



Student Success Toolbox Project

Guide for Supporting Flexible Learner Transition

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Appendix One - Transition Plan Audit

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NATIONAL FORUM
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Acknowledgment

This Transition Plan Audit is an adaptation of the Induction Audit produced by the University of Ulster's STAR (Student Transition and Retention) project, which was led by A. Cook and B.S Rushton.

Online Orientation Audit.

The [Student Success Toolbox project \(www.studentsuccess.ie\)](http://www.studentsuccess.ie) is funded by the National Forum for the Enhancement of Teaching and Learning in Higher Education.

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If you are using the audit with other staff: This audit is too long to maintain interest in a time-limited session. If you wish to use it with a group of staff, please select those questions that are most appropriate and delete the others.

Overview

As flexible learners move into and through our Higher Education system they have to deal with a number of factors. Most flexible learners cope well and go on to achieve their educational goals, but for some, one or more of these factors can become insurmountable. Difficulties encountered by flexible learners can be academic, involve inaccurate or unmet expectations of an institution/programme, relate to interactions with staff, concern financial or domestic arrangements, or involve relationships with other flexible learners. Institutions can exert some control over some of these steps, while others factors are unpredictable. New flexible learners are especially at risk where they are impacted by a combination of factors.

This audit is designed as a tool that can be used to examine the supports you currently have in place to support flexible learner transition into Higher Education. No one institution could be expected to display all the aspects of good practice implied in this audit. Some questions might address problems that your institution does not have, while others may be beyond the ability of those completing the audit to solve. Considering the questions in this audit, and discussing them with colleagues, should promote reflection and change where advantages are perceived. Implementing effective transition arrangements has costs but so does early flexible learner withdrawal.

This audit contains examples of practice that are for the purposes of illustration only.

To complete the audit, select the suggested options (A, B, or C) that most closely aligns with your current practice. If the question is irrelevant to you leave it blank.

When you have completed the audit, review those aspects of practice scoring 3 or lower. How might this aspect of your practice impact on the progression of your flexible learners? What could you do in practice to increase your score in this area?

	Questions Select the answers that most closely align with what you do in your institution and note the score in the end column. Where applicable, the answer in the highest score subsumes those in the lower scores.	Answers from this column score 1 point A	Answers from this column score 3 points B	Answers from this column score 5 points C	Score
Prior to entry					
1.1	Do recruitment publications accurately portray the characteristics of the institution and/or programme to prospective new flexible learners?	Publications are viewed as marketing	Publications are accurate but contain limited information	Publications give a balanced view of flexible learner life. All course and module details are available	
1.2	How much curriculum information is available to applicants.	We have a written prospectus and this is repeated online.	Each programme produces an information leaflet and/or webpage outlining the course structure and career prospects.	Applicants can access the module descriptions, course structure and information on career prospects from the web.	
1.3	When is the first year curriculum available to applicants?	It is sent with joining instructions	An outline curriculum is available online and in the prospectus.	A detailed curriculum is publicly available online.	
1.4	How much information is available about flexible learner support services.	There are some general statements in the prospectus and/or online	Flexible learner support service information is freely available online.	Flexible learner support services are available at open days and each has its own webpage explaining its function.	
1.5	Are campus visits, or equivalent online events, explicitly encouraged?	No	Campus visits are restricted to large open days	Small open events specific to subject are arranged.	
1.6	Do recruitment practices give an accurate impression of what learning will be like?	Materials with a strong marketing focus are made available to students and/or recruitment events are held	Materials that are used for marketing but contain accurate information on learners' experiences are made available and/or information sessions are held	Materials specifically designed to provide an accurate impression of the learning experience are made available and information sessions are held (possibly with other learners providing information)	
1.7	How are the needs of learners' family members met?	Family members are not catered for but learners are given advice on how to explain their learning to them	Family members can accompany learners to information events	Materials specifically designed for learners' family members and/or events specially for family members are provided	

1.8	Are applicants interviewed?	Either NO or They get a strict interview with no organised tours or meetings	Applicants have an informal meeting with staff with the intention of encouraging them to confirm their application.	All flexible learners are interviewed and given the opportunity to participate in sessions designed to answer their queries accurately.	
1.10	How much contact is there between the institution and flexible learners between application and the start of the academic year	We send them an offer and, if they accept a place, they get joining instructions	Flexible learners are sent information at regular intervals	Flexible learners are sent information at regular intervals, have access to a pre-orientation socialisation course and each applicant is assigned a flexible learner or pre-orientation tutor who they can contact for information	
Orientation (Physical and/or virtual)					
2.1	Do you provide an initial orientation that includes tours (physical and/or virtual) of the department/campus and meeting of academic and support staff?	We let flexible learners explore the campus/virtual campus and department themselves and they meet staff as they teach them	Department tour (physical and/or virtual) and introduction to department by staff member	Full campus and department tour (physical and/or virtual) and then a meet and greet with the academic and support staff	
2.2	Does the orientation utilise a balance of institutional messages and advice framed in the 'world of the learner'?	The orientation delivers key institutional messages	The orientation delivers key institutional messages with a limited space for	The orientation utilises a balance of institutional messages and advice in the 'world of the learner', e.g. using current or past students to deliver messages)	
2.3	Does the orientation focus on setting realistic expectations that new learners can reasonably have?	The orientation delivers key institutional messages to which new learners should attend	There is a specific section of the orientation dedicated to addressing new learners' expectations	The orientation design is centred around setting realistic expectations that new learners can reasonably hold.	
2.4	Does the orientation expose new learners to/provide new learners with access to positive flexible learner role models?	The orientation delivers key institutional messages to which new learners should attend	There is a limited amount of exposure/access to positive flexible learner role models, e.g. some printed and/or video testimonials and/or advice from current/past students	A substantial amount of orientation content comes from positive flexible learner role models, e.g. printed and/or video testimonials and/or advice from current/past students, and interaction with current/past students (face to face or virtual in discussion forums, virtual classrooms etc.)	
2.5	Are trained flexible learner mentors involved in initial orientation?	Flexible learners are not involved in orientation activities	Untrained flexible learner guides are used in orientation activities, e.g. as orientation guides to the campus	Trained flexible learner mentors and involved in small group activities	
2.6	What percentage of flexible learners attends orientation?	<50%	50 – 80%	>90%	

2.7	Are social activities organised for new flexible learners in orientation week.	No	Yes this is organised by the students union	Events are organised by the programme team to ensure that new flexible learners get to meet staff and their peers.	
2.8	Do family members accompany flexible learners to orientation activities	No, we don't invite family members and activities are not designed to include them	We don't discourage them but don't officially invite them	Yes they are invited and there are separate activities for them	
2.9	To what extent do you induct flexible learners in course groups	All flexible learners entering the faculty/ school are dealt with together	Some events are arranged that are specific to courses	Flexible learners on our course are brought together initially and we try to keep them together for most orientation activities.	
2.10	What course specific matters are included in the orientation.	We use a general orientation which covers all the flexible learners	We use a general orientation to cover introductory topics and then cover course specific topics in course specific groups	We induct our flexible learners in an off-campus residential or online orientation which focuses on course specific topics	
Advisors of study					
3.1	Does each flexible learner have a named advisor responsible for pastoral care?	No	Learners are provided with helplines/staff contact details, to be used if they have any queries/problems	Yes they are officially assigned one at registration	
3.2	Do you have an academic tutorial system responsible for flexible learners' academic development?	No	Yes, academic tutors are available and respond to flexible learner needs	Yes, academic tutors are proactive in predicting flexible learner needs and meeting them	
3.3	Before changing courses or modules is the flexible learner required to confer with and seek approval from an academic advisor?	No they can change modules or courses themselves	They need to complete a form which is countersigned	They need to discuss it and get an official form signed	
3.4	What procedures are there for flexible learners who wish to exit their course?	We only find out when the flexible learners fails to attend the exams	Flexible learners complete a course exit form	Flexible learners normally have an exit interview in which their problems are discussed	
3.5	On average how many first year flexible learners does an 'advisor of study' have?	>15	7 - 15	≤ 6	
3.6	How frequently does an advisor meet (Physically or in virtual meetings) his/her assigned flexible learners?	Each term	Each month	Each week	

The curriculum					
4.1	Does the 'first year' curriculum contain opportunities for flexible learners to get an introductory overview and rationale of the course?	No each module is self-contained	This information is contained in the course handbook	There is a detailed handbook and it is discussed with the flexible learners.	
4.2	Are flexible learners introduced to the assessment methods involved?	No, flexible learners learn how to complete assignments by completing them.	We do a light overview of some of the assessment methods.	Flexible learners receive an in-depth briefing on assessment methods, and are only formally assessed after they have the opportunity to practice.	
4.3	Is the teaching strategy in year one coherent so that modules are purposefully connected and sequenced?	No, the modules are independent	Only core modules link together	All modules were designed to link together under a coherent assessment strategy	
4.5	To what extent is your curriculum sensitive to diversity within your new flexible learner cohort?	The curriculum and its delivery is the same for everybody	There are a limited number of ways in which flexible learners can construct a curriculum, in terms of modules taken and delivery method, e.g. face to face or online, to suit their specific needs.	Flexible learners can construct a curriculum, in terms of modules taken and delivery method, e.g. face to face or online, to suit their specific needs.	
Academic support					
5.1	Do you identify 'at risk' flexible learners prior to entry?	No	Yes, a limited number of metrics are used to place students in an 'at risk' category	Yes, advisors closely monitor their progress	
5.2	How do you identify 'at risk' flexible learners after entry?	Through failure	Participation levels (e.g. attendance and/or activity in the VLE) are monitored OR Performance levels are monitored	By examining pre-entry characteristics, monitoring participation levels, and monitoring performance levels	
5.3	Are flexible learners' basic academic skills assessed on entry? Are different experiences available for flexible learners with different skills?	No	Yes, diagnostic testing leads to different recommended modules	Diagnostic testing followed up by individual action and learning plans	
5.4	Are flexible learner support services highly visible to new flexible learners?	No	Advisors/course staff recommend flexible learners to access available supports	Yes, flexible learner services are proactive in seeking to help flexible learners, especially those deemed at risk	

5.5	Is there a peer-mentoring scheme available?	No	There is a scheme but no training involved	There is a formal system involving training of peer-mentors	
5.6	At what stage do you identify the requirements of flexible learners with special needs?	Within modules	Needs are assessed at enrolment and then support is put into place	Needs are assessed at enrolment, which triggers an existing protocol. Extensive liaison takes place with both academic and support staff	
5.7	Do academic staff receive specific training to support flexible learners with special needs?	No specific training given	Training is offered but up-take is poor OR text-based guidelines are made available to academic staff	Training is available and most academic staff have received training	
5.8	Do support staff (technicians and secretarial/clerical) receive specific training to support flexible learners with special needs?	No specific training given	Training offered but up-take is poor OR text-based guidelines are made available to support staff	Training is available and most support staff would have received training	
5.9	Who takes responsibility for recommending alterations to enable flexible learners with special needs to undertake a degree programme?	We leave such matters to central services	Technicians might give advice	We involve central services, academic and support staff in discussion with the flexible learner to determine needs	
5.10	Do you think the needs of flexible learners with special needs are met?	Generally no; we could be more proactive	Yes, but much of the support is ad hoc	Yes; flexible learners are given a high level of support from initial application to graduation and we are proactive in determining needs	
5.11	Do flexible learner support services provide academic staff with diagnostic feedback that allows appropriate support to be given to flexible learners at risk?	No, flexible learner support is confidential	Yes, generic feedback is given	Yes, detailed feedback is sent with flexible learner consent	
Flexible learning					
6.1	To what extent do you encourage flexible learners to reflect on the way in which they learn?	No explicit study skills support is provided	There are study skills workshops focused on giving hints and tips	Credit bearing study skills activities are built into course modules, and these seek to promote flexible learner development and self-awareness	
6.2	How do you promote the development of learning communities?	No attempts are made to encourage the formation of support groups	Group work is only used to increase the efficiency of practical classes	Learning communities promoted (e.g. by group tasks, team building etc.)	

6.3	How do you promote self-belief and academic confidence?	Study advice and flexible learner support given in response to actual or impending failure	Study advice and flexible learner support given to all flexible learners as a remedial exercise	Study advice and flexible learner support given to communicate the expectation of success	
6.4	How do you promote learner independence?	Flexible learners are expected to learn independently because support is removed from all but the weakest	Learner independence is promoted by the provision of independent learning materials	Learner independence is promoted proactively by e.g. setting individual tasks and promoting learner self-awareness e.g. using reflective activities in assessments	
6.5	How do you know when to offer support and to whom?	No flexible learner tracking system in place. Advisors/academic staff follow the progress of advisees when time permits	A flexible learner tracking system is in place but not linked to effective support	Tracking flexible learners' performance and attendance is a specific responsibility linked to proactive support	
Extra-curricular activities					
7.1	To what extent are flexible learners involved in campus life; e.g. campus employment; volunteering; flexible learner clubs and societies?	There is very limited extra-curricular activities	Flexible learner participation is limited to flexible learner clubs and societies	Flexible learners have a key role in non-academic events on campus	
7.2	Are social and work areas available for those who live off campus?	No	Limited space available for working between formal contact hours	Yes there are 24-7 resource centres and coffee bars	
Staff-flexible learner contact					
8.1	How available are staff to communicate with flexible learners outside formal contact time?	Flexible learners regularly complaining about how difficult it is to communicate with staff	We get the occasional complaint about staff availability	Flexible learners have complimented the department on how accessible the staff are	
8.2	Are staff contact details available to flexible learners?	No	Limited contact details are provided	Yes, detailed staff contact details are provided in a format that indicates what staff member should be contacted in a particular instance	
8.3	Are there intentionally planned programs, or procedures that are designed to promote flexible learner-staff interaction outside formal contact time?	No	Occasional events organised	Regular staff-flexible learner social events are organised	
8.4	Are academic staff involved in flexible learner clubs and societies?	No	Staff are often members of the clubs and societies	Yes, staff involvement in running clubs to ensure continuity	

8.5	What procedures are there for ensuring that part-time teaching staff are available for flexible learner consultation outside formal contact time?	None	Staff are encouraged to make themselves available	There are staff office hours (for face-to-face and/or online contact)/timetabled access	
Administrative leadership					
9.1	Is it clear to flexible learners that the leadership of your school/ section/ department supports these transition activities?	Very few staff are involved.	Transition activities are supported by a variety of staff but senior staff are conspicuously absent	Many staff are involved in transition activities and senior staff in the give it a high priority	
9.2	Do Heads of Departments/Schools make resources available for the support of first year flexible learners?	No	Staff involvement acknowledged and limited funding available	Transition activities counted as teaching hours and funding available for academic and social events etc.	
Institutional research					
10.3	Are satisfaction surveys of first-year flexible learners conducted to assess their perceptions of the quality of their first year experience?	No	Limited information is sent back to each department	Yes, detailed information is fed back to each course and influences developments	
10.4	Is the assessment of flexible learner satisfaction and flexible learner retention conducted with respect to different flexible learner subpopulations (e.g. commuters, ethnic and racial minorities, gender)?	No	Yes limited information is gathered	Yes, this information is gathered from the questionnaire and fed back to courses	
10.5	Do you investigate the reasons why flexible learners leave?	No	Reasons for leaving recorded at time of withdrawal	Post withdrawal surveys are conducted and analysed	
10.6	What percentage of your flexible learners leave or transfer to other courses without failing.	>15%	5-15%	<5%	