Education and Children's Services Directorate

Effective Planning, Tracking and Monitoring to meet the needs of all learners in Fife's schools.

Guidance for all teachers and school leaders

June 2023 (FINAL)
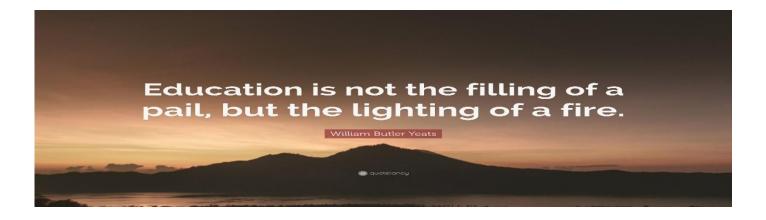
Improving life chances for all

Rationale

For some time, there has been debate amongst teaching professionals around the purpose, focus and workload implications of forward planning in primary schools. As a profession committed to getting it right for our learners, we agree that effective planning of learning, teaching and assessment will ensure that our learners are enabled to make maximum progress in their learning, and achieve or exceed national expectations as they progress through the broad general education and into the Senior Phase.
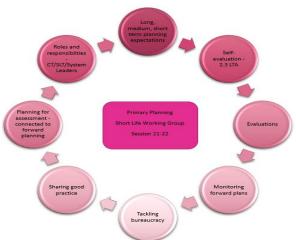
Teachers have a professional responsibility as outlined in the [refreshed GTCS Standard for Full Registration, 2021](#) to have a depth of knowledge and understanding of Planning for Assessment, Teaching and Learning (2.1.4). ['How Good is Our School 4', 2015](#) highlights as a feature of highly effective practice that:

- planning is proportionate and manageable and clearly identifies what is to be learned and assessed.
- assessment approaches are matched to the learning needs of learners and are used to support them to demonstrate where they are in their learning.

A Short Life Working Group (SLWG) with representation from classroom teachers, school leaders and professional associations was established in November 2021. The group had a clear focus to refresh the current planning guidance (2013) to support teachers and school leaders to design and implement approaches to the planning of learning, teaching and assessment that best meet the needs of all learners in all areas of the curriculum.

The DRAFT guidance was shared in October 2022 with all senior leaders and teachers to consult with them on their views. Feedback received through professional discussions and an online MS FORM was used to adapt the guidance to ensure that all views had been taken into account.

The following guidance is intended to address a number of key areas as identified by the SLWG and to give practical guidance to teachers and school leaders to support professional dialogue around effective planning for learning, teaching and assessment. Areas for Consideration as agreed by the SLWG are highlighted in the diagram below:

Fife Education & Children's Service is committed to supporting our teachers and school leaders to develop and implement approaches to planning learning, teaching and assessment that are effective, proportionate, flexible, and which gives teachers a clear framework to plan for progression in learning.

It is essential that through creative and flexible approaches to forward planning teachers are allowing all of our learners to experience their entitlement to a broad general education with learning designed to provide opportunities for:

- *Breadth*
- *Depth*
- *Challenge & Enjoyment*
- *Personalisation & Choice*
- *Coherence*
- *Relevance*
- *Progression*

This should also take into account the Four Context for Learning:

- *Interdisciplinary learning*
- *Curriculum areas and subjects*
- *Ethos and life of the school*
- *Opportunities for personal achievement*

Background

In 2015 the Curriculum for Excellence Working Group on Tackling Bureaucracy listed that one of the key causes of bureaucracy was, **"Over-detailed planning processes** - *Planning at the level of every individual experience and outcome, planning with too many layers and too much repetition. A lack of balance between written planning and planning based on professional dialogue."*

After an extensive consultation with teaching professionals', they reported that, *"forward planning should be proportionate: there is no need to plan, assess, record and report at the level of each and every Experience and Outcome. Forward planning should support professional dialogue rather than simply fulfil an audit function."* This includes agreement around what documentation is being used for planning to ensure that teachers are not duplicating the same information e.g. using both progression pathways and records of understanding for planning purposes.

Since the publication of this report continued discussion has taken place around the need to ensure that as professionals, we are getting the balance right between forward planning as an essential tool for teachers to plan high-quality experiences for their learners and being a process, which does not lead to improved outcomes for our learners in Fife.

As part of the empowerment agenda and the promotion of professional autonomy we need to take cognisance of the ways in which we guide and influence how teachers are planning to ensure children receive their entitlement to a high-quality LTA experience as they are best placed to identify the approaches to LTA that work best for their learners.

Underpinning Principles of Effective Planning

"Planning can be done in many ways, but the most powerful is when teachers work together to develop plans. Develop common understandings of what is worth teaching, collaborate on understanding their beliefs of challenge and progress, and work together to evaluate the impact of their planning on student outcomes."

(Hattie, J, 2012)

- Planning should allow for all learners to develop the four capacities of Curriculum for Excellence – Successful Learners, Effective Contributors, Responsible Citizens and Confident Individuals.
- Planning should take into account the CfE Experiences and Outcomes for all curricular areas across the appropriate level for children and young people. Where progression pathways have been developed these should be used to ensure that learners are experiencing progression in their learning.
- Diagnostic, formative and summative assessment information should be used by teachers to plan for next steps in learning to allow for breadth and depth as well as progression in learning.
- Approaches to interdisciplinary learning should be developed at school level to allow for learners to experience a coherent curriculum. This will allow for opportunities to bundle Experiences and Outcomes across curriculum areas.
- Planning should take into account the responsibility of all to embed Literacy, Numeracy and Health and Wellbeing across all curriculum areas.
- Opportunities for learners to be involved in decision-making in relation to planning for next steps should be built into forward planning. This may be in relation to their own individual next steps or for areas within the curriculum and learning environment.
- Planning should take into account the skills for life, learning and work learners are developing across each of the curriculum areas. Building the Curriculum 4 – Skills for life, skills for learning and skills for work.
- Planning should be flexible to allow teachers the ability to adapt plans using assessment information gathered throughout the school year, term, week.
- Planning should provide teachers with autonomy to plan for creative learning experiences for learners to allow for support, challenge, enjoyment and choice in learning.
- Planning should be teacher led and not resource driven to allow autonomy for teachers in planning for creativity across the curriculum.
- Where practicable, teachers should be given opportunities to plan together across the CfE Experiences and Outcomes, for example, where there are multiple classes at one stage or across a CfE level. Time for this will be agreed as part of Working Time Agreements (LNCT 12).

Forward Planning Expectations (long-term, medium-term, short-term)

In the best examples:

Long Term Planning

- Is the golden thread that drives the learning experiences for children throughout the academic year,
- Is a map of the teacher intentions for all areas of the curriculum across the school year which ensures appropriate pace and challenge for all.
- Is adaptable and used as a working document to reflect the evolving learning journey for children as the academic year progresses.

- Takes into account interdisciplinary approaches to learning which includes links to partnership working, educational visits e.g. local community and calendar year events.

Medium Term Planning

- Progression pathways are used to ensure appropriate pace, challenge and progression in learning for all learners.
- Progression pathways are used to support teachers to plan across all curricular areas, breaking them down into context, learning and teaching, assessment and resources required.
- Is not only the highlighting or completion of progression pathways. These are used to support teachers to plan for progression across the Experiences and Outcomes and to identify how they are planning for learning and teaching experiences.
- There is not an expectation that teacher write out experiences and outcomes in full.
- Supports transitions at all stages across the school including key transition stages N-P1 and P7-S1.
- Where composite classes exist teachers working with senior leaders agree approaches to stage planning to ensure that there is no duplication of plans and/or records of understanding and that teaching staff work collaboratively to plan across stages.

Short-Term/Weekly Planning

"Effective planning provides a clear framework to support and give guidance to teachers, whilst encouraging creativity, flexibility and engagement. It is not the expectation that there is a need for a monitoring of weekly/daily planning as teachers are responsible for their own continual professional planning using their integrity and judgments."

- Teachers and Senior Leaders engage in professional dialogue to agree the best approach for weekly planning formats best suited to the school context and individual classroom practitioners.
- Teachers are given autonomy to plan for daily learning and teaching experiences best suited to their own individual professional judgements taking into account agreed school approaches.
- Teachers use ongoing assessment and evaluations to identify and plan for next steps in learning for all learners.
- Teachers use long term and medium-term plans and progression pathways to plan progressive learning experiences for their learners.

Self-Evaluation QI 2.3 Learning, Teaching and Assessment

In the best examples:

- Quality improvement activity is ongoing throughout the school year and responsive to the needs of the setting.
- Senior leaders provide opportunities for teachers to evaluate forward plan arrangements as part of quality improvement activity to meet the needs of all learners.
- Where agreed by both *all* teachers and senior leaders in a school the use of digital technologies (online planning) is allowing for plans to be updated as and when required.
- Self-evaluation evidence is gathered from all stakeholders and decisions regarding forward planning are taken collaboratively to meet the holistic needs of all learners.
- The features of highly effective practice and challenge questions from HGIOS4 2.3: learning, teaching and assessment are used to promote professional dialogue and support collaborative decision-making around forward plan arrangements.

Monitoring & Evaluating Forward Plans

In the best examples:

- High-quality opportunities for senior leaders and teachers to enter into professional dialogue around planning for progression and meeting the needs of all learners are planned for throughout the school session to allow discussion to inform next steps for learners. These are a part of attainment meetings or progression overview meetings and not separate to these as all inform the planning process.
- Whilst the quality of professional dialogue at forward planning meetings is key to ensuring that all have an understanding of what learners have achieved and their next steps in learning, teachers take time to evaluate the work of their learners in advance of meetings to inform professional dialogue.
- Where required, for assessment purposes, written evaluations are manageable, proportionate and do not duplicate from other sources and are for a clear purpose e.g. where children have an identified additional support need, Child's Plan, needs of individual or groups of learners, where assessment data (NSA) has identified a specific gap in learning.
- Forward planning meetings have a clear, agreed agenda which allows teachers to prepare for and enter into robust professional discussions about their learners at key points throughout the year. This also includes discussions around tracking and attainment data to inform next steps for learning and teaching.
- A recorded note of forward planning meetings is taken at the meeting, highlighting key points discussed, and shared with all present. This acts as a written record of teacher evaluations of learning, agreed next steps and other relevant information pertinent to the discussions which took place.
- Whilst forward planning documents are seen as integral part of learning, teaching and assessment and as such a working document, senior leaders with responsibility for self-evaluation for self-improvement activity may, as part of the school's Quality Improvement Calendar, include the monitoring of forward plans. Feedback from monitoring of forward plans should be proportionate and support class teachers to plan for progression across the broad general education. It should not be handing in of planning folders for 'marking' or checking of grammatical/spelling errors and should focus on feedback in relation to learning and teaching and the seven curriculum design principles.
- Schools agree collaboratively expectations for forward planning to ensure consistency for all learners and to offer a platform for support/challenge if required in future.
- School leaders support practitioners to understand forward planning rationale and processes through ongoing professional dialogue.
- School leaders take responsibility for monitoring and evaluating pace and progression and provide constructive, high-quality feedback to teachers.

Planning for Assessment

In the best examples:

- Teachers have a clear understanding of what they want their children to learn rather than on the activity they want the children to do. Using the learning as a focus supports teachers to plan learning and teaching effectively.
- Teachers agree with school leadership teams how they will record their plan for assessment at each stage of the planning process.

- Assessment and forward planning are interrelated and time for both is reflected in Working Time Agreements (LNCT 12).
- Schools have used professional reading, for example *'Teaching Backwards'*, to agree consistent approaches for planning and assessment.
- Moderation activity is built into Working Time Agreements (LNCT 12) for teaching staff to work together to plan at all stages of the moderation cycle which includes planning for assessment.
- Schools and clusters have made good use of their Assessment Co-ordinators and QAMSOs to support the moderation of planning across all stages/schools.

Special Schools/Additional Support Classes (ASC)/Pupil Support Services (PSS)

Whilst the above guidance is for primary practitioners, this guidance is intended for use across mainstream primary schools. Our special school, ASC provisions and PSS provision have identified planning processes which meet the needs of the individual learners within classes who have identified severe and complex needs. These processes have been agreed across the special school and ASC network and differ from those requirements on mainstream primary school teachers. The Special Schools/ASC/DAS OneNote Planning Toolkit was launched in September 2022 and shared with all practitioners working within special schools and provisions.

Sharing Good Practice

In order to support collaborative practices, it is essential that as a profession we share good practice within and beyond individual school establishment boundaries. As we move forward, we will begin to share examples of good practice with those across the Fife learning community. Examples will be sought from across establishments where it is recognised there are elements of good practice. This will support school leaders and practitioners to continue to engage in professional dialogue around planning for learning, teaching and assessment.

Roles & Responsibilities (underpinned by GTCS Standards & HGIOS4)

Role		
Responsibilities (GTCS Refreshed Standards)		
Fully Registered Member	**Middle Leader (PT/DHT)**	**School Leader (HT)**
2.1.4: Have a depth of knowledge and understanding of planning for Assessment, Teaching and Learning: As a registered teacher you are required to demonstrate a depth of knowledge and understanding of: • How to plan for effective assessment, teaching and learning, individually and collaboratively, across different contexts, and in order to support the needs of every learner. • How to adapt planning approaches to ensure that the needs of every learner are effectively addressed. • Individual and collaborative approaches to a wide range	**3.1.2** • ensure all learners and colleagues meaningfully participate in decisions related to the development and planning of learning opportunities. • facilitate a culture which promotes and sustains high-quality curriculum practices (including pedagogy and assessment). • model and support, high expectations of curriculum in order to provide all learners with creative and consistently high-quality learning experiences and pathways and opportunities for learning to be	**3.1.1** • develop and establish appropriate curriculum design and planning processes to meet the learning, health and well-being needs of all learners. • ensure curriculum design and planning processes are well informed to ensure learners with support for learning needs experience a curriculum that meets their needs. **3.1.2** • develop a culture which promotes and sustains high-quality curriculum practices (including pedagogy and assessment).

of assessment, recording and reporting as an integral part of learning and teaching. • National assessment requirements and requirements of other relevant awarding bodies. • The positive impact of engaging learners in dialogue about their progress and how to provide meaningful feedback to support and agree next steps.	transformative in terms of challenging assumptions and expanding world views. • establish and develop processes to systematically gather, analyse and make effective use of assessment feedback and learners' progress data to evaluate, inform and plan future learning which meet the learning and well-being needs of every learner. • develop, enhance and share practices which promote improvements in curriculum practices, ensuring and maintaining a focus on the interests of children and young people. **3.1.3** • actively promote and engage in collaborative professional dialogue, critical reflection and self-evaluation with your team or teams across the school, as a way of proactively monitoring and reviewing pedagogy • support a range of peer learning approaches which enable teams to work collaboratively and provide systematic opportunities to enhance and refresh teachers' pedagogic and assessment practices. • agree, develop and establish processes to validate and enhance the quality of curriculum practices (including pedagogy and assessment practices). **3.2.2** • establish and enhance opportunities which enable every learner to participate meaningfully in the planning, evaluation and decision making related to their learning and progress, their school and the wider learning community • provide opportunities for learners and colleagues to	• agree and communicate clearly high expectations of curriculum in order to provide all learners with creative and consistently high-quality learning experiences and opportunities for learning to be transformative in terms of challenging assumptions and expanding world views. • engage with colleagues and the learning community to develop strategic assessment practices, outlining the principles, purposes, uses, impact and sharing of any data gathered. **3.1.3** • agree, develop and establish processes to validate and enhance the quality of curriculum practices (including pedagogy and assessment practices). **3.4.2** • enable and support colleagues in using a wide range of information to plan curriculum (pedagogy, assessment and reporting) with a focus on improving outcomes for all learners.

	plan and discuss learning, ensuring appropriate opportunities for personalisation and choice. **3.4.2** • enable and support colleagues in using the information to plan curriculum (pedagogy, assessment and reporting) with a focus on improving outcomes for all learners. • ensure assessment and evidence of assessments are robust and appropriate for internal and external purposes.	

How Good is Our School 4 **QI 2.3 – Learning, Teaching and Assessment**	
Features of highly effective practice	**Challenge Questions** (the following questions should be used to support professional dialogue and discussion to evaluate the approaches to planning for learning, teaching and assessment)
• Planning is proportionate and manageable and clearly identifies what is to be learned and assessed. • Assessment approaches are matched to the learning needs of learners and are used to support them to demonstrate where they are in their learning. • Processes for assessment and reporting are manageable and very effective in informing improvements in learning and teaching.	• How well do we employ a wide range of innovative and creative resources and teaching approaches, including digital technologies? • How well do we apply the principles of planning, observation, assessment, recording and reporting as an integral feature of learning and teaching? • How well do we make use of a range of valid, reliable and relevant assessment tools and approaches to support the improvement of children and young people's learning? • How effectively do we involve learners and parents in planning and evaluating learning?