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**POLICY & PROCEDURES**

**OTLA**  
**(OBSERVATION OF TRAINING,  
LEARNING AND ASSESSMENT)**

<b>REFERENCE</b>	PPOTV2026AB 26
<b>ISSUE DATE</b>	30.04.26
<b>REVIEW DATE</b>	30.04.27



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## 1. PURPOSE

The purpose of the OTLA process is to ensure, promote, and enhance the quality of the learning experience for all learners and to identify the professional development needs of all delivery staff.

This policy aims to:

- Ensure the OTLA process aligns with the Education Inspection Framework (EIF) and ESFA expectations for high-quality teaching, learning, and assessment.
- Ensure that all delivery sessions - in-person, remote, blended, and assessment-only - are subject to observation where appropriate.
- Provide formal, structured feedback to delivery staff, supporting continuous professional development (CPD), in line with Crosby Training's Staff Development & Review Policy.
- Protect the confidentiality of observations and observation records, in compliance with GDPR, and ensure secure storage of all documentation.
- Link OTLA outcomes to learner experience, quality improvement, and organisational accountability.
- Ensure OTLA is used as a developmental quality assurance process that supports improvement, consistency, and evidence-informed decision making.

## 2. RESPONSIBILITIES

**The Quality Manager** is responsible for the overall monitoring of OTLA, ensuring continuous improvement and adherence to the EIF.

**The Senior Management Team** is responsible for oversight, reviewing action plans, and ensuring appropriate follow-up on identified CPD needs.

**Internal Verifiers / Quality Assurance Managers** conduct formal observations in line with the IQA strategy and programme requirements.



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**Tutors** are expected to cooperate with observations, participate in action plans, and engage in CPD as agreed.

All staff involved in OTLA must ensure compliance with the Safeguarding & Welfare Policy if concerns arise during sessions.

Observers must be trained and, where possible, standardised so that judgments are consistent, fair, and reliable.

Where OTLA findings indicate a concern about performance, this must be managed through the appropriate support or performance process, and not conflated with the developmental observation process.

### **3. SCOPE**

This policy applies to:

- All delivery staff across all programmes, including in-person, remote, and blended delivery.
- All types of assessments and training sessions delivered by Crosby Training.
- Observations conducted as part of formal OTLA schedules or requested by management.

## **4. OTLA PROCEDURES**

### **4.1 Scheduling Observations**

An annual OTLA Schedule is produced at the start of each contract year.

The schedule is confirmed with the Centre Manager and Quality Team.

Tutors receive confirmation at least 7 days before observation, including a copy of:

- This OTLA Policy
- Relevant OTLA documentation
- Education Inspection Framework guidance



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The annual schedule should be risk-based where appropriate, so that observations support both quality improvement priorities and curriculum review.

## 4.2 Observation Process

Observers must familiarise themselves with:

- The session content and intended learning outcomes
- Evacuation procedures and health & safety requirements of the venue (including remote platforms)

Observers ensure the integrity of the observation process and do not provide guidance to learners during sessions.

Observers should record sufficient evidence to support their judgements, including references to learner engagement, inclusion, progression, and the effectiveness of teaching and assessment strategies.

## 4.3 Learner Experience

Observations focus on the quality of the learner experience, including:

- Engagement and participation
- Inclusive and accessible teaching practices
- Support for learners with SEND, EAL, or other additional needs

Structured learner feedback must be collected where possible and included in the observation record. Learner voice should be considered alongside observer evidence where available.

## 4.4 Feedback and Action Plans

Initial verbal feedback on strengths and areas for improvement is provided immediately after observation.

Full verbal and written feedback is delivered within 3 days of observation.



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Tutors can request a second observation if there is disagreement with the initial report, subject to Quality Manager review.

Where sessions are judged inadequate, the observer alerts the Quality Manager, and a tailored action plan is created.

Action plans are monitored by the Senior Management Team and linked to CPD records.

Feedback should identify clear strengths, development points, and the impact on learners, not simply describe what was seen.

## 4.5 Documentation

Observation records include:

- Completed observation form
- Summary sheet
- Action plan (where relevant)

All documentation is securely stored and confidential. Digital records comply with GDPR retention periods and secure access protocols.

OTLA records must be available for internal quality review, self-assessment, and continuous improvement purposes.

## 4.6 Observation of Remote / Online Sessions

Observers must ensure learners' privacy and consent when observing online sessions.

Recording of online sessions is only permitted with explicit consent and must be securely stored.

The same standards for learner engagement, inclusivity, and safeguarding apply as in-person observations.

Observers must confirm that the remote environment allows meaningful observation of teaching, learning, and assessment practice.



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## 4.7 Escalation and Safeguarding

Any safeguarding concerns identified during observations must be reported immediately to the Designated Safeguarding Lead and managed according to the Safeguarding & Welfare Policy.

- Serious performance issues impacting learner outcomes are escalated to the Senior Management Team.

## 5. MONITORING & REVIEW

The Senior Management Team monitors trends in OTLA findings and CPD uptake.

OTLA outcomes are included in the organisation's Self-Assessment Report (SAR) and Quality Improvement Plan (QIP).

Learner and staff feedback on the OTLA process is reviewed annually.

Policy and procedures are reviewed annually, or sooner if regulatory or Ofsted guidance changes.

OTLA findings should be analysed to identify recurring themes, curriculum strengths, common areas for development, and any training needs for staff or observers.

## 6. LINKS TO OTHER POLICIES

Staff Development & Review Policy - *ensures OTLA actions feed into CPD and informal six-monthly reviews.*

Safeguarding & Welfare Policy - *ensures alignment with safeguarding responsibilities.*

Equality, Diversity & Inclusion Policy - *ensures inclusive observation and learner support practices.*

Data Protection Policy - *ensures secure handling and retention of observation records.*