

## Compass+ Bitesize - Activities Reporting transcript

0:01

Good afternoon everyone.

0:02

We'll make a start there now.

0:04

We were just waiting for a couple of the registered participants to join the webinar this afternoon.

0:11

So just before we do get started, just to point out that the webinar is being recorded today.

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So for anybody that hasn't been able to make it, if you are aware of any of your colleagues, it's registered but haven't been able to make it for whatever reason that today's session is being recorded.

0:25

So everybody will still get a copy of the webinar and slight decks in the post session comms.

0:31

So welcome to our first compass+ bitesize webinar on activities reporting.

0:37

So this is the first iteration of the new activities reporting function.

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And just before we do get started, it was just really to put a shout out that if we would welcome your feedback from today's session.

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So really making sure that we are demonstrating this version of the product to the best that we can.

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And then it meets the needs for yourselves.

1:01

So just introduce myself.

1:02

My name is Peter McKinney.

1:03

I am a Compass+ trainer and I lead on our virtual delivery programme and also support with the face to face delivery within CEC.

1:11

And joining me today, I've got Tahmid from our customer service team.

1:14

Tahmid, would you like to jump on and say hello?

1:17

Good afternoon everyone.

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My name is Tahmid.

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I'm a part of the customer service advising team.

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If you guys have any question revolving around today's session, please do just leave it in the Q&A down below and I'll be happy to help.

1:27

Thank you.

1:29

Brilliant.

1:29

Thanks very much Tahmid.

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So great to have you along to support the session today.

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To just to sort of reiterate really there what Tahmid was saying.

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So if you do have any questions, any queries, any concerns, again, this is a new part of the Compass+ product that if you can put them in the Q&A, the group chat and Tahmid will be able to work his way through them as we deliver today's session.

1:52

So just some learning objectives to start off with.

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So at the end of today's session, we would like you to go away with an understanding of the benefits of the new activities reporting features.

2:02

So really identifying and seeing what you can use this particular part of the product for, for you to learn how to analyse the data effectively and use this to inform further careers planning.

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So depending on your needs or strategic plans, whatever it may be that you are searching or wanting to

know data on that, how that can then be used for your careers planning. To identify those learners who have not attended specific activities.

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And then again, to allow you to enable intervention and reach out to those learners and again, satisfy their needs

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whilst they're at your institution.

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And then with all of our training, we will always leave time to direct you to where you can access further training and support.

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If there are any further issues from today's session that we will give you advice and guidance around where you can find support with that as well.

2:54

OK, So just to start, I'm just going to take my camera off there.

2:58

OK.

2:58

So just to kind of start with in terms of lining up what Compass+ can do and what it is all about sort of within your institutions.

3:09

So on the right hand side there we've got about creating an institutional memory.

3:12

So we'll want to avoid that single point of failure and Compass+ very much does that.

3:16

So by allowing you to future proof your careers provision and that can be housing and storing all the data in Compass+ itself, having the right amount of users at the right level within your Compass+ account allows for that continuation and that longevity of being able to plan for careers within your particular institutions.

3:39

So hopefully we're also going to show today how you can sort of evaluate and analyse data and information certainly to your activities to allow you to plan effectively to meet the needs of those learners that may be missing out based on that information and data that you get back from today's particular session as well.

3:59

Other areas that Compass+ is really great at in terms of providing you with that support and structure for your careers plan

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is that centralised area for your careers partners.

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So housing all of your businesses and employers kind of like a little black book and housing them all in one place within the product allows you at ease to reach out to them, to attach them to activities within your careers programme.

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And really to allow you just to keep everything up to date in terms of being able to support your learners from a diverse perspective,

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so that when you do create events and activities, you've got the right businesses and employers that can support with those activities as well.

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So just again, not reading all that verbatim, but just a snapshot really as to sort of how useful and powerful Compass+ can be in supporting you with your careers plans and activities.

4:57

OK, So just moving on to today's session.

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So we've got a little bit of a screen grab there of what the information that you can start to filter on within the activities reporting function, what it can look like.

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So for example, anything in red, underlined or in a box, these are different filters that you could possibly use whilst you're using the products.

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Again, anything that's on the screen, you can apply a filter to.

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So depending on whatever it is that you want to gather information and data on, if the member of SLT who's tasked with careers wants to know, you know, what activities do you have on your programme at the moment that meet the PAL requirements or are PAL compliant, you could do research on that.

5:44

You could look to see what learners have been absent through your activities that you've completed during your academic year.

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So there are lots of different ways that you can apply filters to the activities report function of which we're going to demonstrate a few today.

6:04

But please, like I just mentioned at the start, this is the first iteration and the first demonstration of this particular function within Compass+.

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And as it is relatively new and with them may not be, sorry, the opportunity to go through all the difference requirements that you might need from it.

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But based on the feedback you hopefully give today, we can then support with that in the future.

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OK, so at this point, I'm just going to jump into my demo account and then start to demonstrate where we can find this data, find this information.

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So when you've got logged into Compass+ on the left hand side here, we've got our navigation bar.

6:44

So where we're interested in today is clicking into activities.

6:48

And then from there if we click into your activities, Compass+ then takes us to this page here.

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Now this is where all of your activities will be housed.

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And the section that we're interested in is this one here.

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So we've got our activities reporting.

7:01

So if I just click into this and what you'll notice straight away is these are the different builders and functions that I can select upon which are relevant to the screen grab that you just saw earlier.

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And at the moment we've got 3 mandatory or 3 fields, sorry, that are already selected.

7:19

Now just to sort of point out some of the, let's say the quirks or the relevance in the time saving to using Compass+

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I'm selecting lots of different sections here that I may want to apply a filter to if I then got that data information, but I want to apply a new filter or a new search rather than having to deselect all of these individual fields

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if I just press select all and then press it again, it basically wipes clear that last search.

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So it's a bit of a time saving tool, albeit not huge amounts of time, but it's less frustrating as well when you are needing to deselect it and reselect your search criteria.

8:04

So that's our first part there.

8:06

OK, So what I want to just point out to start with is we've got 63 activities in our current plan.

8:12

And the first thing that I am going to search on is if I've been asked, Peter, you know, what activities within your plan involve parental engagement.

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So what I could do there is if I select the the main category and then that is going to allow me to see what benchmark things relate to, then I am going to move along to see if things are a parental engagement.

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So if I then just click on to that one and then I click onto the year group.

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So I want to see what year group these activities are for.

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So what I've got down the bottom here now is I've got my activity name.

8:49

I've got my main category which is this one here selected.

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I've got my does this activity is it for parent or learner?

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Because I want to know if it's for my parents and then I've got my year group selected as well.

9:01

So for this one, if I just want to select on parents, what compass+ has then done

9:07

Is it said right

9:07

out of all of your 63 activities, Peter, two of them at the moment link to parental engagement.

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OK, so I can download a report for that.

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Compass+ will then let me know what I am downloading the report on, if I've got any filter applied, etcetera.

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If I just download that and move this a little bit, if I download this spreadsheet, Compass+ now presents me with this.

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So I've got my little title at the top to tell me for my activities for the 24/25 year.

9:42

This is what it

9:44

entails and then I've got my little headings across the top.

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So I can see that these are the activities that include parental engagement that are within my plan.

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I can see what year groups are attached to them as well.

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And if I wanted to from this particular spreadsheet, because we've got little hyperlinks here, I could select on one of the hyperlinks and what Compass+ will do, it will take me back into my account and show me what this particular activity is.

10:11

So it's including parents.

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So in terms of that parental engagement for our activities, we need to prefix our activity titles with including parents.

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We can see which benchmark it's achieving.

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And then for this particular one run, having actual groups attached and year groups, I've got actual individual learners.

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So I can see what activities I have got planned for my learners and where they're housed within compass+ as well.

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I'll just go back to Excel.

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So that was the bottom one that wasn't year groups attached.

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If I click on the top one compass+ will then take me to this one, which lets me see, right

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I have different year groups attached to this in terms of that parental engagement activity.

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And it's just let me start to see where I may need to start to increase that potentially or I can then report that information back to whoever it is that needs it.

11:10

That's how we may search on our parental engagement.

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OK, Now if I just close these ones down, if I go back to my reporting function and if I just select and then select all again, I am going to now have a look and see what activities I have got that will link to PAL compliance as well.

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So if I'm in my 24/25, so I want to deselect that I want to look on my main category, I'm going to select the meets PAL requirements, I want to look at the status because that will be completed, not completed.

11:52

And then I would look at particular benchmarks as well.

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So I've got my benchmark fields here, now normally if they are PAL compliant, they will be benchmark 5 and 7.

12:04

If it meets PAL requirements, we can select yes, and then we can see what activities we have got planned.

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So again, if I just download this report, big download here, I can now see what activities I've got planned or particular benchmark which is five and seven and what those activities are.

12:28

So I can then start to see am I meeting my requirements for my PAL compliance?

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You could apply more filters on to that as well.

12:37

And you could then start to filter on a year group.

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So then if I do it for year group now and did the download report, what I could then maybe see is the breakdown of, right, am I having the right amount of interactions with my learners, with employees, with businesses?

12:58

And I can start to see, you know, as long as I've got at least two per academic year, then I'm starting to hit that requirement.

13:05

So it can allow you to really look at and see are there any year groups missing those particular requirements?

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So that's how we could do search on our PAL requirements.

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Again, all of these when you are doing your searches will be purely linked to whatever your specific need is, if you've been tasked to have particular or provide particular information on certain areas.

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So the next one I'm going to have a look at is maybe who our missing learners are.

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And so if you have been tasked to say who are the learners that are missing out on particular activities?

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I don't have a lot of strong data in 24/25, but I'm going to use my previous year.

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So if I select and then deselect that, and if I again look at my main category, my status, and because again, when we're looking at learners who have missed out, it's only ever going to be relating to activities that should have been completed.

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We could then look at total number of learners that were invited to activities and then learners that were absent as well.

14:03

And so down the bottom here, all I want to filter on is my completed activity.

14:08

So these are my completed activities here.

14:10

If I do a little filter on the number of absent learners.

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So rather than having all the information and data a little bit skewed, if I just selected now, it's letting me know what learners have missed, what particular activities.

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And what I could then do is I could just select on the number 2 and what Compass+ will do, it will give me a breakdown of who those two learners were that's missed out on that particular activity.

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So again, you can download that information into your spreadsheet and you can see right.

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So these two learners missed out on benchmarks 7 activity and then you can start to again make those interventions, make those changes to your plans to start to address the needs of those 2 learners.

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Again, certainly if it's benchmark 7 and 5, it's around, you know, make sure that we are providing all of our learners with those meaningful interactions and experiences in the workplace with employees and businesses.

15:05

And the last one that I'm going to sort of demonstrate here is you may have been asked by a member of SLT that's involving careers.

15:16

You know of all of your activities that you've got within your plan, what percentage of those learners are on free school meals.

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So what we could do there is if we select main category, then if we go status, if we look at our free school meals and then if we go with total number of learners.

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And then if I download this report here, click download, Compass+ then takes me or brings me this spreadsheet here.

15:43

So we've got these are all of the activities within my plan.

15:47

I have got how many learners are on free school meals and the total number of attendance.

15:54

So what we could do here is if I just click at the bottom there and then do an autosum

16:00

And if I do it for both of these columns here, what we can see is, you know, we've got 8000 learners overall activities in the academic year have been invited to or included in activities.

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Of those eight thousands just short of 2000 of them were learners that were on free school meals.

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So we can kind of gauge there that we're almost 25% of learners of all learners that have been added to all activities.

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25% of those learners were on free school meals.

16:33

So again, we could then start to to analyse that data and making sure that we have got the right amount of

activities for our particular learners and that is just another particular way that we could start to analyse that data and information.

16:50

So let's not save that one there.

16:52

So what you will notice here just before I go back into the slide deck and again there's lots of different ways that you can cut and slice this data that is within the activities reporting.

17:03

There could be, you might want to look at what providers have you invited along to activities for benchmark 5 and 7.

17:12

So you could, you know, you can apply lots of different filters to your specific requirements or your specific request to provide information and data to those within your institution.

17:24

So hopefully that gives you a bit of a snapshot and a bit of an idea as to how you can start to analyse and interrogate this part of the product.

17:37

So just jumping back into my demo account. just really going through it and hopefully a lot of the things that are on here have already been covered today in today's session.

17:46

So to clear all filters, select all and then unselect all, I've showed you that.

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So once you've got those filters applied and that you can very quickly, if you've got quite a few, rather than having to deselect them all individually, you could do that quite quickly with the click of a button.

18:01

We've looked at who's the learners that may be missing out on particular activity.

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So by looking at those completed activities, looking at your total number of learners and then those absent, we can start to focus in on any amount of learners that may have missed particular activities and events.

18:19

We can look at those parental engagement.

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So again, this is a really key part of careers and keeping our learners engaged is having those parental engagement activities that parents and carers really informed of what their son and their daughter are doing in terms of careers, but also what the labour market looks like as well.

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So they can then best support from a home perspective as well.

18:44

We've looked at using our activities reporting, sorry, to track our PAL compliant activities.

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So again, a statutory requirement now that we have and introduced our learners to businesses and employers and then how have we done that so showed you there how we can look at different year groups and making sure that they're having the relevant number of interactions with employers.

19:07

We've looked at the the different filters to offer to key groups so we looked at free school meals, but there's obviously lots of other characteristic groups that we can select on as well.

19:20

We were looking at monitoring the attendance for key benchmarks so we were filtering there on the attendance of our learners and we can see how we were relating that to benchmarks.

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And then we've got the downloadable tables called the learner report.

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So every time we download those tables they can be shared with SLT governors, etcetera.

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It's a great way to allow them to see the impact that your careers plans are having, but then also where further support may be required.

19:53

OK, so just coming towards the final few slides and with our training and support, we always start at the bottom and work up.

20:01

So we always say that if you are having any problems or any areas that you need support with, to reach out to your ECs, your Hub support.

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They are there to support you.

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As much as possible, they've got a great network that they can sort of reach out to.

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So if there are any areas that you're struggling with that they can then put you in touch with sort of other schools within your area.

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They can then support with with any of the parts that you may be struggling with.

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We've got the self paced online learning.

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So this is obviously it's a free tool like it says there and it's designed around you going online and at your own pace, just developing your confidence and confidence in using the system.

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So it takes you through step by step and allows you to look at all the different functionality areas within Compass+. Within our help centre, which I'm just going to go back into, within our help centre in this little section here on the navigation bar down at the bottom here we have our webinars.

20:57

So webinars like today's will be housed in here once everything is complete.

21:02

So you can view all of the previous webinars that we do bitesize or full deep dive and we do them again on all these areas here on the navigation bar.

21:13

You can also sign up to the future webinar.

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So on Thursday this week we have, sorry, tomorrow even, we have the future skills questionnaire webinar.

21:22

So you could sign up to that.

21:23

If you want to know how to analyse data and information based on that, we've got our webinars there.

21:30

We have all of our articles here in this left hand section so if there were any areas that you needed support with, even from getting started, logging on, creating user accounts, etcetera.

21:43

They will be all housed in here.

21:45

And then we've got our customer support or contact support.

21:48

So if there were any areas that you're still struggling with and you'd reached out to ECs and you'd explored all these avenues here that you could still reach out to our contact support, which would go through to Tahmid and the team.

22:01

And you would just fill in the short description of the problem that you were experiencing, send that through and that would generate a ticket.

22:07

Tahmid and the team would work their way through that and hopefully find a resolution for your screening.

22:14

OK, so just a final couple of slides.

22:15

Now this is around our training offer. So access through the QR code on the left hand side there.

22:20

This is our careers leader training.

22:22

So we have a fully funded careers leader training programme.

22:25

It's designed all around giving you the best opportunity to be the best careers leader you can possibly be within your particular institution.

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So I'm keeping you up to date with all of the statutory requirements.

22:37

All of the guidance is in there and it's really about helping you navigate the role of careers leader with the limited amount of time that some of you may have within that particular role and really supporting you the best way that you can.

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So it's it's delivered and supported by these training providers.

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At the bottom you would just go on and then you would register your interest and log on to a session.

23:00

And we've got our wider training.

23:02

Here so gain access via the QR code and this is on our digital hub.

23:06

So you again could sign up and work through the training modules here.

23:12

So we've got this one highlighted, which is the careers in the curriculum awareness.

23:15

So you kind of would link into today's session, but you could certainly work your way through these and focus on a particular area that you may feel that you need help and support with.

23:27

OK, last slide before the feedback slide.

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And this is the what's coming soon.

23:31

And so we've got hopefully people that are on the call have heard of the careers impact system and one of the elements of the careers impact system is the internal leadership review.

23:41

You can find information and guidance around that in this particular article here.

23:46

So if you were starting to prepare and plan to complete the internal leadership review, there's some advice and guidance within this particular article as to how you can do that, who should be involved, etcetera.

23:57

So we could access that they're really, really an important part in the new up and coming almost a hot potato within the compass+ world.

24:06

Then we've got the bottom article here and this is another really important one, the updates and development.

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So this is linked with the product team and like today's session would be proof of that

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there are lots of developments within Compass+, things like activities report and custom reporting with FSQ, you've got learning reporting.

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So there's lots of new developments within the products that are either out now or certainly coming soon as well.

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And this article is a really good one to stay up to date with those and how things are progressing.

24:35

OK, so that just brings us to the close on that session a little bit short, sharp and hopefully as it was our first delivery of this particular element of Compass+.

24:48

I hope that you found that useful and beneficial so that you could start to go away and really see where you can drill down into those particular areas to cover that data and information.

24:58

So if we could get you to access the QR code and leave feedback from today's session to identify if what we went through was relevant, if it was certainly useful for you.

25:10

And there's some really good takeaways as to what you can start to do.

25:14

But again, just mentioning what I did before around the first iteration of this.

25:18

So if there are any improvements, if there are any areas that you might like us to go through or be able to showcase within future sessions as well.

25:29

So we take all of that feedback on board and really are grateful for it as well.

25:34

So just at this point, it leaves me just ask Tahmid, are there any questions outstanding in the Q&A anything that we need to go back through. Hey Pete, nothing outstanding at all.

25:45

Thank you.

25:46

Brilliant.

25:47

Great.

25:47

Thank you very much for your help and support today, Tahmid.

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It's much appreciated.

25:51

So yeah, thank you everybody for joining us today.

25:54

Hopefully you have found that useful and the takeaway and our call to action would certainly be to go away and start practising having a play really for want of better word with that activities reporting function to see what type of data information you can take out of it.

26:09

What might be some of the requirements for members of SLT, what information they may be interested in and start to see if you can sort of glean that from the product.

26:18

So hopefully it was really useful and thank you very much for your time coming on today and hope to see you on a session soon.

26:26

Thanks now bye, bye.