustees. The CEO, Executive Principal, Heads of School and Central Trust Team can monitor KPIs daily, weekly or at any given interval through SIMS School View.

Chief Executive's Report to Trustees
Following the collection of Trust KPIs, The CEO meets with the Head of School to scrutinise the data. The CEO RAG rates each area and reports to Trustees 6 times per year.

CEO Visits
The CEO undertakes seven QA visits per year to each school. The first visit lasts up to a full day and subsequent visits are half a day. The purposes of the visits are to scrutinise data, review the school improvement plan, review and agree Trust Director (or SLE) deployment and undertake any other QA activity the CEO deems relevant.

Core School Information
Every week, each school produces a CSI sheet with key information from that week. The Head of School analyses the data and highlights key issues and immediate actions required. The CSI sheet is submitted to the CEO and is scrutinised at the weekly trust team meeting. The CSI is used to identify any emerging issues and to ensure trust capacity is focused in the right areas.

Trust Development Plan
This is a plan that indicates the long-term priorities for the trust identified as a result of internal and external monitoring and national and regional developments. Broad development themes are decided at trust team and executive board levels and objectives are produced by members of those teams reflecting their individual responsibilities. The CEO has responsibility for the implementation and review of the plan.

The Trust Development Plan will be reviewed at Trustees' meetings, with updates on actions and impacts. At the end of each year new objectives may be set and any still on going from the previous plan will be carried forward or subsumed in the new objectives.

Improvement Partner
The trust has an Improvement Partner for each phase – primary and secondary. The Improvement Partner is external to the trust and is an NLE or LLE. The Improvement Partner undertakes a minimum of one visit each year to each school in the autumn term. The purpose of the visit is to scrutinise performance data from end of key stage exams, to review draft School Improvement Plans and to provide support and challenge to the Head of School.

Trust Reviews (annual, pupil premium, safeguarding, governance)
Each school has an entitlement to a number of Trust reviews. These typically take a day or half a day. The annually review takes place in the summer term and is conducted by an extended team. The safeguarding review takes place annually and is a peer review conducted by another Head of School in the trust. The Pupil Premium Review is led by a senior leader within the trust with support from the CEO or EP. Bi-annually there is a review of governance led by an external NLG commissioned through the Teaching School.

SCHOOL PROCESSES

School Performance Data
Sets of key data about each school's performance are collated following each data collection and a data pack is produced. The purpose of the data pack is to enable the School Leaders to identify trends in achievement, teaching, behaviour, attendance and punctuality by comparing data to similar periods in previous years. This provides early warning of any interventions that may be required that have not been identified through other processes of monitoring and evaluation.

Head of School Report and Governors' Monitoring and Evaluation
Regular monitoring of all aspects of the school is carried out by local governors and is ratified in full governors' meetings 4 times per year. Governors receive a Head of School Report four times each year. The report analyses all areas of school performance and summarises evidence from all monitoring and evaluation processes. The report is produced following each Performance Analysis Meeting and SEF update and therefore governors have access to the evidence that underpins the key judgements in the SEF. Governors also monitor performance through Team Reviews (e.g. Curriculum Subject Reviews) (see above) and through the work of designated governors for Child Protection, Looked After Children, Pupil Premium, SEN and Inclusion and monitoring and evaluation (and sixth form where relevant).

Self-Evaluation Form
The SEF is the single central document that summarises evidence from all monitoring and evaluation processes and provides a judgement on the school's performance in terms of achievement, teaching, behaviour and leadership and management. It is updated four times per year by the Head of School following Performance Analysis Meetings and may be scrutinised by the CEO. The judgements made in it inform whole school and subject planning, individual performance management and whole school and individual training priorities.

Performance Analysis Meetings
Performance Analysis Meetings take place four times each year, once following the summer results and three times following each data collection. The relevant School Leader and the Data Manager compile a package of documentation that consists of EYFS, Key Stage 1 and Key Stage 2 performance dashboards, a data spread sheet and detailed analysis of attainment and progress in subjects in each year group, the performance of sub groups of pupils within each year group, evidence of the quality of teaching and behaviour and attendance data.

The Performance Analysis Meeting is a single item extended meeting focussed on raising achievement, developing teaching and improving behaviour. A range of actions and responsibilities for those actions is agreed at the meeting and the outcomes and actions are shared with the relevant staff teams. Immediately following the Performance Analysis Meeting, the SEF is updated and the Head of School writes their report for Governors.

Autumn Achievement Report
Immediately following the start of the new academic year, teachers analyse the outcomes for the classes they taught and produce a concise report that is submitted to the relevant team leader.

Team Leaders use these and their own analysis to write a detailed report on achievement (attainment and progress) in their specific areas of responsibility. This is completed by the end of week 2 of Autumn term and is discussed in a formal meeting with the Head of School. The outcomes of the AAR and formal meeting form basis of the Team Improvement Plan (TIP). The TIP will indicate the priorities for the subject under the same broad development themes as the School Improvement Plan. The TDP is submitted to the Head of School and is shared with all relevant teachers. This work is completed by the final day of the first half term.

Achievement, Teaching and Behaviour Reviews
Three times per year following data collections, school leaders analyse performance data. They produce a sharply focussed, concise report on the quality of achievement and teaching and a qualitative analysis of behaviour in their area of responsibility. The ATBR is submitted to the Head of School no later than 2 weeks following the data collection. The ATBR is the main agenda item of the following line management meeting and is used to update the TIP.

School Improvement Plan (SIP)
This is a 3-year plan that indicates the long-term priorities for the school identified as a result of internal and external monitoring and national and regional developments. Broader development themes are decided at leadership level and objectives are produced by all school leaders reflecting their individual responsibilities. The same themes guide school improvement planning and performance management objectives in school. The themes are consistent across all Trust schools and are agreed by the CEO, Executive Principal and Heads of School.

Progress against the SIP is reviewed four times per year by school leaders in the first instance and review dates for each objective are planned at the start of each academic year and is common in each Trust school. Following each review, the Head of School (or Executive Principal) meets with the CEO to review progress and significant updates are shared at the next trust team meeting. At each Local Governing Body meeting, review of the SIP is a standard agenda item. At the end of each year new objectives may be set and any still on going from the previous plan will be carried forward or subsumed in the new objectives.

Each school team has its own Team Improvement Plan (TIP) that has the same themes as the SIP. The TIP is reviewed by the relevant school leaders using the same timescales as review of the SIP.

Curriculum Subject Reviews
Curriculum team leaders periodically present their monitoring and evaluation analysis to the Head of School or governors in the form of a Subject Review. The Review will be made up of AAR, ATBRs, TIP and an Executive summary. Team leaders are not required to complete lengthy additional documentation or presentations. Following Autumn results analysis, governors will select one curriculum subject per term to present a subject review to the LGB throughout the year. Following each Performance Analysis Meeting, the Head of School will select up to 2 subjects to present a subject review. Where serious concerns about performance arise the Head of School may direct an Extended Subject Review consisting of lesson observations, learning walks, interviews and book scrutinies.

Line Management Meetings
All leaders meet staff whom they line manage on a regular basis to support them in their duties and responsibilities and to ascertain that those sections of the TIP and the SIP for which they are responsible are proceeding as expected and on target. The outcomes of these meetings are communicated through the meeting cycle to the Head of School. The frequency of these meetings may vary but are likely to be weekly for senior leaders and fortnightly for middle leaders. Other line management meetings, such as links with associate staff, may occur on a half-termly basis. The forms for recording discussion at LM meetings should be brought partially completed to the meeting by the attendee giving an indication of the topics for discussion, completed at the meeting and copied and filed by both parties as a record of discussions throughout the year.

Zoning
School leaders carry out zoning throughout the week on a rota basis to support teaching staff and student services, particularly where there has been an identified cause for concern. The focus of zoning is agreed by the Head of School and may be communicated to staff. It varies according to circumstances and need, but may include a review of behaviour, uniform, individual year groups or classes, subject areas and student movement thus giving a *snapshot* at particular points in the term and in the school week. Zoning also plays a crucial role in guaranteeing a high profile of school leaders around school and supporting pupil progress and

learning. The findings of zonings are recorded centrally and are reviewed weekly by the Head of School. Statistics and patterns of causes for concern are shared with Local Governing Bodies as part of the Head of School Report.

Learning Walks
School Leaders undertake learning walks regularly and focus on a specific area of teaching and learning. The findings are shared with teaching colleagues and summarised in the ATBRs. Statistics and patterns of causes for concern are shared with Local Governing Bodies as part of the Head of School Report.

Work Scrutiny
Pupils' books and folders are scrutinised to collect evidence on the achievement of pupils, quality of teaching and learning, behaviour of pupils and the quality of leadership and management. Work is scrutinised by leaders with two different purposes. Marking checks focus on consistency of marking and feedback; work scrutiny looks at progress, challenge, inclusion and impact of feedback. Additional learning conversations are conducted with groups of pupils and focus on progress, attitudes to learning, challenge, sufficiency and assessment.

Classroom observations
Observations are crucial in forming accurate judgements about teaching and learning, and leaders regularly undergo training and review their practice to ensure that they are consistent in their judgements.

Every teacher in each school is observed as part of their performance management cycle at least once a year but more regular observation can be expected when the colleague is an NQT, as part of a curriculum review, where support has been put in place as a result of concern about standards identified through other forms of monitoring or at the request of the teacher.

To ensure consistency in observations, a lesson observation form has been agreed across the Trust to reflect the Trust's expectations for teaching and learning and is used in all formal observations. The outcomes of all observations are recorded so that the school holds statistical evidence for the quality of teaching and learning and this is shared with Local Governing Bodies through the Head of School Report. Lesson observation outcomes are used by school leaders, alongside results and a range of other evidence to arrive at a moderated judgement on the quality of teaching and learning across the school. Following the observation, the form is sent to the Head of School.

Performance Management
All teaching staff undergo a process of performance management annually in line with the trust appraisal policy. This consists of an observed lesson, a self-evaluation process, a review of the previous year's targets and the setting of new targets against the school and departmental priorities. Each teacher has a reviewer who will observe an agreed lesson, review and set new targets. Training needs will also be agreed. A mid-year review will take place and this will form the focus for a line management meeting in the spring term.

Parent & Carer voice
A wide range of formal and informal methods is used to evaluate parental views including formal surveys, Ofsted's Parent View site, email contact and Head of School surgeries. Each school undertakes a Parent View style questionnaire at each parents' evening. The results of these questionnaires are shared with school leaders, Local Governing Bodies and the trust team.

Pupil Voice

The views of pupils are collated from a range of activities involving pupils both directly and indirectly. Each school's pupils' council has a system to record and report back to school leaders and governors and pupil leaders attend governors' meetings where appropriate.

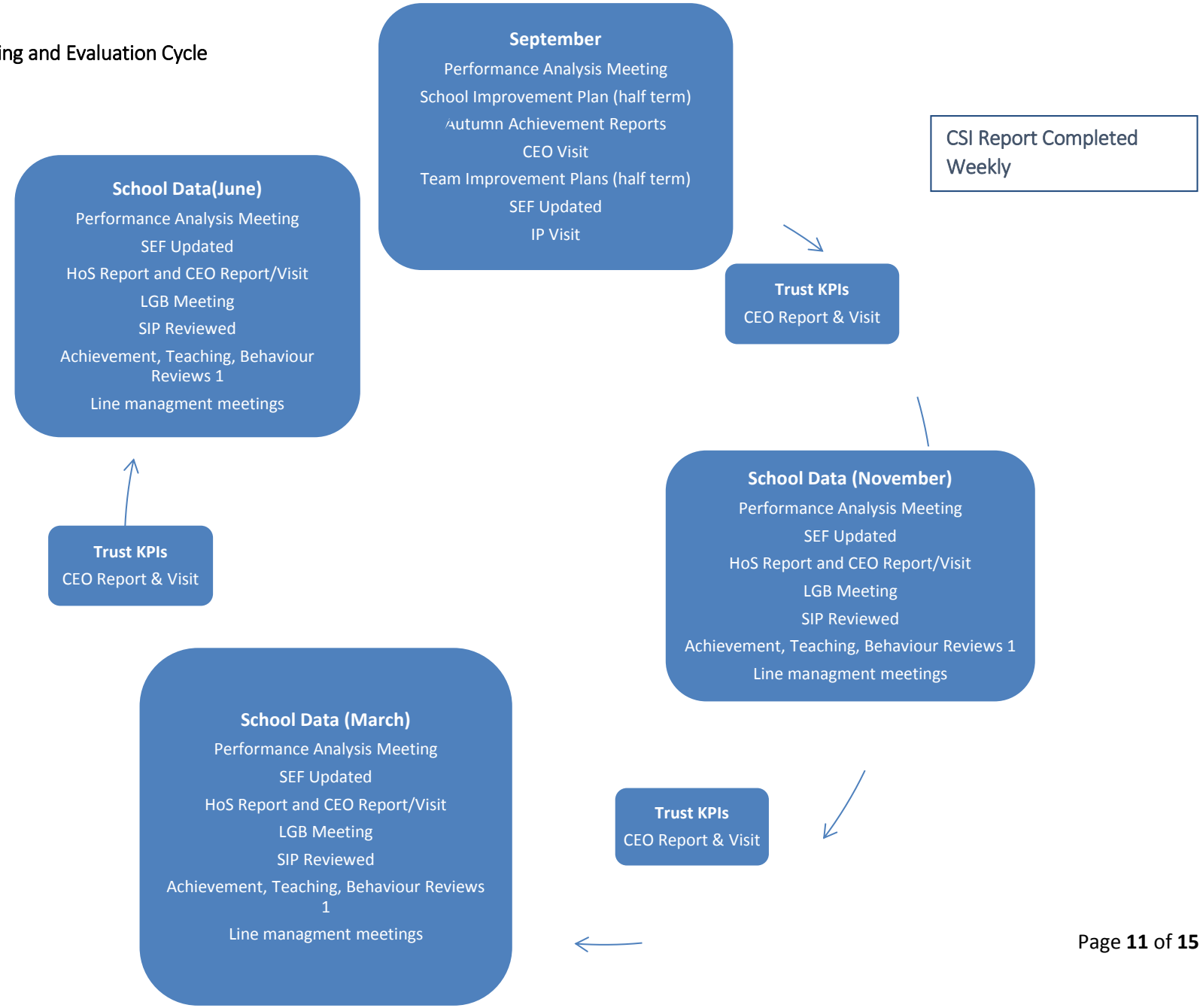
In addition, ATBRs carried out by school leaders should reflect the views of pupils through lesson observations and learning walks. The Head of School carries out regular booksees and issues arising from these are addressed.

Appendix 1: Trust and School KPI Collection Schedule

Date	Trust KPIs	Achievement Data	School Data
13 October	√	All Year Groups	
1 December	√	All Year Groups	√
26 January	√		
16 March	√	All Year Groups	√
11 May	√		
22 June	√	All Year Groups	√
20 July	*√ **		*√ **

***** End of year cumulative data

Appendix 2: Trust Monitoring and Evaluation Cycle



Appendix 3: School Monitoring and Evaluation Cycle

ONGOING MONITORING & EVALUATION

Lesson observations
Zoning
Learning walks
Book Scrutiny
Book sees

At each of the 4 points of the annual cycle, Leaders select 2 curriculum areas to present Subject Reviews to the Head of School

School Leaders may choose to conduct Extended Subject Reviews

September

Performance Analysis Meeting
School Improvement Plan (half term)
Autumn Achievement Reports
Department Improvement Plans (half term)
SEF Updated
Improvement Partner Visit

School Data (November)

Performance Analysis Meeting
Leaders select subjects for CurriculumReviews
SEF Updated
HoS Report and CEO Report/Visit
LGB Meeting
SIP Reviewed
Achievement, Teaching, Behaviour Reviews 1
Line management/ achievement meetings

School Data (March)

Performance Analysis Meeting
Leaders select subjects for Subject Reviews
SEF Updated
HoS Repor and CEO Report/Visit
LGB Meeting
SIP Reviewed
Achievement, Teaching, Behaviour Reviews 2
Line managment / achievement meetings

School Data (June)

SCHOOL LEADERS Performance Analysis Meeting
SCHOOL LEADERS select subjects for Subject Reviews
SES Updated
HoS Report and CEO Report/Visit
LGB Meeting
SIP Reviewed
Achievement, Teaching, Behaviour Reviews 3
Line managment/ achievement meetings

SCHOOL PLANNING

Head of School and school leaders review and update the 3 year School Improvement Plan in draft form in each summer term.

Subject leaders review and update Team Improvement Plans by October half term. Head of School and school leaders finalise School Improvement Plan by October half term.

Following each ATBR, Leaders review and update TIPs.

Following each SEF update, Head of School and school leaders update SIP.

Appendix 4:

School Improvement Processes

September
CEO Visit to analyse summer results (Full Day) Agree action for School Improvement Plan CEO and Head of School Plan deployment of Trust Director Support for Autumn Term Meeting of Local Governing Body
October
IP Visit (Full Day) Agree final School Improvement Plan

CEO QA Visit 1	CEO QA Visit 2	CEO QA Visit 3
Scrutinise Trust KPI 1 Scrutinise Data Review School Improvement Plan Review Trust Support	Scrutinise Trust KPI 2 Scrutinise Data Review School Improvement Plan Review Trust Support Prepare for LGB	Scrutinise Trust KPI 3 Scrutinise Data Review School Improvement Plan Review Trust Support
CEO QA Visit 4	**CEO QA Visit 5**	**CEO QA Visit 6**
Scrutinise Trust KPI 4 Scrutinise Data Review School Improvement Plan Review Trust Support Prepare for LGB	Scrutinise Trust KPI 5 Scrutinise Data Review School Improvement Plan Review Trust Support	Scrutinise Trust KPI 6 Scrutinise Data Review School Improvement Plan Review Trust Support Prepare for LGB

School Categories

A	School is at least Good in all areas. Sufficient capacity to improve own and other schools
B	School is at least Good in all areas. Sufficient capacity to improve own school. Limited capacity to improve others
C	School is Good but may not be secure in all areas. Sufficient capacity to improve own school with support.
D	School has significant weakness. Insufficient capacity to improve without focussed support.

Appendix 5:

The Education Alliance

CEO QA Visit

School		
Date	Visit Number	Category

Achievement

Evidence	Actions

KPI Review

Evidence	Actions

QA Activities

Learning walks/zoning/book scrutiny/student voice/staff voice/SL meeting/other

Evidence	Actions

School Improvement Plan

Progress since last visit, next steps

Evidence	Actions

Trust Team Deployment

Priorities	Actions

Review of school category

Date of next QA visit:

Appendix 6:

School:	Hunsley Primary
F/C:	

Inspire Aspire

Attendance	National 15/16:		School 15/16:				
	Y1	Y2	Y3	Y4	Y5	Y6	All
All							
Boys							
Girls							
PP							
Non PP							
SEN							

Behaviour	Y1	Y2	Y3	Y4	Y5	Y6	All
S3 - D							
S4 - I							

Staff Absence	Teacher	Associate
Days lost		
Long term		
Classes affected		

Teaching Issues	N	R	Y1	Y2	Y3	Y4	Y5	Y6

Predicted Outcomes	EYFS	Year 1	Key Stage 1 ARE			Key Stage 2 ARE			
	GLD	Phonics	R	W	M	RW M	R	W	M

Welfare		CPOMS	
Accidents		Racist incidents	
RIDDOR		Bullying incidents	
Homophobic incidents		FT Exclusions	

Teaching, Learning & Assessment Summary	
Focus of Curriculum	Impact of T, L and A

Zoning Summary			
Strengths	Issues and Actions	Impact of Actions	Further Actions

HR	Finance	Premises	Complaints

Overall Effectiveness