Instructor Observation and Planning Tool
Updated 3/26/19

For more information about the competencies referenced in this document, please review the Instructor Competencies tool on the Northern Lights website. This document only includes the competencies that can easily be observed while the trainer is instructing a group of adults.

Date of Observation	
Time of Observation	
Location:	
Length of Training:	
Topic of Instruction	
Instructor:	
Observer:	

Purpose of this Observation:
____ Used as self-assessment   ____ Used by an observer   ____ Used for instructional planning

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In the "Rating" column, please rate the instructor using the following ratings:
- 1 indicates the competency is not at all or minimally met
- 2 indicates the competency is partially met
- 3 indicates the competency is fully met
- N/A indicates the competency is not applicable for this observation

Set Up and Introduction		
Competency	*Rating*	*Notes*
a. Sets up the room to facilitate comfort, interaction, flow, and engagement in the planned activities		
b. Establishes a personally welcoming climate of safety, trust, and inclusiveness		
c. Learns about participants' experiences and interests in relationship to this topic		
d. Presents agenda with clear and achievable learning objectives based on knowledge and skills in the early childhood and/or afterschool fields		

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Methods of Instruction

Competency	Rating	Notes
e. Uses a variety of instructional methods and materials to address all learning styles and preferences[1]		
f. Engages learners in purposeful hands-on interactions[2]		
g. Implements a cycle of connected learning tasks to develop, generate, and deepen learning over time		
h. Uses smooth transitions to effectively and logically connect experiences		
i. Uses technology effectively to engage the learner		
j. Uses open-ended questions, active listening, relevant examples, and constructive dialogue		
k. Adjusts instructional design to the actual session and accommodates unforeseen circumstances		

Session Content

Competency	Rating	Notes
l. Connects content to participants' experiences, context, and interests using relevant materials		
m. Addresses the sponsor's goals and the defined learning objectives throughout the session		
n. Provides the learners with relevant resources and sources of support		
o. Aligns training content with Vermont Core Knowledge and Competencies[3] and other professional standards		
p. Introduces new information based on current, effective practices, research, and standards		
q. Checks for participants' learning and achievement of the learning objectives throughout the session[4] and encourages completion of a written evaluation of the session		

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[1] e.g. auditory, visual, kinesthetic styles and individual, small, and large group activities
[2] Strategies may include problem solving, modeling, experimentation, analysis, and/or application
[3] For early childhood and/or afterschool professionals, as appropriate to the audience
[4] Strategies may include observing participants discussing, demonstrating, modeling, and applying knowledge

The Instructor as a Professional		
Competency	*Rating*	*Notes*
r. Arrives promptly, begins on time, is engaged for the entire session, and ends on time		
s. Uses respectful and professional communication and behavior		
t. Is well-prepared and organized		
u. Uses and follows professional development documentation protocol		

Please highlight a few strengths and a few opportunities for learning and growth based on your observation of the instructor. For self-assessments, please reflect on a few of your strengths and a few areas you would like to engage in learning and growth.

We have reviewed and discussed the content of this observation

Observer Signature: _____ Date: _____

Instructor Signature: _____ Date: _____

Next Steps:
- Use the results of this observation to consider changes to your instructional design and practices (if applicable)
- Use the results of this observation to revise your Individual Professional Development Plan (IPDP)

The chart below aligns the competencies in this document with the location of the competency within the Instructor Knowledge and Competencies Document.

Knowledge Area	Competency	Reference(s)
Set Up and Introduction	a	III-B.9
Set Up and Introduction	b	III-B.5; IV-B.1
Set Up and Introduction	c	III-B.2
Set Up and Introduction	d	III-B.1; III-B.5; IV-A.2
Methods of Instruction	e	IV-A.6
Methods of Instruction	f	IV-A.4
Methods of Instruction	g	II-B.5; IV-A.1; IV-A.3
Methods of Instruction	h	IV-A.7
Methods of Instruction	i	IV-A.8
Methods of Instruction	j	III-B.6; III-B.7; IV-B.3; IV-B.5
Methods of Instruction	k	IV-A.1; IV-B.4
Session Content	l	II-A.1; II-C.1; III-B.4; III-B.7; IV-A.4
Session Content	m	I-A.7; III-A.1; III-B.1; IV-B.2
Session Content	n	II-B.1; II-C.2
Session Content	o	I-A.2; III-A.2; III-B.1
Session Content	p	I-B.1; II-C.2; II-A.3; IV-B.4
Session Content	q	III-B.8; IV-A.2; V-1; V-3
The Instructor as a Professional	r	I-A.5; III-B.10; IV-B.2
The Instructor as a Professional	s	I-A.6; I-B.2; I-B.3; I-B.4
The Instructor as a Professional	t	I-A.5; III-B.3
The Instructor as a Professional	u	II-B.2