

Calibrating Feedback

A Model for Establishing Consistent Expectations of Educator Practice

Adapted from the Massachusetts Candidate Assessment of Performance

Participant Handouts

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# LEARNING

## Model Observational Protocol\*

The model protocol was developed with support and expertise from the National Institute for Excellence in Teaching (NIET) and is based in great part on NIET’s extensive experience conducting evidence-based observations and meaningful evaluation conversations that lead to improved practice. The Model Observation Protocol is provided as a resource and suggested framework. Its use is not a requirement

The Model Observation Protocol guides observers through several steps:

1. Before the Observation:
   * Preparing for the pre-conference
   * Conducting the pre-conference
2. During the Observation:
   * Actively collecting evidence
3. After the Observation:
   * Analyzing the evidence
   * Preparing for the post-conference
     + Identifying reinforcement/refinement objectives
   * Conducting the post-conference

Implementation of each step will, of course, vary depending on the type observation (announced v. unannounced) and whether one observer or multiple observers are participating.

### Before the Observation

Work done prior to the observation focuses around conducting a pre-conference. Therefore, these steps are only likely to be applicable for an announced observation as they require advance notification to the educator of the upcoming observation. The pre-conference can be an important opportunity to build rapport with the educator, establish a coaching relationship, and begin to collect evidence for the upcoming observation.

Ideally, the pre-conference occurs one to two days prior to the observation and lasts between 15-20 minutes.

*Preparing for the Pre-Conference*

Begin by gathering/reviewing evidence, including:

* Lesson Plan
* Lesson materials (e.g., assessment, handouts, etc.)
* Prior observations and feedback provided to educator

Review the lesson plan and associated materials for evidence of each of the six essential elements.

Observers may find it beneficial to draft a set of questions to aid in the conversation that occurs in the pre-conference. The observer should create questions that are likely to:

1. Generate additional evidence in support of the essential elements
2. Address any aspects of the lesson that may negatively impact of observation

\*The ESE Model Observation Protocol included in the CAP Guidelines includes pre- and post-conference planning forms and a candidate self-reflection form that are omitted here.

The pre-conference is short; to keep the conversation focused observers should prepare 2-3 questions keeping in mind the goals mentioned above. The following are examples of questions the observer may plan to ask in a pre-conference:

General Questions

* Tell me about the lesson I will observe.
* What do you expect students to know and be able to do at the end of the lesson?
* What kind of background do the students need to have for this lesson?
* Tell me about any challenges or specific areas of the rubric that you are currently working to strengthen.
* Is there anything else you would like me to know before the lesson?

Standards/Objectives

* How will you check for student mastery in the lesson?
* How will the learning objective be communicated to students?
* How do you plan to connect the lesson to previous learning?
* What type(s) of thinking will be evident in the lesson? How will students apply this thinking during the lesson?

Lesson Structure and Pacing

* Talk about the lesson structure (beginning, middle, and end).
* Talk about classroom procedures.
* How is the lesson structured for students that may progress at different learning rates?
* Talk about any anticipated learning difficulties that may occur during the lesson.

Activities and Materials

* How do the activities relate to the objective?
* How will you make the lesson relevant to students?
* Talk about the grouping that will be used in the lesson to maximize student learning.
* Talk about the strategies that will be used during the lesson to maximize student understanding.

If the observation is being conducted by multiple observers, the preparation should also be coordinated to ensure that the two observers have a unified focus and set of expectations for the observation.

*Conducting the Pre-conference*

Ideally, the pre-conference occurs one to two days prior to the observation and lasts between 15-20 minutes. A pre-conference should include the following: an introduction, a discussion based on the review of lesson materials, and a summary of next steps.

Pre-conference Introduction (2 min)

The introduction helps to set the tone and purpose of the pre-conference. While it may appear overly formal it can be valuable in establishing routines that help to keep the conversation focused and brief. Below is an example of one approach to the introduction of a pre-conference:

* Greeting: *“Thanks for taking the time to meet with me. I’m really looking forward to coming into your class on \_\_\_\_\_\_\_\_\_”*
* Time: “*This discussion should take us about 20 minutes”*
* Set Purpose: *“The purpose of our conversation is for you to help me to know what I can expect to see happen during the observation and for you to know what things I am specifically looking for.”*

Discussion of the Lesson (15 min)

Following the brief introduction, the observer should transition quickly into probing further on the educator’s intentions and plans for the lesson being observed. It is most productive when the observer has reviewed the lesson plan prior to this conversation and can ask specific, probing questions about the lesson. The educator should be doing the majority of the talking during this portion of the pre-conference. The observer should be capturing notes on the conversation. Below is an example of one approach to the discussion about the lesson:

* Reference review of materials: “*I reviewed the materials you sent me in advance and think I have a clear sense of the lesson but was hoping you could elaborate on a few points to be sure I understand your plan.”*
* Ask questions: see pre-conference preparation section for examples

Pre-conference Closure (3 min)

Observers should leave time at the end of the conference to summarize any takeaways from the conversation as well as align expectations for the upcoming observation. Below is an example of one approach to pre-conference closure:

* Revisit prior feedback: *“After our second observation, we agreed that you would work to [fill in] so I will be looking for evidence of that in the upcoming observation.”*
* Review the focus elements: *“Also, because this is the third observation, I will also be collecting evidence specifically for element [fill in] from the rubric.”*
* Summarize takeaways from the conversation: *“Based on what you shared with me during our conversation, it sounds like you are also looking for feedback on your transitions so I will be sure to make note of those as well.”*

### During the Observation

The primary goal of the observer during the observation is to actively collect evidence. Active evidence collection should capture both teacher and student behavior/actions. Active evidence collection does not include making judgments or inferences during the observation; this occurs after when the observer is analyzing and synthesizing the evidence. Evidence should reflect exactly what happens in the classroom. Evidence collected should include a balance of both summary statements as well as direct quotes.

Evidence collected during the observation is solely to aid the observer in identifying trends and selecting illustrative examples of aspects of performance. It is not designed to be shared directly with the educator.

### After the Observation

After an observation, observers review evidence collected and begin to analyze it as a measure of educator performance and then strategically plan for a post-conference in which educators are provided with targeted feedback.

Ideally, post-conferences occur one to two days following the observation and last between 20-30 minutes. Observers may also consider having the educator submit a written reflection prior to the post-conference. If adding this step, observers should plan to complete their analysis prior to reviewing the educator self-reflection.

*Analyzing & Categorizing the Evidence*

Following the observation, observers should review the evidence collected during the lesson and begin to fill in the evidence chart located in the Observation Form. When categorizing evidence, observers should consider the following:

* Not every piece of evidence collected during the observation needs to be sorted into the evidence chart.
* It is recommended that you consult the rubric when categorizing evidence.
* Evidence statements should not simply reiterate or restate the performance descriptors present in the rubric; the evidence should explain what happened in the observation that shows/does not show that a skill has been demonstrated.

*Preparing for the Post-Conference*

The primary purpose of the post-conference is to provide educators feedback about their performance during the observation. After categorizing evidence according to the elements, observer should work to identify specific areas of strength (reinforcement) and areas for improvement (refinement). The Post-Conference Planning Form can guide the development of this feedback.

Begin by gathering/reviewing evidence, including:

* Lesson Plan & Pre-Conference Planning Form
* Notes from Pre-Conference
* Observation Form that contains categorized evidence
* Educator self-reflection (if required)

For observations that are conducted by multiple observers, the observers should calibrate on the evidence categorized as well as the identification of areas for reinforcement/refinement. This must be done prior to meeting with the educator to ensure that the educator receives consistent, calibrated feedback about his/her performance.

*Identifying Reinforcement and Refinement Areas*

Observers identify for the educator areas of strength and areas for improvement. This does not preclude the educator from self-identifying areas as well. Areas of reinforcement and refinement should be tied directly to the elements of the rubric.

* **Reinforcement**: The area of reinforcement should identify the educator’s instructional strength in a way that encourages the continuation of effective practices in the future. The area of reinforcement should be deep rooted in student-based evidence that demonstrates successful positive impact on student learning.
* **Refinement**: The area of refinement should identify the areas in need of instructional improvement.

In reflecting on the analysis of the evidence, observers should select one to two (but no more than three) reinforcement and refinement areas. Observers are encouraged to select the reinforcement and refinement areas that are most likely to improve educator practice and have a positive impact on student learning.

There are several guiding questions and considerations that can support the identification of the effective reinforcement/refinement areas:

* Which areas of the rubric did the educator perform best (reinforcements) and which areas were most challenging (refinements)?
* Which of these areas would have the greatest impact on student achievement?
* Which of these areas would have the greatest impact on other areas of the rubric?
* In which area does the educator have the most potential for growth?
* Make sure that the reinforcement is not directly related to the refinement. It is important that educators see their area of strength as separate from their area needing improvement.
* Choose a refinement area for which you have sufficient and specific evidence from the lesson to support why the teacher needs to work in this area.
* Select refinement topics around which you are prepared to provide specific support. There is nothing worse than telling a educator they need to alter their practice and then not being able to provide specific examples for how this can be done.
* Understand the educator’s capacity when identifying an area of refinement. In other words, where will you get the biggest bang for your buck?
* Remember—reinforcements should be only to strengthen the educator’s performance. Do not hedge this part of the post-conference with qualifying statements such as “it could have been even better if,” or “next time you could also do…” Teachers need to hear what they are effective at, and have it be left at that.
* When developing the post-conference plan, consider identifying the area of refinement first. This will ensure that the reinforcement and refinement do not overlap.

Once you have identified the areas of refinement/reinforcement fill them in at the bottom of the Observation Form.

*Conducting the Post-Conference*

Ideally, the post-conference occurs one to two days prior to the observation and lasts between 20-30 minutes. Post-conferences should not occur immediately after the lesson as this does not allow for sufficient time for the observers to synthesize evidence and feedback or for the educator to adequately reflect.

A post-conference should include the following: an introduction, a discussion of reinforcement/refinement areas, and a summary of next steps.

Post-conference Introduction (5 min)

The introduction helps to set the tone and purpose of the post-conference. While it may appear overly formal it can be valuable in establishing routines that help to keep the conversation focused and brief. Below is an example of one approach to the introduction of a post-conference:

* Greeting: *“Thanks for taking the time to meet with me. I’m really looking forward to our discussion on the lesson I was able to see in action. ”*
* Time: “*This discussion should take us about 30 minutes”*
* Set Purpose: *“The purpose of our conversation is for us to identify both strengths and areas of improvement in your practice”*
* Probe for self-reflection: *“What are your thoughts about how the students responded to the lesson?”* OR if the educator already completed the self-reflection form, “*I saw from your reflection that…”*

Discussion of Reinforcement/Refinement Areas (20 min)

The discussion about strengths and areas for improvement should begin with outlining the areas of reinforcement and then transition to the areas of refinement. The observer should provide specific examples from the observation as evidence of the area of refinement or reinforcement. Below is an example of one approach to the discussion:

* Share areas of Reinforcement:
  + Provide evidence from observation: “*There were several instances throughout the lesson where you asked a variety of questions to check for student understanding. For example, after showing the pictograph you…”*
  + State impact on students: *“In doing so, students were required to justify their thinking and it allowed you to quickly identify misconceptions in students understanding.”*
  + Provide recommended action: “*Continue to…”*
* Share areas of Refinement:
  + Ask a self-reflection question: Ask a specific question to prompt the teacher to talk about what you want him or her to improve. Utilize a question that includes specific language from the rubric, which can lead the teacher to reflect on the indicator you have identified as his/her area of refinement as it relates to the lesson. Example: “*When developing lessons, how do you decide on the pacing of the lesson so sufficient time is allocated for each segment?”*
  + Share evidence from observation: “*You mentioned earlier that you wanted students to be able to work in groups and then report their findings. However, there was not sufficient time for this to occur during the lesson. According to the my notes, the first 6 minutes were spent organizing materials and transiting students; the next 23 minutes were spent with you modeling the objective at the board with some questions and answer time built in.”*
  + Provide concrete suggestions for how to improve: “*As you modeled how to analyze a pictograph, students could have worked with their group members to answer your questions prior to you providing the answer, then they could have reported to the class their findings. This would have still allowed you to model, but would have also allowed students to work together to analyze the pictograph. Students who may not have required this review could have worked independently in a group to analyze their own pictograph while the rest of the class participated in your modeling. This would have also allowed you to differentiate the pacing of the lesson to provide for students who progress at different learning rates. This lesson could also have been segmented into two different lessons.”*
  + Provide recommended action: “*Moving forward…*”
  + Share resource/support: *“As you work to further refine this skill, I think it might be helpful if you go and observe Mrs. Blank in 3rd grade who is highly-skilled in this area. I’ve already spoken with her and she has agreed to an observation and debrief next week.”*

Post-conference Closure (5 min)

Evaluators should leave time at the end of the conference to summarize any takeaways from the conversation. Below is an example of one approach to post-conference closure:

* Share Observation Form: *“I’ve categorized the evidence from the observation as well as recorded the reinforcement and refinement areas and actions here”* (Alternatively, you may have the educator fill in the refinement/reinforcement goals based on the discussion. Observers should, however, be sure that it is an accurate reflection of the intended objectives for refinement/reinforcement.)
* Leave time for questions: *“Do you have any other questions?”*
* Confirm next steps in process: *“The next observation will be unannounced and I will be focusing on evidence collection on the refinement goals we discussed today as well as rubric elements 1.A.4 and 2.B.1.”*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| What: |  | | How: |  |
| Who: |  | | | |
| Focus Elements: | |  | | |
| Focus Elements: | |  | | |

## Observation Form\*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *Pre-Observation Conference* | | | | | | | | | | |
| **Observation Details** | | | | | | | | | | |
| Date: | |  | | | Time (start/end): | | |  | | |
| Content Topic/Lesson Objective: | | | |  | | | | | | |
| |  | | --- | |  | | Whole Group | | |  | | --- | |  | | Small Group | | |  | | --- | |  | | One-on-One | | |  | | --- | |  | | Other |

|  |
| --- |
| *Active Evidence Collection occurred during the observation and is synthesized and categorized below.* |

|  |  |
| --- | --- |
| **Element** | **Evidence** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **Focused Feedback** | |
| Reinforcement Area/Action:  *(strengths)* |  |
| Refinement Area/Action:  *(areas for improvement)* |  |

\*Note: The CAP Guidelines include separate observation forms for each of the four required observations that indicate the focus elements.

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# PRACTICING

## Observation Form: Unannounced Observation #1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| What: | **Observation # 1** | | How: | **Announced** |
| Who: |  | | | |
| Focus Elements: | | 1.A.4 Well-Structured Lessons; 2.D.2 High Expectations | | |

|  |
| --- |
| *Pre-Observation Conference* |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Observation Details** | | | | | | | | | | |
| Date: | |  | | | Time (start/end): | | |  | | |
| Content Topic/Lesson Objective: | | | |  | | | | | | |
| |  | | --- | |  | | Whole Group | | |  | | --- | |  | | Small Group | | |  | | --- | |  | | One-on-One | | |  | | --- | |  | | Other |

|  |
| --- |
| *Active Evidence Collection occurred during the observation and is synthesized and categorized below.* |

|  |  |
| --- | --- |
| **Element**\* | **Evidence**\*\* |
| 1.A.4\* |  |
| 1.B.2 |  |
| 2.A.3 |  |
| 2.B.1 |  |
| 2.D.2\* |  |
| 4.A.1 |  |

|  |  |
| --- | --- |
| **Focused Feedback** | |
| Reinforcement Area/Action:  *(strengths)* |  |
| Refinement Area/Action:  *(areas for improvement)* |  |

\* *Observers must collect and document evidence for at least the focus elements. Focus elements are highlighted.*

## Model Observation Protocol: Post-Conference Planning Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Observation Details** | | | | |
| Date: |  | | Time (start/end): |  |
| Content Topic/Lesson Objective: | |  | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Refinement Area #1** | |  | | --- | |  | | 1.A.4: Well Structured Lessons | |  | | --- | |  | | 2.B.1 Safe Learning Environment |
| |  | | --- | |  | | 1.B.2: Adjustments to Practice | |  | | --- | |  | | 2.D.2 High Expectations |
| |  | | --- | |  | | 2.A.3: Meeting Diverse Needs | |  | | --- | |  | | 4.A.1 Reflective Practice |
| Self-Reflection Question(s) to prompt educator |  | | | |
| Evidence from Observation |  | | | |
| Recommended Action |  | | | |
| Potential Resources/Guided Practice/Training to support |  | | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Refinement Area #2** | |  | | --- | |  | | 1.A.4: Well Structured Lessons | |  | | --- | |  | | 2.B.1 Safe Learning Environment |
| |  | | --- | |  | | 1.B.2: Adjustments to Practice | |  | | --- | |  | | 2.D.2 High Expectations |
| |  | | --- | |  | | 2.A.3: Meeting Diverse Needs | |  | | --- | |  | | 4.A.1 Reflective Practice |
| Self-Reflection Question(s) to prompt educator |  | | | |
| Evidence from Observation |  | | | |
| Recommended Action |  | | | |
| Potential Resources/Guided Practice/Training to support |  | | | |

# 

# CALIBRATING

## Observation Form: Unannounced Observation #2

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| What: | **Observation # 2** | | How: | **Unannounced** |
| Who: | Supervising Practitioner & Program Supervisor | | | |
| Focus Elements: | | 1.B.2: Adjustment to Practice & Others as identified during the Formative Assessment | | |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Observation Details** | | | | | | | | | | |
| Date: | |  | | | Time (start/end): | | |  | | |
| Content Topic/Lesson Objective: | | | |  | | | | | | |
| |  | | --- | |  | | Whole Group | | |  | | --- | |  | | Small Group | | |  | | --- | |  | | One-on-One | | |  | | --- | |  | | Other |

|  |
| --- |
| *Active Evidence Collection occurred during the observation and is synthesized and categorized below.* |

|  |  |
| --- | --- |
| **Element**\* | **Evidence**\*\* |
| 1.A.4 |  |
| 1.B.2\* |  |
| 2.A.3 |  |
| 2.B.1 |  |
| 2.D.2 |  |
| 4.A.1 |  |

|  |  |
| --- | --- |
| **Focused Feedback** | |
| Reinforcement Area/Action:  *(strengths)* |  |
| Refinement Area/Action:  *(areas for improvement)* |  |

\* *Observations must collect and document evidence for at least the focus elements. Focus elements are highlighted.*

## Model Observation Protocol: Post-Conference Planning Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Observation Details** | | | | |
| Date: |  | | Time (start/end): |  |
| Content Topic/Lesson Objective: | |  | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Refinement Area #1** | |  | | --- | |  | | 1.A.4: Well Structured Lessons | |  | | --- | |  | | 2.B.1 Safe Learning Environment |
| |  | | --- | |  | | 1.B.2: Adjustments to Practice | |  | | --- | |  | | 2.D.2 High Expectations |
| |  | | --- | |  | | 2.A.3: Meeting Diverse Needs | |  | | --- | |  | | 4.A.1 Reflective Practice |
| Self-Reflection Question(s) to prompt educator |  | | | |
| Evidence from Observation |  | | | |
| Recommended Action |  | | | |
| Potential Resources/Guided Practice/Training to support |  | | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Refinement Area #2** | |  | | --- | |  | | 1.A.4: Well Structured Lessons | |  | | --- | |  | | 2.B.1 Safe Learning Environment |
| |  | | --- | |  | | 1.B.2: Adjustments to Practice | |  | | --- | |  | | 2.D.2 High Expectations |
| |  | | --- | |  | | 2.A.3: Meeting Diverse Needs | |  | | --- | |  | | 4.A.1 Reflective Practice |
| Self-Reflection Question(s) to prompt educator |  | | | |
| Evidence from Observation |  | | | |
| Recommended Action |  | | | |
| Potential Resources/Guided Practice/Training to support |  | | | |