

Evaluation Planning For 20/21

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AIM

The aim of this project was to create an evidence-based framework to link the activities offered by Shaping Futures to the aims of the Uni Connect programme. This would act as an update to the progression framework approved at the start of Phase 2, and would ensure that all staff had a clear understanding of how activities delivered link to each other. This project then could lead into streamlining activity into only what is most effective and beneficial to the learners.

BACKGROUND

Shaping Futures began in 2017 to provide outreach across the Liverpool City Region as part of the Uni Connect programme, then the National Collaborative Outreach Programme (NCOP), funded by the Office for Students (OfS). One of the aims of the Uni Connect programme is to contribute evidence of “what works” in the sector, through evaluation of interventions.

In August 2019, the start of the second phase of the programme, the OfS required the completion of an evaluation plan and progression framework. These documents aimed to provide high level overview of Shaping Futures’ provision during the phase, August 2019 to July 2021. Over the course of 2019/20, there were significant changes to staff and delivery through regular turnover and the onset of the COVID-19 pandemic and subsequent school closures. A review of the programme aims and activities was required in order to ensure that Shaping Futures remained effective, and that all staff understood how activities linked to the overall aims of the programme. This project is based on the Theory of Change methodology, which works by identifying the long term aims for a project then working backwards to identify how the activities delivered impact these aims¹. The idea is that the Theory of Change allows for better planning, due to an understanding of why activities are taking place, and more efficient evaluation, as it is possible to measure progress towards the project’s aims.

Theories of Change are widely used in the public and health sectors, and are starting to be more common in the education sector. The OfS suggest using Theories of Change when creating programmes in “Using standards of evidence to evaluation impact of outreach.” TASO (Transforming Access and Student Outcomes in Higher Education), another OfS funded project, also provide information on Theories of Change, particularly in an outreach setting.

METHODOLOGY

This project took place entirely digitally, due to the lockdown in 2020. It involved all core team members from Shaping Futures who work directly with learners, consisting of 8 Higher Education Progression Advisers (HEPAs) and 4 Project Assistants (PAs). This group was split into 3 teams, one for each key stage that Shaping Futures work with. Each team was given a series of tasks, spread out over several weeks, from the beginning of April 2020 to mid-May 2020.

TASK 1

For the first task the teams were asked to identify what learners need to achieve in each key stage in order to progress to Higher Education. They also needed to consider the barriers that learners may face within the key stage, and highlight which specific underrepresented groups may be most affected by these barriers. The teams were asked to provide evidence of why these were important, preferably using published research.

TASK 2

Once the aims for each key stage had been identified these were analysed and three overarching themes appeared. The specific aims that each team had come up with were grouped under these three themes. To complete the second task, the teams needed to outline what preconditions, or sub-aims, were required of the learners to achieve these aims. In line with the Kirkpatrick methodology, teams were asked to think about specific behaviours, attitudes and learning objectives that were required in order to achieve each aim.

TASK 3

Teams were asked to consider which activity would best achieve each outcome identified in task 2, and provide evidence for this either from published literature or previous Shaping Futures evaluations. Due to the large number of outcomes for each team, it was hoped that there would be overlap in best practice to allow staff to use each other's research and not duplicate work. During this time, TASO released their Evidence toolkit, which summarises the evidence on widening participation activities, so teams were able to use this in their research.

REVIEW

Once all information was returned, an in-depth review of the aims and preconditions took place. This led to removal of duplication between the key stages and tighter definitions of medium-term outcomes and short or immediate term outputs. In some cases, outcomes were re-categorised from their original theme in order to fit within the new framework. This work has been turned into a toolkit, with outputs and outcomes clearly defined by theme, and linked to the progression framework and Gatsby Benchmarks to ensure that there are no gaps. The toolkit also links to the questions used in surveys to measure impact, and provides space to outline which activities link to the outputs.

RESULTS

TOOLKIT STRUCTURE

The toolkit follows a similar structure to the tasks, with outputs (short/immediate term objectives) grouped under outcomes (medium term objectives), which are grouped under the three themes identified as the overall aims for Shaping Futures.

Activities are associated with each output. Figure 1 shows how the outputs, outcomes and aims are linked. The toolkit is stored in an Excel spreadsheet, to allow for flexible filtering when using it to design and evaluate activities. This allows for practitioners to quickly identify which outputs their activity should achieve and evaluate it accordingly. Figure 2 shows a screen shot of part of the toolkit. This section of the report details what is included in each field of the toolkit.

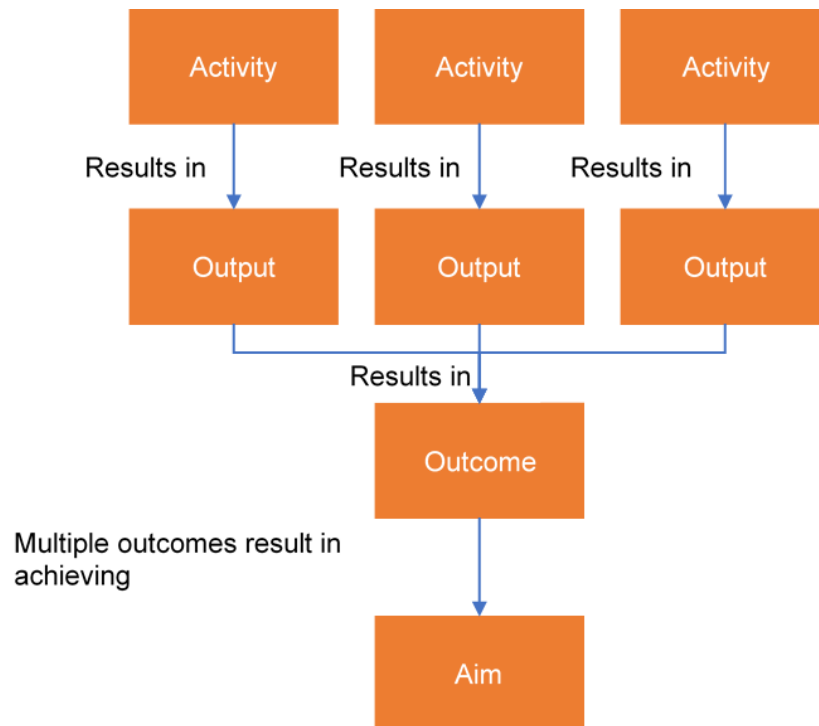


Figure 1: Structure of the Toolkit

Theme	Level	Output Group	Output	Outcome
Know what HE is	Developmental	Applying to HE	Learners understand different entry requirements for FE and HE study, and how to determine these e.g. grades, subjects, entry exams, work experience, interviews	Increase in number of target ward learners applying to HE
Know what HE is	Consolidation	Applying to HE	Learners understand how the UCAS process works e.g. elements of the form, timeline	Increase in number of target ward learners applying to HE
Know what HE is	Consolidation	Applying to HE	Learners understand how to complete a UCAS form	Increase in number of target ward learners applying to HE
Know what HE is	Consolidation	Applying to HE	Learners understand the personal statement, what is required and what actions may be needed	Increase in number of target ward learners applying to HE
Know what HE is	Consolidation	Applying to HE	Learners understand if their course choices will require additional admissions elements and how to prepare for these	Increase in number of target ward learners applying to HE
Know what HE is	Consolidation	Applying to HE	Learners understand the role of applicant days and the difference between these and Open Days	Increase in number of target ward learners applying to HE
Know what HE is	Consolidation	Applying to HE	Learners understand Clearing and Adjustment, and what to do if they need to use them.	Increase in number of target ward learners transitioning into and succeeding at HE

Figure 2: Snapshot of a section of the Toolkit

AIMS

Three key themes were identified in the aims for all key stages. These were:

- **Know what Higher Education is**
- **Make informed choices**
- **Have the skills to succeed**

KNOW WHAT HIGHER EDUCATION IS

This theme identifies issues in learners' understanding of what university is, and what it can offer them. It covers topics such as: the understanding of life at university, including the academic expectations and opportunities; what support is available when studying at Higher Education level, including student finance; and having an in-depth understanding of the careers and therefore financial benefits a Higher Education qualification may offer. A great deal of this theme was based on the delivery staff's experiences with learners, however research also backs up the need to provide in-depth information on Higher Education for learners from underrepresented backgrounds².

MAKE INFORMED CHOICES

There are three major educational decisions learners make through their time in the target key stages: choosing their GCSE subject options; choosing what study or work to do after year 11; and choosing what to do at 18, including whether to undertake higher education. Empowering learners to make informed decisions about their future is key to the Uni Connect programme. As an impartial service, it is important to advise learners on all their options. This theme's focus is on knowing where to access information on options, understanding what different school subjects may lead to, and understanding post-16 options.

HAVE SKILLS TO SUCCEED

The final theme aims to provide learners with the skills they need to succeed in education and the workplace. This theme includes attainment, citizenship and transferable skills. The team highlighted that focusing on skills will allow the learners to understand the relevance of what they are learning in school, and will mean that they are more engaged. Attainment, although not one of the aims of Uni Connect, is included in this theme as low attainment is the biggest factor in preventing Higher Education access³ and is a particular concern in light of school closures⁴

OUTCOMES

Outcomes are medium term objectives of the programme. The outcomes align to the three themes identified above. Some of the outcomes identified can be measured using HEAT tracking data, but the majority are attitude or behaviour changes and need to be measured through surveys or observation. The below table details the outcomes by theme:

Theme	Outcome
Know what Higher Education is	Increase in number of target ward learners applying to Higher Education
	Increase in number of target ward learners transitioning into and succeeding at Higher Education
	Increase in target ward learners understanding what Higher Education is, and reduction of misinformation about Higher Education
Make informed decisions	Learners are empowered to play a part in the decisions they make about their future
	Learners have made informed Higher Education & Career choices by utilising current LMI
	Increase in number of target ward learners transitioning into and succeeding at KS5
	Learners can see the value in school and college subjects in terms of preparing them for the future
Skills to succeed	Increase in GCSE and KS5 attainment for learners from deprived wards
	Learners understand and develop the essential skills for their next stage, whether Higher Education, apprenticeship or workplace

OUTPUTS

Outputs are short or immediate effects that will happen as a result of the activity, and in this project, are synonymous with the learning objectives for activities. They are grouped based on topic, which enables easier selection of outputs when designing activities. Some of the groupings align exactly with an outcome, however some outcomes have multiple groups under them.

Theme	Output grouping	Explanation
Informed Choices	Decision making	These outputs refer to helping learners gain decision making skills, especially regarding their subject and career choices.
	IAG	These outcomes are about where and how to access support in career planning.
	LMI	These outcomes are about labour market information and how this may impact learners in the future.
	Post-16 pathways	These outcomes are about the different routes available to study at 16, including alternatives to A-levels.
	Subject links	These outcomes link subjects studied in school to Higher Education and future careers.
Know what Higher Education is	Applying to Higher Education	These outcomes are linked to the actual process of applying to Higher Education, including UCAS and personal statements.
	Careers post-Higher Education	These outcomes are about understanding the career options and longer-term benefits of Higher Education.
	Higher Education learning	These outcomes refer to the different learning styles in Higher Education and how they compare with school.
	Higher Education Pathways	These outcomes are about the different routes available to study at Higher Education level, including apprenticeships and part time study.
	Life at university	These outcomes refer to the experiences that are available whilst studying, external to academic learning.
	Student Finance	These outcomes are regarding what student finance is, how to access it, and how it is paid back.
	Transition	These outcomes are specific to making the transition from KS5 to Higher Education.
Skills to Succeed	Attainment	These outcomes are about supporting learners' attainment in their KS4 and KS5 assessments.
	Citizenship	These outcomes are about increasing learners' knowledge of the world and being a good citizen.
	Confidence and Resilience	These outcomes are about increasing learners' understanding of mental health and how to cope with barriers they face.
	Transferable skills	These outcomes are about understanding what transferable skills are and how to develop them.

LEVEL

Through grouping the outputs across the key stages, it came to light that the teams had identified the same or similar outputs for the different age groups. For this reason, it was concluded that outputs should not be limited by learner's age, but rather the level of knowledge or experience they have. The outputs have been categorised into levels of complexity: introductory, developmental and consolidation. These roughly align with the key stages; however, sometimes learners in key stages 4 and 5 may need to cover the introductory concepts before moving on to the higher-level outputs

THE PROGRESSION FRAMEWORK

The outputs developed from this project are much more detailed and broader in scope than the learning outcomes outlined in the progression framework. This may go some way to explain the disconnect some staff felt to the progression framework. The below table highlights the disconnect between this project and the progression framework:

Theme	Number of outputs	Number of outputs associated with progression framework	%
Know what Higher Education is	43	26	60%
Make informed decisions	30	8	27%
Skills to succeed	27	2	7%
Total	100	36	36%

As a result of this, for the year 20/21, the core team are using the evaluation toolkit created during this project to plan activities, rather than the progression framework. Should Shaping Futures be extended into future years, a review of the progression framework would need to take place, to ensure that all activities are aligned to both the evaluation plan and progression framework.

OTHER BENCHMARKS

The toolkit links to statutory benchmarks and frameworks that schools are asked to follow. These are the Gatsby Benchmarks, the CDI careers framework and the PSHE programme of study. These links should enable HEPAs and partners to associate their activities with what the school needs to achieve much more easily.

The Gatsby benchmarks are referenced in the DfE's Careers strategy and the Statutory Guidance for careers⁵. Schools are required to cover the benchmarks for their learners. There is a benchmark explicitly linked to Higher Education, "Encounters with further and higher education," however, the toolkit has outputs that contribute to many of the other benchmarks.

The CDI careers framework is a voluntary framework that provides a framework of learning outcomes for careers learning in schools⁶. It covers 17 areas for learning in careers, employability and enterprise, and the toolkit covers 14 of these to varying extents. The most common learning outcome from the CDI framework covered in the toolkit is: "Identifying choices and opportunities," highlighting the importance of Shaping Futures' position to provide impartial advice.

⁵ <https://complete-careers.com/gatsby-benchmarks/> accessed 01/10/2020

⁶ <https://www.thecdi.net/write/CDI-Framework-Jan2020-web.pdf> accessed 01/10/2020

The PSHE Programme of study has three themes that young people should address through the key stages: health and wellbeing, relationships and living in the wider world. The majority of the toolkit is under the “living in the wider world”⁷ theme. However, a small amount of outputs link to the other themes, particularly those regarding to citizenship and resilience.

ACTIVITY DEVELOPMENT

Completing the activities section was difficult for the team. Undertaking this task highlighted the lack of published literature on well-evidenced interventions in widening participation, also highlighted by TASO’s work. It also showed the need to focus on the impact of activities going forward, as it was difficult to associate prior activities staff had run to the outputs they had identified. A subsequent audit of activities has revealed that many activities do align with the toolkit, but there is limited evaluation data of the impact of these activities. Many of the activities that the team identified are not known to be impactful based on quantitative data, but have anecdotally been well received by learners.

Once the structure of the toolkit was in place, the core team started to design activities based on these outputs. It was decided to structure activity planning along the three themes, as well as having a particular focus on Higher Education pathways, to ensure that the ‘traditional’ route was not promoted over other Higher Education routes. Thinking about activity development from aims first was a challenge for the team, and further support was needed to streamline the outputs for initial activity development.

It was emphasised that it is not expected that every learner will receive an intervention for each output through Shaping Futures activities, the aim is to plug gaps in knowledge and skills for learners from particular underrepresented groups, who are more at risk of not achieving these outcomes through other interventions. With this knowledge, the team focused on designing activities to cover a small number of outputs, rather than attempting to cover all the outputs per key stage. This increased the pace of activity design and enabled the team to re-purpose old resources to fit the new evaluation structure.

MEASURES

One of the aims of this project was to provide a common framework for evaluation across the team. To facilitate this, each output has been associated with impact measures, either survey based or options for more creative methods. Survey based measures were mainly created from the CfE national evaluation survey for the Uni Connect programme⁸, and from other validated survey tools used with young people. Where validated measures were not available, specific questions have been written for the outputs.

Activities with the same outputs will use the same survey measures, so it will be possible to compare learner responses between activities, and change activity design based on learner feedback. The more creative measures will give quantitative data that can be used to see the impact of Shaping Futures. As these creative measures can be adapted across delivery styles and activities they won't be directly comparable to each other, but can be used in case studies and as part of formative evaluation. Creative methods of evaluation can often be integrated into activity design and show impact in a way that surveys would not capture.

⁸ <https://www.officeforstudents.org.uk/publications/ncop-end-of-phase-one-evaluation-report/> accessed 01/10/2020

FEEDBACK AND NEXT STEPS

Feedback on the project so far has been positive. HEPAs now have a clearer understanding of how all their projects link together and the benefit they provide learners. An initial presentation to the partners at the Monitoring and Evaluation Group also resulted in positive feedback.

Going forward, the toolkit will be used by the core team throughout 2020/21 for activity design and evaluation. If partners feel it is useful, they will also be supported to use the toolkit through 2020/21. This means that by the end of phase 2, in July 2021, there should be evidence of impact of a variety of activities and delivery methods across outputs and outcomes that are thought to increase access to Higher Education.

Should Shaping Futures and the Uni Connect programme get extended into a third phase, a review of the toolkit and linked progression framework would take place, and all stakeholders would be engaged to consider what changes should be made, including partners, schools, learners, and other Higher Education access programmes.





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**For more information visit our
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<https://shaping-futures.org.uk/>