



**Folio**  
COLLABORATIVE

# 15 Faculty Coaching Conversation & Observation Templates



# Contents

We would like to express our sincere gratitude to the following member schools for sharing their form templates. Their examples served as invaluable inspiration for the development of our own templates.

Austin Preparatory School  
Fordham Preparatory School  
Shady Hill School  
St. Lukes School  
Stone Ridge School of the Sacred Heart  
The Prairie School

- **Goals Meeting Exemplars**
- **Mid-Cycle Exemplars**
- **Pre-Observation Exemplars**
- **Formal Observation Exemplars**
- **Informal Observation Exemplars**
- **Year End Exemplars**



# Goals Meeting Template

- **Welcome and Introduction**
  - Check in to ensure they are in a place to have this conversation
  - Brief overview of the meeting's purpose
- **School Mission and Vision**
  - Briefly summarize the school's mission and vision.
- **Goal Setting**
  - Review and refine goals
  - Align individual goals with team and organizational objectives
- **Action Planning**
  - Identify necessary steps to achieve each goal
  - Assign responsibilities and resources
  - Set deadlines for key milestones
- **Potential Obstacles and Solutions**
  - Discuss potential challenges
  - Brainstorm strategies to overcome obstacles
- **Support and Resources**
  - Identify any additional support or resources needed
- **Recap and Next Steps**
  - Summarize key decisions and action items

## Comments:

Please provide any additional comments or feedback regarding the employee's goals and action plan.



# Mid-Cycle Template

## **Goal Reflection:**

- Overall, how satisfied are you with progress towards your goal(s)?
- What successes can you identify in terms of progress towards your goal(s)?
- What challenges have you experienced along the way?
- What adjustments are needed for you to reach your goal(s)?
- What are your next steps in terms of continuing to advance the work related to your goal(s)?
- What have you learned about yourself and your work style?
- What areas do you need to improve on?

## **Professional Development & Growth:**

- What additional support or resources would be helpful in achieving your goals?
- What professional learning opportunities would you like to pursue?

## **Feedback & Suggestions**

- What feedback do you have for me that will help me become more effective in how I lead our team?
- How do you feel about the overall school climate and culture?

## **Overall Reflections:**

- Please share any overall thoughts or feelings about the first half of the year.
- Is there anything that we need to discuss or revisit?



# Mid-Cycle Template

**Meeting Objective:** To review goal progress, identify areas for improvement, and celebrate accomplishments.

## Agenda Items:

- **Goal Review and Progress Assessment:**
  - Review the goals set at the beginning of the cycle.
  - Assess the progress made towards each goal.
  - Identify any areas where progress has been slower than expected.
- **Challenges and Obstacles:**
  - Discuss any challenges or obstacles that have hindered progress.
  - Brainstorm potential solutions or strategies to overcome these challenges.
- **Celebration of Accomplishments:**
  - Recognize and celebrate the supervisee's achievements and contributions.
  - Highlight specific instances where the supervisee has exceeded expectations or made a significant impact.
  - Express appreciation for their hard work and dedication.
- **Feedback and Coaching:**
  - Provide constructive feedback on the supervisee's performance.
  - Offer coaching and guidance to help the supervisee address any areas of improvement.
- **Goal Adjustment and Refinement:**
  - If necessary, adjust or refine the goals based on progress and feedback.
  - Ensure that the goals remain aligned with the supervisee's career aspirations and the organization's objectives.
- **Action Planning:**
  - Develop a detailed action plan for the remaining cycle.
  - Outline specific steps, deadlines, and resources needed to achieve the goals.
  - Assign responsibilities and accountability for each action step.
- **Support and Resources:**
  - Identify any additional support or resources that the supervisee may need to achieve their goals.
  - Discuss potential training, mentorship, or coaching opportunities.
- **Open Discussion:**
  - Provide an opportunity for the supervisee to raise any concerns or questions.
  - Address any issues or concerns that may be impacting progress.

## Follow-Up Actions:

- Summarize key points discussed and agreed-upon action steps.
- Schedule a follow-up meeting to review progress and provide additional support.



# Mid-Cycle Template

**Meeting Objective:** To review goal progress, identify areas for improvement, and celebrate accomplishments.

## Agenda Items:

- **Goal Review and Progress Assessment:**
  - Review the goals set at the beginning of the cycle.
  - Assess the progress made towards each goal.
  - Identify any areas where progress has been slower than expected.
- **Challenges and Obstacles:**
  - Discuss any challenges or obstacles that have hindered progress.
  - Brainstorm potential solutions or strategies to overcome these challenges.
- **Celebration of Accomplishments:**
  - Recognize and celebrate the supervisee's achievements and contributions.
  - Highlight specific instances where the supervisee has exceeded expectations or made a significant impact.
  - Express appreciation for their hard work and dedication.
- **Feedback and Coaching:**
  - Provide constructive feedback on the supervisee's performance.
  - Offer coaching and guidance to help the supervisee address any areas of improvement.
- **Goal Adjustment and Refinement:**
  - If necessary, adjust or refine the goals based on progress and feedback.
  - Ensure that the goals remain aligned with the supervisee's career aspirations and the organization's objectives.
- **Action Planning:**
  - Develop a detailed action plan for the remaining cycle.
  - Outline specific steps, deadlines, and resources needed to achieve the goals.
  - Assign responsibilities and accountability for each action step.
- **Support and Resources:**
  - Identify any additional support or resources that the supervisee may need to achieve their goals.
  - Discuss potential training, mentorship, or coaching opportunities.
- **Open Discussion:**
  - Provide an opportunity for the supervisee to raise any concerns or questions.
  - Address any issues or concerns that may be impacting progress.

## Follow-Up Actions:

- Summarize key points discussed and agreed-upon action steps.
- Schedule a follow-up meeting to review progress and provide additional support.



# Mid-Cycle Template

## **Overall Assessment:**

- How would you rate your overall performance during this cycle? (Excellent, Good, Needs Improvement, Unsatisfactory)
- What are your primary strengths and areas for improvement?

## **Goal Progress:**

- Have you achieved your goals for this cycle? If not, why?
- What obstacles or challenges have prevented you from achieving your goals?

## **Professional Development:**

- Have you participated in any professional development activities during this cycle? If so, how have these activities benefited your teaching?
- What additional professional development opportunities would you like to pursue?

## **Feedback and Support:**

- Have you received the necessary feedback and support from your supervisor or colleagues?
- What additional support or resources do you need to be successful?

## **Work-Life Balance:**

- How would you rate your work-life balance during this cycle?
- What strategies have you implemented to manage stress and maintain a healthy work-life balance?

## **Reflections and Insights:**

- What have you learned about yourself as a teacher during this cycle?
- Are there any changes or adjustments you would like to make to your teaching practices?

## **Celebration of Accomplishments:**

- What are you most proud of achieving during this cycle?
- How have your accomplishments contributed to the success of your students?

## **Future Goals:**

- What are your goals for the next cycle?
- How will you measure your progress towards these goals?

## **Additional Comments:**

Please use this space to share any additional thoughts, concerns, or suggestions.



# Mid-Cycle Template

## Meeting Objectives:

- Review progress towards goals set at the beginning of the cycle.
- Provide feedback and support.
- Discuss areas for improvement and development.
- Set goals for the remaining cycle.

## Goal Progress:

Goal	Progress	Challenges	Action Steps

## Feedback and Support:

- Strengths:
- Areas for Improvement:
- Support and Resources:

## Professional Development:

- Needs:
- Opportunities:

## Goals for the Remaining Cycle:

- Goals:
- Timeline:

## Follow-Up:

- Next Meeting:
- Action Items:

## Additional Notes:



# Mid-Cycle Template

## Meeting Objectives:

- Review progress towards goals set at the beginning of the cycle.
- Provide feedback and support.
- Discuss areas for improvement and development.
- Set goals for the remaining cycle.

## Goal Progress:

Goal	Progress	Challenges	Action Steps

## Feedback and Support:

- Strengths:
- Areas for Improvement:
- Support and Resources:

## Professional Development:

- Needs:
- Opportunities:

## Goals for the Remaining Cycle:

- Goals:
- Timeline:

## Follow-Up:

- Next Meeting:
- Action Items:

## Additional Notes:



# Formal Pre-Observation Template

In order to better prepare for your formal class visit, please fill in the items below with your planning for the lesson. Please complete **at least 24 hours before the visit occurs**.

Please attach any necessary course materials that would help the visitor to have a more complete understanding of the lesson.

<b>Class Visit (Teacher Name):</b>	<b>Visitor (Visitor's Name):</b>
<b>Course Section &amp; Number:</b>	<b>Date &amp; Period:</b>
<b>Room Number:</b>	<b>Number of Students:</b>
<b>Unit/Lesson:</b>	<b>Aim of Lesson:</b>
<b>Students will be able to:</b>	<b>Potential interdisciplinary connections:</b>

**I am seeking feedback on (insert an "X" in all that apply):**

<b>General Feedback</b>	<b>Questioning Strategies</b>	<b>Assessment Strategies</b>	<b>Student Engagement</b>
<b>Something new I'm trying (describe):</b>			
<b>Other (describe):</b>			

- **Context** - The context of the material in the student's life inside and/or outside of the classroom before and/or after this lesson.
- **Experience** - The learning opportunity that you are providing for the students.
- **Reflection** - Students are given the opportunity to consider and react to what is going on in the lesson.
- **Action** - Students do something based on their completed learning.
- **Evaluation** - Analysis of student growth, feedback.



# Formal Observation Template

## **Commendations:**

These are just some of the things you do well. Continue doing them as your teaching becomes even stronger.

- Context:
- Experience:
- Reflection:
- Action:
- Evaluation:

## **I Noticed:**

These are things I saw during the class visit that are worthy of noting. They might be helpful in developing a more comprehensive picture of the classroom experience.

- 

## **Have You Considered?**

These are ideas to consider from a different perspective. Your consideration of them may help your long-term development as a teacher.

- 

## **Was the aim of the lesson achieved?**

- 



# Formal Observation Template

**Time:**

**Grade Level:**

## Classroom Environment

- **Physical Setup:** [Describe the physical layout of the classroom, including seating arrangement, use of space, and materials.]
  -
- **Climate:** [Describe the overall atmosphere of the classroom, including student engagement, noise level, and interactions.]
  -

## Teacher Behavior

Behavior	Observation	Comments

## Student Behavior

Behavior	Observation	Comments

## Overall Assessment

- **Strengths:**
  -
- **Areas for Improvement:**
  -
- **Recommendations:**
  -

## Additional Notes:

- 



# Formal Observation Template

Skill	<b>Strong - S</b> <b>Developing - D</b> <b>Needs Attention - N</b> <b>Not Yet Observed - NYO</b>	Comments
Implements questions, tasks, and activities that are aligned to grade-level standards		
Facilitates academic conversations that center student voice and leadership		
When needed, provides direct instruction and scaffolds to support academic skill development		
Provides just-in-time supports to scaffold grade-level content.		
Implements lessons that will support students' grade-level work		
Designs lessons to meet a grade-level learning target		
Communicates clear, co-created classroom norms, routines, procedures, and expectations about teacher and student roles for each activity		
Clearly explains the purpose of the lesson, activities, and follow-up questions to student responses		
Provides adequate wait time to allow students to process and answer questions		
Provides opportunities for students to share their thinking, including those who are not volunteering to participate		
Provides positive feedback to encourage student effort		
Communicates warmth and mutual respect in interactions with students		
Provides frequent checks for understanding		
Holds students accountable for their learning		
Adjusts tasks to meet the needs of individual learners to demonstrate mastery of skill		

## Additional Feedback:



# Informal Observation Template

**Course and Section Number:**

**Day and Period:**

**Room Number:**

**Number of Students:**

**Summary / Highlights**

- 

**I like...**

- 
- 
- 

**I noticed ...**

- 
- 
- 

**Have you considered ...**

- 
- 



# Year End Template

## Professional Learnings & Things to Keep Doing

- In a few sentences, describe “what happened this year.”
- What is one thing you learned this year that will inform your teaching or work in the future?
- How would you summarize your learning during the past school year?
- In what ways do you think you have grown as an educator this year?
- What is really helpful/useful/important for you to keep in mind moving forward?
- What practices, strategies, approaches, or assignments were successes for you and your students - so you want to **KEEP** or improve upon them?
- What is something you tried in your classroom this year for the first time? How did it go?

## Goal Setting for Next Year

- Looking back at the goals you set for yourself at the beginning of the year, how are you feeling about the progress you made? What are you still wondering about?
- Reflect on the lessons you learned, as well as the knowledge and skills you acquired, and analyze one way in which you could do better moving forward.
- What would you like to learn this summer, and how?
- How will you use these reflections to inform your professional growth this summer and in your goals next academic year?



# Year End Template

**Please note:** You are **not** expected to answer each question. These questions are provided to support your reflection process. Your log entry can be submitted in paragraphs or bullet points. There is no set expectation about the length of your entry. Here are some questions that might help you consider your progress.

## End of Year Reflection Questions

- What did you learn and in what ways did you experience growth through this process?
- What changes did you make to the goal throughout the process, if any? Please include reasons for the changes.
- What sort of obstacles and challenges did you encounter, and how did you navigate these?
- Please discuss concrete ways in which your goal impacted student learning/growth (attach evidence and data, if possible, or give anecdotes)
- If you were to start over, what adjustments would you make when designing your goals? Consider: “stretchiness,” viability, scope, etc.
- In what ways did the Folio process and coaching conversations help you to achieve your goals?
- At this point, would you consider your goal fully accomplished, or are you considering next steps? If there are further steps, what are they?
- Optional: Do you have initial thoughts about what next year’s goal might be?

After submitting your reflection, you’ll meet with your Department Chair/Growth Coach for one final check-in.



# Connect

[Register for upcoming events](#)

[Subscribe to our monthly newsletter to receive news about the Collaborative, professional development resources, tips for using myFolio, and upcoming events.](#)

Follow us on LinkedIn:  
[Folio Collaborative](#)

# Contact Us

## School Success Team

**Melissa Fast**

Head of School Success

[mfast@foliocollaborative.org](mailto:mfast@foliocollaborative.org)

**Amanda Nielsen**

School Success Manager

[anielsen@foliocollaborative.org](mailto:anielsen@foliocollaborative.org)

