

FREE PRINTABLE PACK · 14 PAGES

The Teacher Assessment Toolkit

Everything you need to run a fair teacher performance appraisal in a South African preschool or ECD centre. Print it, use it this term, change the wording to suit your school.

earlytrack.co.za

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- ✓ Six area teacher scorecard
- ✓ Self assessment sheet
- ✓ Peer assessment sheet
- ✓ Four point rating scale card
- ✓ Term 1 standard setting agenda
- ✓ Feedback meeting script
- ✓ Term 3 check in sheet
- ✓ One page improvement plan
- ✓ Signature and filing page
- ✓ POPIA staff records checklist

How to use this toolkit

You do not need all fourteen pages at once. Print the scorecard and the self assessment sheet first. Add the rest as you go.

1 Hand out the scorecard before you score anything

Give every teacher pages 4 to 6 at the start of the year. A teacher cannot be marked down for a standard nobody told her about. This one step removes most arguments before they start.

2 Let her score herself first

She fills in page 7 before she sees your scores. You fill in pages 4 to 6 without seeing hers. Neither of you looks until both are done. This is what makes the meeting a conversation instead of a verdict.

3 Add one peer score if you can

Page 8 goes to one colleague who works alongside her. Keep it to one peer, and be clear it is about growth, not about ranking staff against each other.

4 Meet, agree goals, and both sign

Use the script on page 11. Agree two or three goals. Sign page 14 together and put it in the staff file. A signature is not proof she agreed. It is proof the conversation happened.

5 Only reach for the improvement plan if you need it

Page 13 is for a score of 1. It is not a warning and it is not the start of a dismissal. It is a plan, and most teachers turn things around once they have one.

The four things that make an appraisal fair. She knew the standard in advance. The scores rest on real evidence, not a feeling. She got to answer before anything was final. It ended in a signed, dated record. Everything in this pack is built around those four points.

A four term cycle you can keep up with

Two full appraisals a year suits most small schools. Fewer than that and the record is too thin to act on. More than that and it quietly gets abandoned by term three.

1 Term 1 Set the standard Hand out the scorecard. Walk through it in a staff meeting. Nobody is scored yet. Everyone knows what the year is measured on.	2 Term 2 First full appraisal School score, self score, peer score. Feedback meeting. Two or three goals agreed and written down. Both sign.	3 Term 3 Quick check in Fifteen minutes each. No scoring. How are the goals going, and what do you need from me?	4 Term 4 Second full appraisal Score again on the same sheet. Compare to term 2. Talk about direction, not just the number. Sign and file.
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WHEN	WHAT YOU PRINT	ROUGHLY HOW LONG
Term 1	Pages 4 to 6 for every teacher, plus the agenda on page 10	One staff meeting
Term 2	Pages 4 to 9 per teacher, plus the script on page 11 and the signature page	30 minutes per teacher
Term 3	Page 12 per teacher	15 minutes per teacher
Term 4	Pages 4 to 9 again, plus pages 11 and 14	30 minutes per teacher
As needed	Page 13, only where a score of 1 was given	20 minutes to write

The term 3 check in is the part schools skip

It is also the part that makes the term 4 appraisal painless. A teacher who heard about a problem in August is never blindsided in November. Fifteen minutes in term 3 saves an hour of difficult conversation later.

Teacher scorecard: areas 1 and 2

Teacher	_____	Class	_____
Completed by	_____	Date	_____
Term	_____	Year	_____

1 Classroom practice and daily programme

1

Planning, flow of the day, activities that suit the age group

STATEMENT	1	2	3	4
Plans the week ahead and has materials ready before the children arrive	☐	☐	☐	☐
The day moves smoothly from one activity to the next without long gaps	☐	☐	☐	☐
Activities suit the age and stage of the children in her class	☐	☐	☐	☐
Theme work is used in real activities, not only as decoration on the wall	☐	☐	☐	☐
Manages behaviour calmly and consistently	☐	☐	☐	☐
Evidence you observed				

2 Child safety and supervision

2

Weight this area highest. Nothing here is negotiable.

STATEMENT	1	2	3	4
Does head counts at every change of place or activity	☐	☐	☐	☐
Keeps eyes on the whole class, including outside and at the bathroom	☐	☐	☐	☐
Follows the sign out rules and never releases a child to an unlisted adult	☐	☐	☐	☐
Reports every injury the same day and completes the record properly	☐	☐	☐	☐
Knows the emergency and evacuation procedure without being reminded	☐	☐	☐	☐
Evidence you observed				

Teacher scorecard: areas 3 and 4

Observation and assessment records

3

ELDA observations, milestone notes, report writing

STATEMENT	1	2	3	4
Observation notes are written up each week, not in a rush before reports	☐	☐	☐	☐
Comments describe the individual child rather than repeating set phrases	☐	☐	☐	☐
Covers every child in the class, not only the ones who stand out	☐	☐	☐	☐
Raises a developmental concern early instead of leaving it for the report	☐	☐	☐	☐
Reports go out on time and need few corrections	☐	☐	☐	☐
Evidence you observed				

Parent communication

4

Day to day contact, difficult conversations, follow through

STATEMENT	1	2	3	4
Answers parents the same day, or says when she will come back to them	☐	☐	☐	☐
Raises a concern with a parent early rather than at the parent meeting	☐	☐	☐	☐
Stays calm and professional with an upset or difficult parent	☐	☐	☐	☐
Tells the principal about a problem before it reaches the office	☐	☐	☐	☐
Shares the good news too, not only the problems	☐	☐	☐	☐
Evidence you observed				

Score against the whole year, not the last six weeks. Recency bias is the single biggest reason teachers feel an appraisal was unfair. If you only wrote things down in November, you will only remember November.

Teacher scorecard: areas 5 and 6

Teamwork and reliability

5

Timekeeping, leave, and what she is like to work beside

STATEMENT	1	2	3	4
Arrives on time and is ready before the first child is dropped off	☐	☐	☐	☐
Gives proper notice for leave and does not take days at short notice without reason	☐	☐	☐	☐
Helps a colleague who is struggling without being asked	☐	☐	☐	☐
Handles a disagreement with a colleague directly and calmly	☐	☐	☐	☐
Follows through on what she agreed to do at a staff meeting	☐	☐	☐	☐
Evidence you observed				

Professional growth

6

Last year's goals, training, and CPTD points for SACE registered staff

STATEMENT	1	2	3	4
Did what she agreed to do after her last appraisal	☐	☐	☐	☐
Attended training or a workshop this year	☐	☐	☐	☐
Takes feedback without becoming defensive	☐	☐	☐	☐
Asks for help when she is out of her depth	☐	☐	☐	☐
Keeps her CPTD points up to date, where SACE registration applies	☐	☐	☐	☐
Evidence you observed				

OVERALL

AREA TOTALS

Add your scores

Area 1 ____ Area 2 ____ Area 3 ____ Area 4 ____ Area 5 ____ Area 6 ____ Total out of 120: ____

Self assessment sheet

Fill this in before you see anyone else's scores. Be honest rather than modest. The gap between your score and the school's score is the most useful part of the whole conversation.

Your name	_____	Class	_____
Term	_____	Date	_____

SCORE YOURSELF ON EACH AREA	1	2	3	4
1. Classroom practice and daily programme	☐	☐	☐	☐
2. Child safety and supervision	☐	☐	☐	☐
3. Observation and assessment records	☐	☐	☐	☐
4. Parent communication	☐	☐	☐	☐
5. Teamwork and reliability	☐	☐	☐	☐
6. Professional growth	☐	☐	☐	☐

What went well this term?
 Something specific. A child you helped, a change you made, a parent you turned around.

What did you find hard?
 Saying this honestly is a strength, not a weakness.

What would help you do your job better?
 Training, time, equipment, a different class routine, more support at a certain time of day.

Peer assessment sheet

This is about helping a colleague grow. It is not about ranking staff against each other. Answer only where you have actually seen her work. Leave the rest blank.

Teacher	_____	Term	_____
Completed by	_____	Date	_____

STATEMENT	1	2	3	4	NOT SEEN
She is ready and prepared when the day starts	☐	☐	☐	☐	☐
She keeps her eyes on the children, including in shared spaces	☐	☐	☐	☐	☐
She helps out when someone else is under pressure	☐	☐	☐	☐	☐
She does her share of the shared jobs	☐	☐	☐	☐	☐
She handles disagreements directly and calmly	☐	☐	☐	☐	☐
She follows through on what she said she would do	☐	☐	☐	☐	☐

One thing she does really well

One thing that would make working with her easier

Say it the way you would want it said to you.

A note on privacy. A peer score is collected in confidence. Give the teacher the themes, not the sheet, and do not name the colleague who wrote it unless she has agreed to that in advance.

The four point scale

Four points, not five. A five point scale tempts everyone to score threes, which tells you nothing. Four points force the one decision the record actually needs: is this at standard, or is it not?

SCORE	WHAT IT MEANS	WHAT YOU DO ABOUT IT
4 • Strong	Consistently above what the school expects. Other teachers could learn from her here.	Say so out loud. Ask her to mentor someone.
3 • Solid	Meets the standard. This is a good score, not a mediocre one. Most scores should land here.	Confirm it and move on.
2 • Developing	Not yet at standard, but close, and getting better with support.	Agree one specific action for next term.
1 • Below standard	Falls short in a way that affects children, parents or the team.	Written improvement plan, page 13, with a review date.

The three biases that ruin scores

Read these before you start scoring. Naming them is usually enough to catch yourself doing them.

The halo effect

She is warm, the children adore her and the parents ask for her class, so she gets a 4 on everything. Including her paperwork, which is two months behind. Score each area on its own.

Central tendency

Scoring everyone in the middle to avoid a hard conversation. It feels kind. It protects you today and helps nobody, least of all her. This is exactly why this scale has no middle.

Recency bias

Scoring the last six weeks instead of the whole year. This is the biggest single reason teachers feel appraisals are unfair. The cure is not willpower. It is writing things down as they happen.

A simple test before you finalise a score

Can you point to something specific that happened, and roughly when? If you cannot, it is a feeling, not a score. Either find the evidence or move the score.

Standard setting agenda

Run this once, near the start of the year, with all teaching staff together. It takes about forty minutes and it is the reason nobody argues in term 4.

TIME	WHAT YOU COVER
5 min	Why we do this. Say plainly that appraisal is about growth and fairness, not about catching anyone out. Say that everyone will score themselves too.
10 min	Hand out the scorecard. Every teacher gets pages 4 to 6. Read the six area names out loud. Nobody is being scored today.
10 min	Walk through the statements. Go area by area. Ask if any statement is unclear or unfair. Change the wording if the room makes a good case.
5 min	Explain the scale. Show page 9. Make it very clear that a 3 is a good score and most people will get threes.
5 min	Explain blind scoring. Nobody sees anyone else's score until all are in. Explain why: so the self score is honest.
5 min	Dates. Give the term 2 appraisal week, the term 3 check in week, and the term 4 appraisal week. Put them on the staff calendar now.

Changes the staff asked for

Write down any statement you agreed to reword. A scorecard the teachers helped write is one they will not argue with.

Meeting date

Staff present

Term 2 week

Term 3 week

Term 4 week

Led by

Feedback conversation script

About thirty minutes. Follow the same shape every time and let her talk first. Borrow these words or change them to sound like you.

OPEN · 1 MINUTE

"Thanks for making time. This is not a test. I want us to end up with two or three things you will focus on next term. You go first."

HER SELF SCORE · 5 MINUTES

"Take me through how you scored yourself. Where do you think you are strongest? Where do you know you are not where you want to be?"

Do not interrupt. Write down what she says.

YOUR SCORES · 5 MINUTES

"Here is how the school scored you. We agree on most of it. Let me show you the two where we do not, and why I landed where I did."

Lead with where you agree. It makes the rest land better.

THE GAP · 10 MINUTES

"You gave yourself a 4 on records and I gave you a 2. Help me understand your side, because I may be looking at the wrong thing."

This is the most useful part of the meeting. Do not rush it.

AGREE THE GOALS · 5 MINUTES

"So for next term: observations written up every Friday before you leave, and you will sit in on the morning ring next door twice. Anything you need from me?"

Two or three goals. Never more. Write them down where she can see you writing.

CLOSE · 2 MINUTES

"If you disagree with anything here, say so now and I will write it on the form next to my score. Then we both sign."

Three rules that make this work

Let her speak first. Never deliver a score she has not had a chance to explain. Write her disagreement down rather than talking her out of it. A record that contains a teacher's objection is more credible than one that does not, not less.

Check in sheet

No scoring. No forms to file. Just a short conversation so nothing in term 4 comes as a surprise.

Teacher _____

Date _____

The goals we agreed in term 2

Copy them across from the appraisal.

GOAL	ON TRACK	SLIPPING	NOT STARTED
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

What do you need from me?

Ask this out loud and then be quiet until she answers.

Anything I should know that I do not know?

Agreed before term 4

One thing she will do. One thing you will do.

If something is slipping, say so now. A teacher who hears about a problem in August has time to fix it. One who hears about it for the first time in November has a grievance instead.

Performance improvement plan

This is a plan, not a warning and not the start of a dismissal. Most teachers turn things around once they have one. Keep it to this single page.

Teacher

Date agreed

Completed by

Review date

1. The specific problem

"Observation records for the 4 to 5 group were last updated in April" beats "poor record keeping". A vague problem cannot be fixed or proved.

2. The standard she must reach

What "fixed" looks like, in a sentence she could read back to you. If you cannot write it, you cannot fairly measure it.

3. The support the school will give

Training, a mentor, lighter duties, thirty minutes of admin time a week. Guidance is expected, not just instruction.

4. Review date and what happens at it

Usually six to twelve weeks. Write the actual date, not "next term".

Teacher

Principal

Signature and date

Signature and date

5. Outcome at the review date

Complete this on the same page on the review date. This one line is what turns a plan into a record.

☐ Improved, standard now met ☐ Partly improved, plan extended to _____ ☐ Not improved

Not legal advice. Labour matters turn on their own facts. Before acting on a poor performance issue, speak to a labour law practitioner or your employer organisation.

Signature, filing and POPIA

A signature is not proof she agreed with the scores. It is proof the conversation happened.

Teacher	_____	Term	_____
Overall score	_____	Date	_____

Goals agreed for next term

Two or three. Never more.

Anything the teacher disagrees with

Write it in her words. Do not argue her out of it. This makes the record stronger, not weaker.

Teacher

Principal

Signature and date

Signature and date

POPIA staff records checklist

An appraisal is personal information about an identified person, so POPIA applies in full.

- ☐ Appraisal records are stored where only the principal and that teacher can reach them
- ☐ Scores are never shared in a staff WhatsApp group or a group chat
- ☐ Peer scores stay confidential and are not passed on as a named sheet
- ☐ A teacher can see her own record whenever she asks for it
- ☐ Errors in a record are corrected when she points them out
- ☐ There is a set period for keeping files of staff who have left, and it is followed

Tired of chasing paper by term three?

EarlyTrack runs school, self and peer scoring on one scorecard, keeps every score blind until it seals, collects real signatures, and files a PDF report straight into the staff file.

earlytrack.co.za/features/teacher-assessments

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