



SUB-REPORT:

Matrices for assessing psycho-social outcomes and indicators



Penny Morrell
May 2021

Research funded by
the DG Murray Trust

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THIS SUB-REPORT

This report is one of the products of a two-year research project which set out to discover what difference bursary support providers (BSPs) may make to student success at universities – and what their (unique) contributions to this might be.

Funded by the DG Murray Trust and commissioned by the Rural Education Access Programme (REAP), the project was carried out in active close collaboration with members of the National Bursary Support Providers Forum (NBSPF), a network of about 25 organisations which support university students in South Africa.

Working on measuring psycho-social outcomes was the most innovative part of this research. As the claim has historically been that psycho-social support is what this sector can uniquely offer, finding out the extent of the difference they make – and which bits are the most effective – was a key question, but also the most evasive.

Nonetheless the research undertook to identify psycho-social competencies / outcomes that would both support academic success and be an outcome in their own right inasmuch as they contribute to employability. Eight outcomes were eventually agreed to following a review of international workplace competencies – and 28 indicators with rating tools were developed. These are being piloted by two organisations and a third which is piloting their own set of outcomes, will be participating in the conversations about what is possible.

This sub-report presents the four-scale matrices for assessing all indicators of all psycho-social outcomes.

Other psycho-social sub-reports are:

Towards measuring psycho-social outcomes in the bursary support provider sector	Nov 2020
Eight psycho-social outcomes and their indicators	May 2021
A selection of compulsory indicators for assessing psycho-social outcomes: An example	May 2021
Measuring psycho-social outcomes and indicators: A Guide	May 2021

Access to the reports

These sub-reports, along with the full research report and a shorter version comprising the executive summary and findings, are posted on the REAP and NBSPF websites at

<https://www.reap.org.za/pages/reports.html>

<https://nationalbursaryforum.org.za/resource-portal/>

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OUTCOMES, INDICATORS – AND THEIR MEASURING MATRICES

This document presents matrices for assessing eight psycho-social outcomes and related indicators.

It comprises a four-point rating scale, with each point being described in relation to the particular indicator. While subjectivity can never be eradicated, these detailed matrices are an attempt at having assessment criteria which facilitate conversation between the student being assessed and their mentor. Our approach is that this assessment is best done in an open, shared and developmental way in which the student participates actively.

Possible sources of evidence are also suggested.

Ideally where and how to record assessments in relation to each student should be built into existing case management databases.

This system is being piloted in a few organisations in 2021/2022.

Outcome 1 : Communication – oral and written and including emotional intelligence

Articulates thoughts and ideas clearly and effectively, verbally and in writing, in ways suitable to internal and external audiences. Is able to express ideas interpersonally and in public fora.

Indicator 1.1: The student produces error-free well-structured written communication in English.

Proposed matrix
Written communication in English
1. is poorly structured with many grammar/spelling errors.
2. has a bit of structure with some grammar/spelling errors.
3. has structure and only a few grammar/spelling errors.
4. is well structured and has almost no grammar/spelling errors.
Evidence
Writing skills as seen in regular written reports – e.g. emails on their own progress.

Indicator 1.2: The student's verbal communications in English are clear, confident and to the point.

Proposed matrix
Verbal communication in English is 1. unclear and unfocused but fairly confident when speaks OR fairly clear and focused but is not confident when speaks 2. not always clear or focused but fairly confident when speaks OR fairly clear and focused but is not always confident when speaks 3. mostly clear and focused; fairly confident when speaks. 4. clear and focused; confident when speaks.
Evidence
<u>Observations of behaviour</u> Their verbal communication skills are seen when participating in student group sessions and/or workshops presenting their self-assessment to a (staff) panel.

Indicator 1.3: The student conveys their messages in ways that are suitable for the intended audience.

Proposed matrix
Messages are conveyed in ways 1. unsuitable for the intended audience/person. 2. only partly suitable for the intended audience/person. 3. mostly suitable for the intended audience/person. 4. entirely suitable for the intended audience/person.
Evidence
<u>Observations of behaviour</u> The suitability of their verbal and communication are seen in the language they deploy in • written and verbal communications to individuals and groups; and • their presentation of self-assessment to a (staff) panel.

Indicator 1.4: The student participates meaningfully in group sessions.

Proposed matrix
Participates in group sessions 1. but contributions not meaningful OR does not participate (either actively or quietly) in group sessions. 2. and contributions are sometimes meaningful OR participates (actively or quietly) only a bit in group sessions. 3. and contributions are mostly meaningful OR participates (actively or quietly) quite a bit in group sessions. 4. and contributions are meaningful OR participates (actively or quietly) fully in group sessions.
Evidence
<u>Observations of behaviour</u> Levels of participation and the value of their contributions are seen in their participation in student group sessions and/or workshops.

Outcome 2: Teamwork/collaboration / co-ordinating with others

Is able to work within a team structure; participates actively and can negotiate and manage conflict. Builds collaborative relationships with people from diverse backgrounds, lifestyles, and viewpoints.

Indicator 2.1: The student participates actively and confidently in a group, while being aware of others.

Proposed matrix
1. Does not participate actively and confidently in a group, and when they do, they seem unaware of others OR the student participates confidently in a group but does not seem aware of others. 2. Sometimes participates in groups and with varying confidence, but is not always aware of others. 3. Does participate in groups, usually with confidence, and is mostly aware of others. 4. Often/always participates confidently in groups, and is aware of others.
Evidence
<u>Observations of behaviour</u> The manner and levels of their participation are seen in group sessions including workshops and tutorials.

Indicator 2.2: The student can interrogate an idea with others.

Proposed matrix	
1.	Cannot interrogate an idea with others.
2.	Can sometimes interrogate some ideas with others.
3.	Can usually interrogate most ideas with others.
4.	Can interrogate ideas with others.
Evidence	
<u>Observations of behaviour</u> The ways in which they interrogate ideas within group settings – for instance as seen in tutorials and/or workshops.	

Indicator 2.3: The student contributes to achieving team goals.

Proposed matrix	
1.	Does not contribute to achieving team goals - and may undermine them.
2.	Does not undermine team goals but only contributes a little.
3.	Mostly contributes to achieving team goals.
4.	Often/always contributes actively to achieving team goals.
Evidence	
<u>Observations of behaviour</u> The extent to which they contribute to any common goals in, e.g. group sessions especially workshops.	

Indicator 2.4: The student manages conflict in ways that build relationships and ideas and accommodates difference, where possible.

Proposed matrix	
1.	Does not manage conflict well; is either avoidant or engages in ways that does not build relationships and/or ideas and/or does not accommodate difference.
2.	Tries to manage conflict well – but can be avoidant or engages in ways that are not always good for building relationships and/or ideas and/or are not always tolerant of difference.
3.	Mostly manages conflict well, engaging in ways that try to build relationships and/or ideas and/or tries to tolerate difference.
4.	Manages conflict in ways that build relationships and ideas and accommodates difference, where possible.
Evidence	
<u>Observations of behaviour</u> Their management of conflict as it arises in group sessions and/or workshops.	
<u>Self-reporting</u> Reported examples of how they managed conflict e.g. in relationship difficulties.	

Outcome 3: Social and cultural awareness – including service orientation / purpose

- Demonstrates, openness, inclusiveness, sensitivity, and the ability to interact respectfully with a range of people and understand individuals' differences. Respects, and learns from diverse cultures, races, ages, genders, sexual orientations, and religions.
- Acts intentionally and responsibly, with the interests of others and the broader community in mind.

Indicator 3.1: The student actively learns about people who are different from themselves.

Proposed matrix
1. Remains isolated, and with people from similar backgrounds, showing little curiosity about others. 2. Mostly relates to people from similar backgrounds but is open to learning about others. 3. Relates to a range of people and is open to learning more about others. 4. Actively relates to and learns about people who are different from themselves.
Evidence
<u>Observations of behaviour</u> The extent to which they seem able to include / engage with people who are different from themselves – in workshops/ group sessions. <u>Self- reporting</u> Examples of how they handled opportunities to learn about people who are different from themselves.

Indicator 3.2: The student accepts that people have different values and views to them.

Proposed matrix
1. Does not accept that people have different values and views to them. 2. Partly accepts that some people have different values and views to them. 3. Mostly accepts that people have different values and views to them. 4. Fully accepts that many people have different values and views to them.
Evidence
<u>Observations of behaviour</u> The extent to which they seem able to accept different points of view – in workshops/ group sessions. <u>Self- reporting</u> Examples of how they handled opportunities to learn about people who are different from themselves.

Indicator 3.3: The student intentionally contributes to the wellbeing of other people and communities.

Proposed matrix	
1.	Does not contribute at all to the wellbeing of others.
2.	Contributes a bit to the wellbeing of others – but only as required.
3.	Sometimes contributes to the wellbeing of others, without being asked to.
4.	Intentionally contributes to the wellbeing of others.
Evidence	
<u>Items</u> Contribution to others in community service report. <u>Observations of behaviour</u> Behaviour towards others in group settings. <u>Self-reporting</u> Examples of helpful behaviour.	

Outcome 4: Critical thinking / (complex) problem solving, judgement & decision making

- Exercises sound reasoning when analysing issues, making decisions, and overcoming problems. Obtains, interprets, and uses knowledge, facts, and data as useful. Assesses situations or information without simply accepting things at face value. Discerns and weighs various factors, and makes a decision. Changes or adapts their view or approach as necessary. May demonstrate originality and inventiveness. Learns from their mistakes

Indicator 4.1: The student discerns which information and resources are relevant to address an issue or situation.

Proposed matrix	
1.	Does not discern which information and resources may be relevant to addressing an issue or situation.
2.	Sometimes discerns some information and resources that may be relevant to addressing an issue or situation.
3.	Mostly discerns a range of information and resources that may be relevant to addressing an issue or situation.
4.	Often/always discerns a wide range of information and resources that may be relevant to address an issue or situation.
Evidence	
<u>Observations of behaviour / self-reporting</u> Various resources identified as well as the extent to which they might assist in addressing an issue or situation.	

Indicator 4.2: The student assesses their actions with a view to improving where necessary.

Proposed matrix	
1.	Fails to assess their actions and does not improve where necessary.
2.	Sometimes assesses their actions and makes some improvements where necessary.
3.	Usually assesses their actions and makes improvements where necessary.
4.	Often/always assesses their actions with a view to improving where necessary.
Evidence	
<u>Observations of behaviour / self-reporting</u> Examples of reflections on actions and proposals for adapting going forward. Subsequent sessions include reports of following up those changes.	

Indicator 4.3: The student assesses situations or information without simply accepting things at face value.

Proposed matrix	
1.	Fails to assess situations or information and simply accepts things at face value.
2.	Partially assess some situations or information and but still accepts a range of things at face value.
3.	Assesses many situations or information and increasingly does not accept things at face value.
4.	Assesses most situations or information without simply accepting things at face value.
Evidence	
<u>Observations of behaviour / self-reporting</u> Whether they query ideas/ situations – seen / reported on in workshops or individual sessions - rather than just accepting them.	

Indicator 4.4: The student weighs up alternatives and interrogates options before deciding on an action.

Proposed matrix	
1.	Fails to weighs up alternatives and interrogates options before deciding on an action.
2.	Starts to weigh up some alternatives but does not interrogate options before deciding on an action.
3.	Weights up some alternatives and interrogates some options before deciding on an action.
4.	Weights up a good range of alternatives and interrogates options before deciding on an action.
Evidence	
<u>Observations of behaviour / self-reporting.</u> Examples of alternatives developed and options interrogated before deciding on an action.	

Indicator 4.5: The student exercises critical thinking and judgement, and employs creative and adaptable approaches where necessary.

Proposed matrix
1. Does not exercise critical thinking and judgement, and fails to employ creative and adaptable approaches. 2. Sometimes exercises critical thinking and judgement, but largely fails to employ creative and adaptable approaches OR does not exercise critical thinking and judgement, but sometimes employs creative and adaptable approaches anyway. 3. Often exercises critical thinking and judgement, and often employs creative and adaptable approaches OR often exercises critical thinking and judgement, but does not always employ creative and adaptable approaches. 4. Often/always exercises critical thinking and judgement, and employs creative and adaptable approaches.
Evidence
<u>Observations of behaviour/ self-reporting</u> Examples of being discerning – and of being creative and adaptable – in individual and group settings.

Outcome 5: Initiative

Takes considered action in the interests of solving a problem or moving forward, without being prompted to do so. Exercises foresight and strategic thinking and employs creative and adaptable approaches where necessary.

Indicator 5.1: The student takes considered action without being prompted to do so.

Proposed matrix
1. Does not take act without being prompted to do so. 2. Sometimes acts with minor prompts to do so. 3. Mostly acts without being prompted to do so. 4. Often/always acts without being prompted to do so.
Evidence
<u>Observations of behaviour / self-reporting</u> Examples of making a decision and acting without being prompted to do so – in order to move forward.

Indicator 5.2: The student seeks assistance proactively.

Proposed matrix	
1.	Does not seek assistance proactively.
2.	Sometimes seeks assistance proactively.
3.	Mostly seeks assistance proactively.
4.	Often/always seeks assistance proactively.
Evidence	
<u>Observations of behaviour / self-reporting</u> Asking for help without being prompted to do so.	

Outcome 6: Persistence / grit

Persists with a path of action in the light of difficulties and obstacles, be they external or internal. Draws on personal characteristics and external resources to enable them to negotiate adversity. Remains focussed on, and works towards, their goals.

Indicator 6.1: The student persists in the face of contextual difficulty, and remains focussed on their goals.

Proposed matrix	
1.	Defeated in the face of <u>contextual</u> difficulties and is not focussed on any of their goals.
2.	Seems defeated in the face of <u>contextual</u> difficulties, though remains focussed on some of their goals.
3.	Attempts to deal with <u>contextual</u> difficulties, and remains focussed on some of their goals.
4.	Persists in the face of <u>contextual</u> difficulties, and remains focussed on their goals.
Evidence	
<u>Observations of behaviour / Self-reporting</u> Examples of <u>contextual</u> difficulties encountered and ways in which they persisted towards their goals. <u>Specific surveys/self-report</u> Personal reports of descriptions of difficulties - and ways in which they have persisted.	

Indicator 6.2: The student persists in the face of personal difficulty, and remains focussed on their goals.

Proposed matrix	
1.	Defeated in the face of <u>personal</u> difficulties and is not focussed on any of their goals.
2.	Seems defeated in the face of <u>personal</u> difficulties, though remains focussed on some of their goals.
3.	Attempts to deal with <u>personal</u> difficulties, and remains focussed on some of their goals.
4.	Persists in the face of <u>personal</u> difficulties, and remains focussed on their goals.
Evidence	
<u>Observations of behaviour / Self-reporting</u> Examples of personal difficulties encountered and ways in which they persisted towards their goals.	
<u>Specific surveys/self-report</u> Personal reports of descriptions of difficulties - and ways in which they have persisted.	

Indicator 6.3: The student draws on their personal characteristics as well as on external resources to enable them to manage difficulty.

Proposed matrix	
1.	Does not connect with personal and external resources at all to enable them to manage difficulty.
2.	Connects a bit with personal and external resources to enable them to manage difficulty.
3.	Actively connects with personal and external resources to enable them to manage difficulty.
4.	Connects and plans how to use personal and external resources to enable them to manage difficulty.
Evidence	
<u>Observations of behaviour / self-reporting</u> Examples of their taking stock of - and accessing - their own characteristics/ strengths as well as external resources to manage difficulty.	

Indicator 6.4: The student tries multiple methods of overcoming a problem until an outcome is reached.

Proposed matrix	
1.	Makes no attempts to find ways of overcoming a problem.
2.	Tries only a few ways of overcoming a problem and does not persist until an outcome is reached.
3.	Tries a number of methods of overcoming a problem and largely persists until an outcome is reached.
4.	Tries multiple methods of overcoming a problem until an outcome is reached.
Evidence	
<u>Observations of behaviour / self-reporting</u>	
Examples of identifying ways of tackling a problem, over time.	
Where referrals are made – these are taken up.	

Outcome 7: Work ethic / professionalism

Demonstrates effective work habits and personal accountability – e.g. punctuality, working productively with others, time management. Understands the impact of non-verbal communication on others and on professional work image. Demonstrates integrity and ethical behaviour.

Indicator 7.1: The student manages time well, including responding within agreed timeframes.

Proposed matrix	
1.	Fails to manage time well, and does not respond within agreed timeframes.
2.	Sometimes manages time well, responding sometimes within agreed timeframes.
3.	Mostly manages time well, largely responding within agreed timeframes.
4.	Often/always manages time well, responding within agreed timeframes.
Evidence	
<u>Observations of behaviour / self-reporting</u>	
Responds regularly and timeously to communications and delivers reports and assignments in comfortable time.	

Indicator 7.2: The student's physical presentation is suitable to the occasion / people.

Proposed matrix
Personal physical presentation is 1. often not suitable to the occasion / people. 2. sometimes suitable to the occasion / people. 3. mostly suitable to the occasion / people. 4. always suitable to the occasion / people.
Evidence
<u>Observations of behaviour</u> Stature, clothes and behaviour is suitable to the various settings in which the student is observed.

Indicator 7.3: The student demonstrates integrity and ethical standards in their behaviour and choices.

Proposed matrix
1. Fails to demonstrate integrity and ethical standards in their behaviour and choices. 2. Does not always demonstrate integrity and ethical standards in their behaviour and choices. 3. Mostly demonstrates integrity and ethical standards in their behaviour and choices. 4. Always demonstrates integrity and ethical standards in their behaviour and choices.
Evidence
<u>Observations of behaviour / self- reporting</u> Behaviour complies with the organisation's rules and guidelines to do with money and honouring various agreements. Possible examples of doing what is right even if inconvenient or not popular.

Outcome 8: Personal management

Lives and works purposefully towards a vision, in alignment with their values.
Recognises, understands, manages and makes the most of their physical, mental, emotional, and spiritual selves such that they are not blown off course by feelings, urges, circumstances etc.
Are constantly alert to learning about themselves and their contexts.

Indicator 8.1: The student sets personal development goals and actively works towards achieving them.

Proposed matrix	
1.	Does not set personal goals.
2.	Has an idea of some personal goals but does not actively works towards achieving them.
3.	Sets some personal goals and mostly works actively towards achieving them.
4.	Sets personal goals and often/always works actively towards achieving them.
Evidence	
<u>Observations of behaviour / self-reporting</u> Goals are agreed to and progress towards them noted.	

Indicator 8.2: The student retains a sense of self while engaging with personal change and in the face of competing demands from others.

Proposed matrix	
1.	Abandons / loses their sense of self and identity as they begin to change and/or in the face of competing demands from others .
2.	Battles to retain their sense of self and identity as they begin to change, and/ or in the face of competing demands from others – but manages to do so.
3.	Mostly retains their sense of self and identity while engaging with personal change and/or with competing demands from others.
4.	Retains a sense of self while engaging with personal change and competing demands from others.
Evidence	
<u>Self- reporting</u> Examples of how they continued to be themselves / retained their own values while engaging with personal change.	

Indicator 8.3: The student has an understanding of their personality type and uses this information to make positive decisions and choices.

Proposed matrix	
1.	Does not have an understanding of their personality type so has little information to make positive decisions and choices OR some understanding of their personality type but does not use this information to make positive decisions and choices.
2.	Partly understands their personality type but only uses this information sometimes to make positive decisions and choices.
3.	Has an understanding of their personality type but only uses this information sometimes to make positive decisions and choices.
4.	Has an understanding of their personality type and often/always uses this information to make positive decisions and choices.
Evidence	
<u>Observations of behaviour/ self-reporting</u> Plans and actions show understanding of self, optimising strengths and addressing areas that could be developed.	

Indicator 8.4: The student extends themselves, including undertaking unfamiliar tasks despite anxiety/fear.

Proposed matrix	
1.	Does not extend themselves, and does not undertake unfamiliar tasks in the face of anxiety/fear.
2.	Occasionally extends themselves, undertaking unfamiliar tasks only when their anxiety/fear is manageable.
3.	Sometimes extends themselves, undertaking unfamiliar tasks despite anxiety/fear.
4.	Often/always extends themselves, including undertaking unfamiliar tasks despite anxiety/fear.
Evidence	
<u>Observations of behaviour / self-reporting</u> Examples of taking on unfamiliar tasks/ situations, despite anxiety/fear.	