Transitions

Development Tools

**Evaluation Workbook 2**

**Current projects and outcomes**

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# The audit tool

The resources in the audit tool are designed to be used to help school transitions leaders to conduct an evidence-based review of current support for transitions activities as well as planning for future development. However, they will also be helpful and transferable beyond this context.

## Introduction

 This is the last of four workbooks designed support ongoing evaluation and development. This workbook focuses on evaluating current transitions projects and their outcomes. The aim of this workbook is to ‘drill down’ into the specific projects and activities that you use to support transitions and to understand whether they lead to successful outcomes (planned and/or unplanned), how they work, what support is needed and who is involved. If your transitions activities have been running for some time and you want to focus on working with staff to improve these activities, then this workbook is likely to be the most useful. The workbook contains sets of questions that can be used as prompts to help with the process of reviewing your provision. They have been grouped into what we think are helpful themes which will help to guide your focus and plan your audit processes. Please remember that the questions are not exhaustive.

## Evaluation workbook 2 - Current projects and outcomes

The aim of this workbook is to ‘drill down’ into the specific projects and activities that you use to support transitions and to understand whether they lead to successful outcomes (planned and/or unplanned), how they work, what support is needed and who is involved. **This workbook is designed to be used once for each project or activity that you run.** You may find it helpful to ask staff who run the specific projects and activities to help with completing this workbook.

*Evaluation workbook 2 action steps*

* **Step 1: project details.** This section will help you to draw together the information needed to create an evidence-based picture of your current projects.
* **Step 2: bringing it together.** This section is to help you to make judgements about the effectiveness of your transitions projects and areas for development. In this section you will be guided to set priorities and draw these priorities together in a way that identifies realistic opportunities for development.
* **Step 3: planning.** This will section help you to develop a set of actions that will guide the continuation and development of your current projects and that will support the growth of new provision.
* **Step 4: summary action plan.** In this section, you will pull out the key aspects of your planning that need to be communicated to a wider audience. This section provides the overview of the capacity needed for implementation, as well as monitoring (and potentially reporting) deadlines.

# Step 1: project details

In this step you will create an evidence-based picture of your current projects, their effectiveness, and any opportunities for improvement. The intention is to help you to think about areas for improvement that you may not have considered before.

Use the following Table (Table 1) to help you to create an evidence-based picture of your current project(s). The intention of each question is to highlight different possible areas for consideration. If it is not relevant you can leave it blank. If you think of other areas that are relevant, then add them to the bottom of the list. Please complete Table 1 as follows (one for each project). N.B. You may like to ask the project leader(s) to complete these details and you may also want to merge cells as relevant to each project and its development.

* ***Questions****: List relevant questions here. One per table row. Some are added for you.*
* ***This year****: Write your answer to the question for this year.*
* ***Last year****: Write your answer to the question for last year.*
* ***2 years ago****: Write your answer to the question for 2 years ago.*
* ***3 years ago:*** *Write your answer to the question for 3 years ago.*
* ***Note any changes over time****: Note significant differences across columns 2-5 that were planned.*
* ***Note any unplanned outcomes/changes****: Note significant differences across columns 2-5 that were unplanned.*
* ***Needs identified****: Write down any student transitions needs that arise from the situation this year (column 2) and changes over time (columns 3-5).*
* ***Evidence 1****: note down where you found the evidence to support your statement in columns 2-5*
* ***Evidence 2****: note down where you found the evidence to support your statement in columns 2-5*
* ***Evidence 3****: note down where you found the evidence to support your statement in columns 2-5*

## Table 1: example table of information about project activities

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Details** | **This year** | **Last year** | **2 years ago** | **3 years ago** | **Note any change over time** | **Note any unplanned outcomes/changes** | **Needs identified** | **Evidence 1** | **Evidence 2** | **Evidence 3** |
| What was the name of the project? | Transitions week | Transitions week | Transition visits | Transitions visits | Grew from 1 day – few schools at a time to a full week all schools.Focus on students with SEND last year.   | COVID prevented visits this year | Continue to provide additional support in weeks 1-3 Sept as this year alongside transitions week in July.  | Project planning document | Project evaluations (last 4 years) | N/A |
| Why was this project carried out? | To provide the opportunity for students to 1) understand expectations 2) make friends 3) practice new routines with extra support | More focus on these in weeks 1-3 of September.  | Project planning document | Project evaluations (last 4 years) | Transitions support planning grid. |
| Did it work? How well? | Limited success as few visits. Greater support in weeks 1-3 Sept worked well.  | Very well | OK but not enough time for all and not enough for pupils with SEND  | Students with SEND came first this year.  | Pupil feedback (survey) | Parent feedback (survey) | Staff feedback (meeting minutes) |
| Who for? | Great for pupils with SEND who did visit this year.  | Helpful for all |  | Pupil feedback (focus group) | Parent feedback (survey) | Staff feedback (meeting minutes) |
| How much did the project cost? | £2K | £6K | £4K | £4K | Increase in costs related to transport.  | Unplanned low cost this year as fewer visits.  | Budget for last 4 years | Meeting minutes | Yearly project evaluations |

**Table 1: example table of information about project activities (continued)**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Did it provide value for money/resource (consider staff, pupil, and parent time as well as budget)? | For those involved – very effective.  | Very effective for most. Some gaps in pupils with SENDs | OK but many forgot by Sept | OK but many forgot by Sept | Increased effectiveness and greater focus on specific needs and groups.  | Greater focus on pupils with SEND this year.  | Continue specialist support visits for SEND students **before** all arrive (like this year).  | Pupil feedback (focus group) | Parent feedback (survey) | Staff feedback (meeting minutes) |
| Is it sustainable? How? | Yes – with ongoing funding, coordination with link schools (dedicated week), and staff time/ commitment to engage.  | N/A |  | See above | See above | See above | See above |
| How might it be improved? | Greater coordination of transitions weeks (some schools still not coordinated/engaged) | More schools have been involved over time.  | N/A | Engagement from school X and Z | Project planning document | Project evaluations (last 4 years) | Parent feedback (survey |

## Key transitions questions about specific activities for Table 1

The questions in the table below seek to support your thinking as you complete Table 1. It is not an exhaustive list. Neither do they all need to be answered. You may wish to go through each question in turn, pick out some key questions, add your own or group them differently. Remember that the intention is to help you to understand your school context and to think about areas of need and development that you may or may not have considered before. It is a good idea to speak with colleagues as you develop your answers.

## Table 1: information about project activities

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Details** | **This year** | **Last year** | **2 years ago** | **3 years ago** | **Note any change over time** | **Note any unplanned outcomes/changes** | **Needs identified** | **Evidence 1** | **Evidence 2** | **Evidence 3** |
| What was the name of the project? |  |  |  |  |  |  |  |  |  |  |
| Why was this project carried out? |  |  |  |  |  |  |  |  |  |  |
| Did it work? How well? |  |  |  |  |  |  |  |  |  |  |
| Who for? |  |  |  |  |  |  |  |  |  |  |
| How much did the project cost? |  |  |  |  |  |  |  |  |  |  |
| Did it provide value for money/resource (consider staff, pupil, and parent time as well as budget)? |  |  |  |  |  |  |  |  |  |  |
| Is it sustainable? How? |  |  |  |  |  |  |  |  |  |  |
| How might it be improved? |  |  |  |  |  |  |  |  |  |  |
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\*\*Add extra table rows as needed.

## Note on the key questions

 As you complete the table, you may like to consider the following:

Why was this project carried out (what was the intention)? *(use all that apply):*

* To improve student resilience
* To improve student behaviour
* To improve academic outcomes
* To improve engagement (from whom?)
* To provide psychosocial support
* To provide peer support
* To provide support before summer transfer
* To provide support after summer transfer
* To provide support with settling into a friendship group
* To foster confidence that students know what to do
* To foster confidence that students feel safe
* To foster peer acceptance
* To foster high expectations (of whom?)
* To foster positive classroom relationships
* To foster a sense of belonging in a school
* To foster feelings of self-determination
* To support reflection (for whom?)
* To support a specific group/specific groups of students?
* To make achievements more visible
* To address specific concerns (what concerns? Whose?)
* To improve inter-school communication/collaboration
* To improve school-agency communication/collaboration
* To improve School-pupil communication/collaboration
* To improve School-parent communication/collaboration
* To improve school use of information
* To support staff (to do what?)
* To support effective leadership
* To train staff (to do what?)
* To support the development of inclusive values or systems (in whom)
* To promote consistency
* To promote expertise sharing

# Step 2: bringing it together

This step is to help you to make judgements about provision for the needs identified in the table above. It will also help you to set priorities and draw these together in a way that identifies realistic opportunities for development.

## Analysis of needs

1. Table 2 (below) is designed to help you to make judgements about provision for the needs identified above.
2. Transfer details from the green needs column from your Table 1 above into the first (green) column of the table below.
3. Then complete the table as follows:
* ***Areas where needs have been Identified****:* *This will be the details from the green ‘Needs identified’ columns in the table above.*
* **Level of need:** Make an initial judgment about the severity of the need (the degree to which specific intervention is essential to support effective educational progress). Draw on your evidence from above. Answer = High/medium/low
* ***Number of pupils involved:*** *In each row, you may use RAW numbers or choose to categorize as follows: Over 90%, Between 75% and 90%, Between 50% and 74, Between 25% and 49%, Between 10% and 25%, Less than 10%,*
* ***Strength of evidence:*** *Make a judgement on the strength of your evidence - do you think your evidence is Strong, Moderate or Weak*
1. Now use the blue columns as follows:

**High need column: c**heck this box if the ‘Level of need’ column (column 2) is **HIGH** and you have *either* three pieces of evidence or *at least* two pieces of evidence that are **moderate** or **strong**.

**High impact column: c**heck this box if the ‘Number of pupils involved’ column (column 3) involves the **highest numbers of pupils** (compared to other areas of need)and you have *either* three pieces of evidence or *at least* two pieces of evidence that are Moderate or strong.

**School priority column:** check this box if after steps A and B above the row is not checked and you feel that this should still be a priority. If you check this box, you should provide a clear rationale for inclusion of this area in Table 4. For example, this area may be a school priority but be low need, involve low numbers or have a low evidence score.

## Table 2: context and needs analysis

\*Examples are given in rows 1 – 4

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Areas where needs have been Identified** | **Level of need** | **Number of pupils involved** | **Strength of evidence 1** | **Strength of evidence 2** | **Strength of evidence 2** | **How many forms of evidence?** | **Is this high need** | **Is this high impact** | **Is this a school priority?** |
| Continue to provide additional support in weeks 1-3 Sept as this year alongside transitions week in July.  | Moderate | 100% | Strong | Strong | Moderate | 3 | [ ]  | [x]  | [ ]  |
| Continue specialist support visits for SEND students **before** all arrive (like this year). | High | 36% | Strong | Strong | Moderate | 3 | [x]  | [ ]  | [ ]  |
| Engagement from school X and Z | High | 20% | Strong | Strong | Moderate | 3 | [x]  | [ ]  | [ ]  |
| *\*\*\*We would like to get a more diverse range of parents involved in transitions activities* | High | 70% | N/A | N/A | N/A | N/A | [ ]  | [ ]  | [x]  |
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\*\*Add extra table rows as needed.

\*\*\* See School Priority note above for instructions that relate to this example row

## Table 3: rationale for making a school priority

\*An example is given in row 1

|  |  |  |
| --- | --- | --- |
| **Number** | **Details** | **Rationale** |
| *\*Example* | *We would like to get a more diverse range of parents involved in transitions activities* | We tend to see the same parents at events, and we think that some parents and pupils are missing out. Widening parent engagement is a school priority on the school development plan.  |
| **1** |  |  |
| **2** |  |  |
| **3** |  |  |
| **4** |  |  |

\*\*Add extra table rows as needed.

## Analysis for development

In Table 2 (above) you now have a Table of evidence-based needs and priorities. At this stage you will decide what you ARE able to change within your current capacity, and what you are NOT able to change in this development cycle. Draw on your evidence from above to help inform your decisions.

1. Transfer the first (green) column of Table 2 columns into the first (green) column in Table 4.
2. Transfer the blue columns from Table 2 into the blue columns 2, 3, and 4 in Table 4.
3. Consider the risk and opportunity for each, and check each (yellow) column as follows
4. **Current provision (potential risk):** check this box if this need is met by current provision.
5. **Current provision (opportunity for growth): c**heck this box if this need can be is met using current provision.
6. **New provision (potential risk):** check this box if this need cannot be met by current provision and capacity will not allow for new provision.
7. **New provision (opportunity for growth): c**heck this box if this need cannot be met using current provision and you have capacity and resources to support new activities.

## Table 4: transition provision risk and opportunity matrix

\*Examples are given in rows 1-2

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Areas where needs have been Identified** | **Is this high need** | **Is this high impact** | **Is this a school priority?** | **Current provision (potential risk)** | **Current provision (opportunity for growth)** | **New provision (potential risk)** | **New provision (opportunity for growth)** |
| Continue to provide additional support in weeks 1-3 Sept as this year alongside transitions week in July.  | [ ]  | [x]  | [ ]  | [ ]  | [ ]  | [ ]  | [x]  |
| Continue specialist support visits for SEND students **before** all arrive (like this year). | [x]  | [ ]  | [ ]  | [ ]  | [x]  | [ ]  | [ ]  |
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\*\*Add extra table rows as needed.

# Step 3: planning

  This step will help you to develop a set of actions that will guide the continuation and development of existing provision and that will support the growth of new provision. You may want to include several actions for each area. Try to be specific about your next steps. Keep going until you feel you have reached capacity. If there are areas still left to add at that point, you may need to go back to the previous exercise and move some into the New Provision/Risk category. Complete Table 5 as follows:

* **Area of need:** Transfer this from provision/risk/opportunity matrix green column 1
* **Action steps:** What task will be done?
* **Who will be responsible:** Who will do it?
* **Deadline for completion or review:** By when?
* **Resources needed:** What do you need to complete this step? (People, money, tools, etc.)
* **Potential barriers:** What could get in the way of task completion? How will you overcome them?
* **Result:** What will be the outcome of the task? How will you know it is done?

There are two additional columns that you will not complete at this stage. These will be revisited after the action steps have been taken and you have gathered evidence to evaluate their success:

* **Was the result achieved?** Complete after date in column 4 Yes/No
* **Unplanned effects:** Complete after date in column 4. Give details.

## Table 5: planning to address new and developing areas of need

\*Examples are given in rows 1-2

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Areas where needs have been Identified** | **Action steps** | **Who will be responsible** | **Deadline for completion or review** | **Resources needed** | **Potential barriers** | **Result** | **Was the result achieved?**  | **Unplanned effects** |
| Continue to provide additional support in weeks 1-3 Sept as this year alongside transitions week in July.  | Schedule form activities and compile worksheets in workbook. Communicate in staff briefing (July/Sept). Gather feedback from staff in July to prepare based on transitions week | Ms Adams, Ms Ball | April 2050 | Form time, briefing time, Budget for copying, planning time.  | Staff engagement, time to complete, absence (organise catch up group in library).  | Activities take place and perceived impact on student behaviour beyond weeks 1-3.  |  |   |
| Continue specialist support visits for SEND students **before** all arrive (like this year). | Coordinate with link schools and SEND coordinator when pupils will visit (aim 2 weeks before transitions week) | Ms Adams, Ms Ball | Sept 2050 | Staff time & travel.  | Staff/ pupil absence. Transport.  | Visits in place and 90% attendance.  |  |  |
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\*\*Add extra table rows as needed.

# Step 4: summary action plan

In this section, you will pull out the key aspects of your planning that need to be communicated to a wider audience. This section provides the overview of the capacity needed for implementation, as well as monitoring (and potentially reporting) deadlines. The aim of this section is to present an overview of development actions in relation to areas of need to support school transfer and transition in your school community. This table should be shared with the wider school leadership team to help with monitoring, support, resource allocation and appraisal.

To construct your summary report and action plan, gather together the action plans from the reviewing section of Table 5 (red columns) and put them onto Table 6 below. You will need the information from the ‘Area of need’, ‘Who will be responsible’, ‘Resources needed’, and Deadline for completion or review’ columns. This will give you a good overview of the capacity needed for implementation, as well as monitoring (and potentially reporting) deadlines.

### Table 6: summary of context and needs actions

\*An example is given in row 1

|  |  |  |  |
| --- | --- | --- | --- |
| **Areas where needs have been Identified** | **Who will be responsible** | **Deadline for completion or review** | **Resources needed** |
| Continue to provide additional support in weeks 1-3 Sept as this year alongside transitions week in July.  | Ms Adams, Ms Ball | April 2050 | Form time, briefing time, Budget for copying, planning time.  |
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\*\*Add extra table rows as needed.

# Notes pages

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