Skills Development Scotland

Mesma User Guide

Self-Evaluation and Quality Action Plan

2024-25

Contents

1.0 Introduction

1.1 Introduction to Self-Evaluation

Your Self-Evaluation (SE) is an opportunity to discuss each topic within the [Self Evaluation and Quality Action Plan (SEQAP) Guidance]

and record this on mesma. Self-evaluation is a recognised tool for driving improvement and gives teams an opportunity to reflect on how services are being delivered, and where refinement is required to improve the experience of stakeholders. Setting aside adequate time for this is very valuable, you should plan to bring together relevant people across your organisation to contribute to the SE process.

Through collaboration with your team you will come to a consensus judgement to **describe what you do, evaluate what you do**, **what you could enhance**.

Your SE is a **live** document that reflects your current practices and should be updated to mirror process changes. It is best practice to do update your SE as changes occur.

1.2 Introduction to Quality Action Planning

A Quality Action Plan is used is to store and track progress toward addressing Areas for Improvement (AFI). Ownership of the Quality Action Plan sits with Learning Providers whose responsibility is to ensure it remains up to date.

When used well, a Quality Action Plan (QAP) will help your organisation focus on priority areas for improvement which should help deliver the changes you want to your modern apprenticeship provision. It can demonstrate a culture of continuous improvement within your organisation and support internal and external audit, review, or inspection.

Describe and evaluate your current provision, utilising the points of consideration in our SEQAP Guidance.

This will enable you to reflect on what you do and how you do it to identify strengths and potential areas for improvement in your Modern Apprenticeship delivery.

Based on your SE, prioritise AFIs to focus on over the duration of your SDS contract, and reflect this in your QAP.

You **MUST** include AFIs related to topics graded as **RED**.

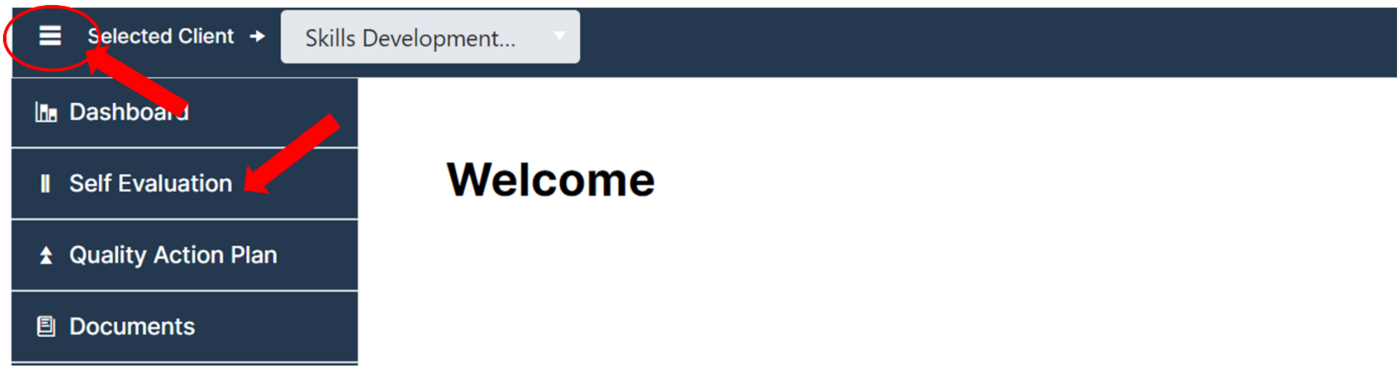
The QAP should be updated at least quarterly to reflect barriers and/or progress against AFIs.

It is the responsibility of the provider to ensure their SE and QAP reflects current delivery and improvement priorities of Modern Apprenticeship Delivery. Where approaches to delivery change or improvements have been made, the self-evaluation should be updated.

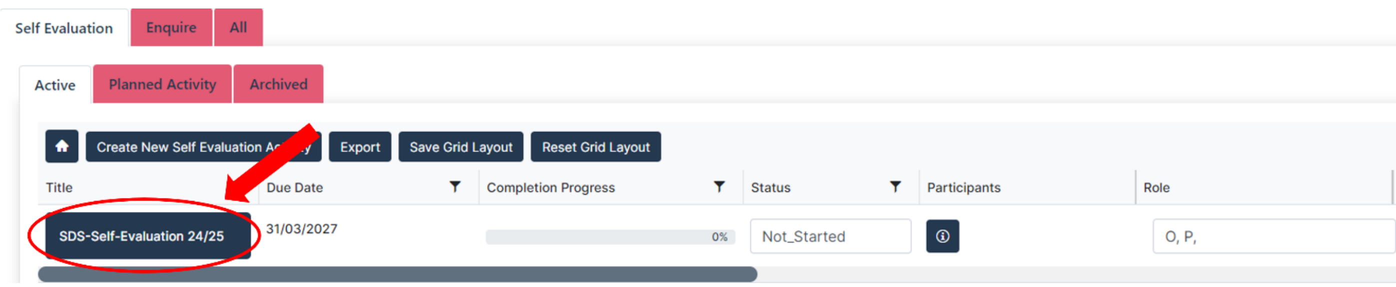
2.0 Completing your Self-Evaluation

2.1 How to Access your Self-Evaluation

1. Log onto mesma here using your username and password. Open the drawer (≡) at the top left of screen and select Self-Evaluation or the icon showing two parallel lines (Ⅱ).



2. To access, select the title of your self-evaluation. The title of your SE will be your organisations name followed by ‘SE’. Please note the due date, which will be set at 2027, is ***not*** the deadline for updating your SE.

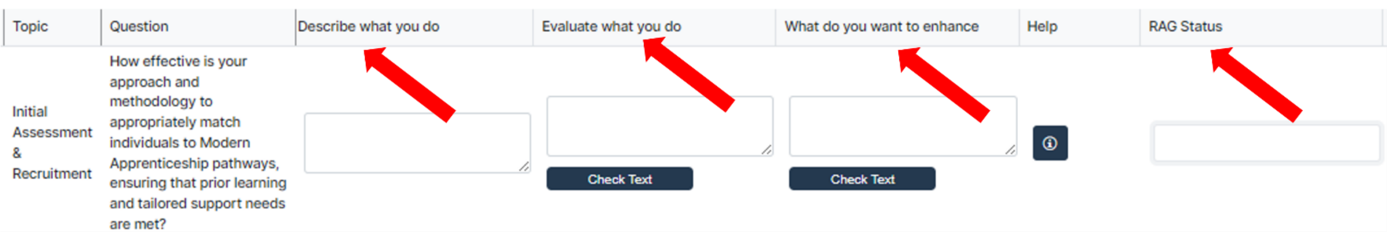


2.2 Understanding your Self-Evaluation

For each topic there are sections to: **describe what you do**; **evaluate what you do**; detail **what you want to enhance**; provide a **RAG** status; and mark the topic as **complete**.

You will be required to complete these sections for all topics, bar **what you want to enhance,** which you should use when relevant.

To understand what we mean by topic, refer to page 5 of the SEQAP guidance.



Within the ‘**Describe what you do’**, detail your current practices related to this topic, using the *points of consideration* within the [SEQAP Guidance] as a prompt.

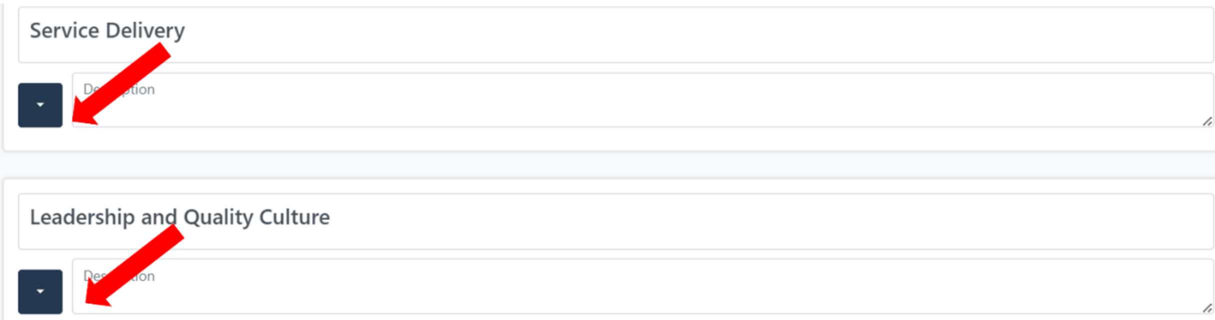
For **‘Evaluate what you do’**, articulate your team’s judgement of how well you think you are doing in relation to the topic. This should inform the next section titled ‘**What do you want to enhance’** which is an opportunity to identify and record areas that could be improved. For examples of evaluative words please click here and please refer to the SE exemplar for further guidance

Provide a **RAG** status for each topic using the definitions shown in the SEQAP Guidance, giving a clear visual on your perception of the effectiveness of your processes.

By selecting the information icon ( ) under help, a hyperlink to the self-evaluation guidance will appear.

2.3 Editing your Self-Evaluation

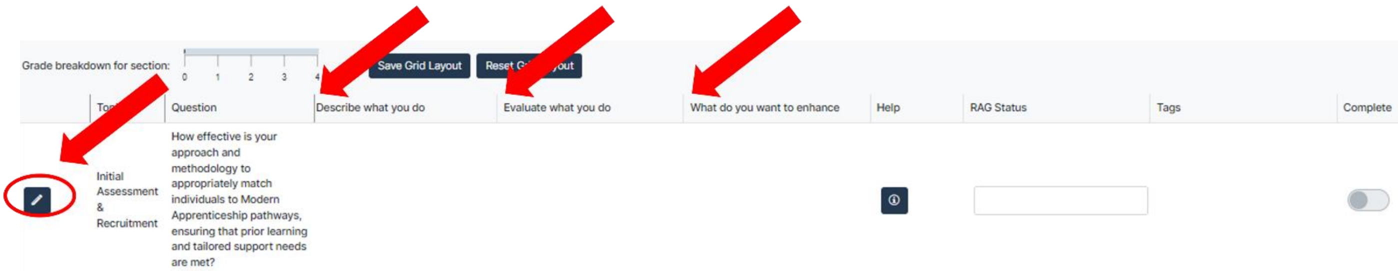
1. Once in your Self-Evaluation, you will see the page below with the two quality standards, ‘**Service Delivery’** and ‘**Leadership and Quality Culture’**. Select the downward arrow ( ) to expand and view the content within the standard.



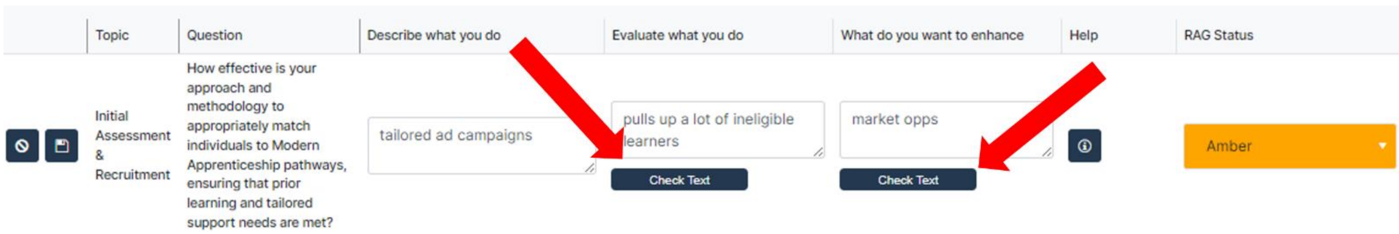
To edit the content, select the pencil icon ( ) highlighted below. Once you save each section you will need to repeat this step for each **Topic**. To **save** your changes, select the floppy-disk icon ( ) or to **discard** changes, select the cancel icon ( ).

When editing your SE it may be useful to expand the column for ease of use. To do this, hover your mouse over the line beside the area you wish to expand, these lines are shown below. Click the line and this will allow you to expand the area, making the text more visible. You will need to repeat this step for all topics and ensure you select save each time.

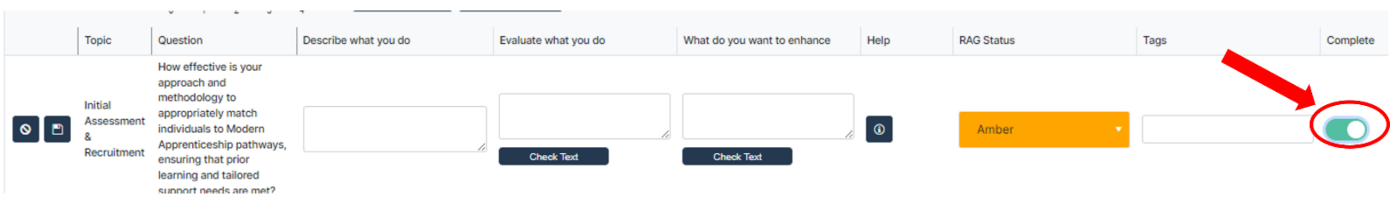
Please refer to section 2.2 to understand the self-evaluation template.



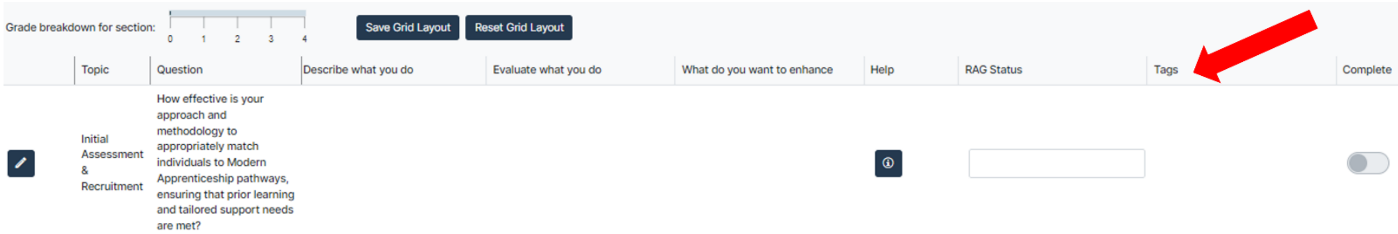
2. While editing content within ‘Evaluate what you do’ and ‘What do you want to enhance’ you will see a ‘Check Text’ icon. Selecting this icon will highlight all evaluative language throughout your response.



3. Once you feel this topic is fully updated, you should use the toggle ( ) to mark as complete. Follow this step for all topics to show SDS you have fully updated your SEQAP.



4. Please note, there is no expectation that you use the Tags function shown below.

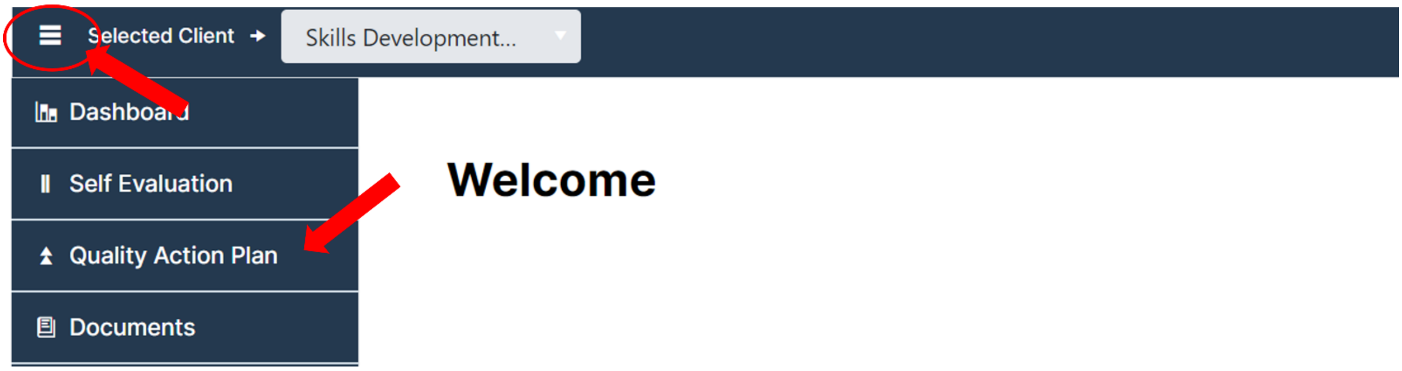


3.0 Developing and Maintaining Your Quality Action Plan

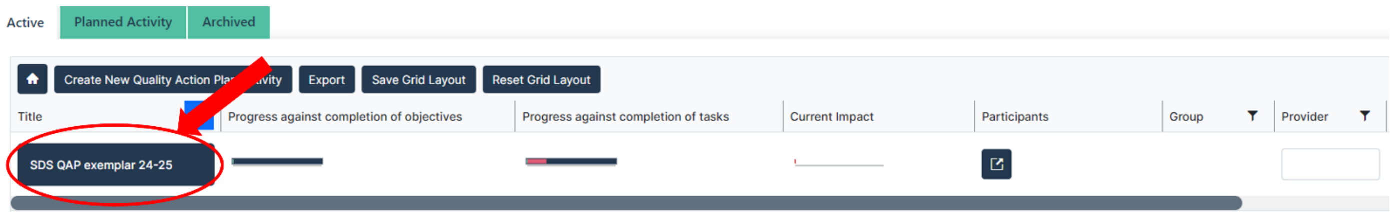
Following the completion of your self-evaluation, prioritise areas for improvement identified to focus on over the duration of your SDS contract. In addition, you **MUST** include area(s) for improvement related to topics graded as **RED** in your self-evaluation.

3.1 How to Access your Quality Action Plan

1. Open the drawer ( ) at the top left of screen and select Quality Action Plan.



2. To access, select the title of your Quality Action Plan. The title of your SE will be your organisations name followed by ‘QAP’.



3.2 Understanding your Quality Action Plan

An **Area for Improvement** is something identified that needs “fixed” or “enhanced” to improve what and how things are done to deliver better results e.g. our achievement rate for MA Framework is below SDS target.

The **Expected Impact** articulates the change and/or improvement expected as a result of implementing the **tasks**. There must be a direct relationship between the **Area for Improvement**, the **Tasks** and the **Expected Impact**. The Expected Impact should be **<u>measurable</u>**.

Tasks are action(s) that will be taken to address **Area for Improvement**. When delivered, the task will result in a change in what you deliver or how things are delivered e.g. service offer, processes, approaches, resources available which in turn results in improved performance.

Who to Action is the named user on mesma, within your organisation, with responsibility for coordinating taking the action forward. This is ideally an individual who will be responsible for ensuring that the action is progressed to conclusion and will liaise with any necessary stakeholders involved in the execution of the action, ensuring that progress is tracked, and updates are recorded.

The **Due Date** is when the **Expected Impact** is <u>likely</u> to be achieved.

The **Status** shows the position of progress towards achievement of the Expected Impact. The Status will show as ‘**Not Started’** until an Impact Note or Comment has been added. This will change the Status to ‘**In Progress’**. ‘**Overdue**’ will show when the current date is past the Due Date, and the Completion Date has not been added. The status will show as ‘**Complete**’ once a Completion Date has been added. The mesma system will issue reminder emails for any overdue Tasks or AFIs.

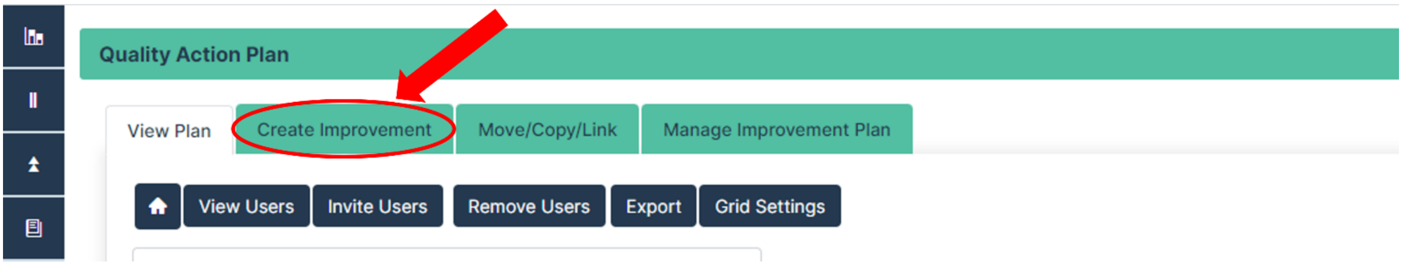
The **Completion Date** is when the **Expected Impact** is <u>actually</u> achieved.

The **Actual Impact** indicates the extent to which the Expected Impact has been achieved as a result of addressing the **area for improvement** and implementing the associated **Tasks**. The options are: ‘Met’, ‘Not Met’, ‘Partial’, or ‘Exceeded’.

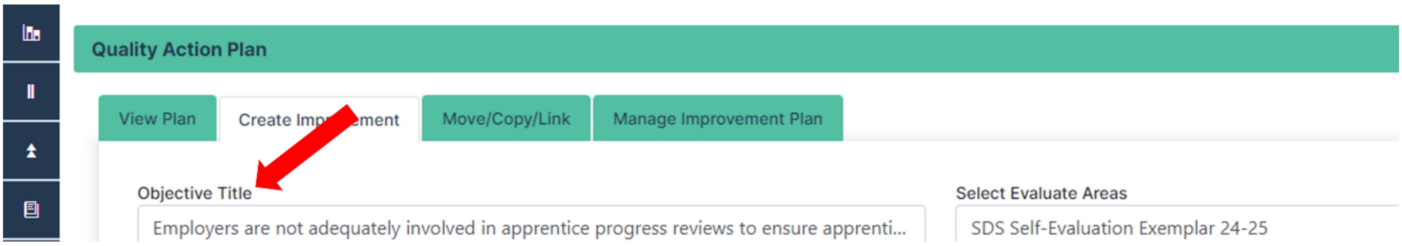
Impact Notes and **Comments** provide additional information that enables the Action Owner to articulate progress towards achievement of the **Expected Impact** and delivery of **Tasks** associated with the **Area for Improvement.** By leaving an Impact Note or Comment, the Status will be updated to ‘In Progress’.

3.3 How to Create an Area for Improvement

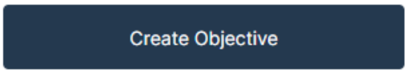
1. Select ‘Create an Improvement’.



2. Under ‘Objective Title’, articulate the Area for Improvement identified. Please refer to section 3.2 and 3.7 for guidance. Select the title of your Self-Evaluation under ‘Select Evaluate Area’ to link the Area for Improvement.

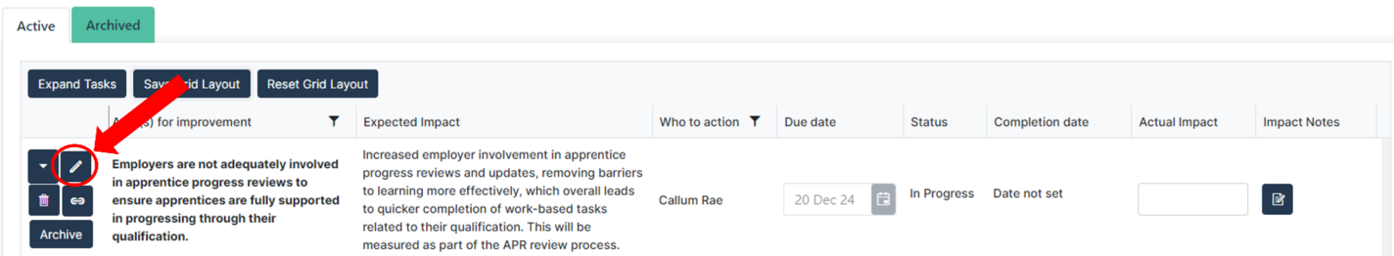


3. Select ‘Create Objective’ to confirm. You then must add Expected Impact, Tasks, Due Date, and the action owner. **Please refer to section 3.4**

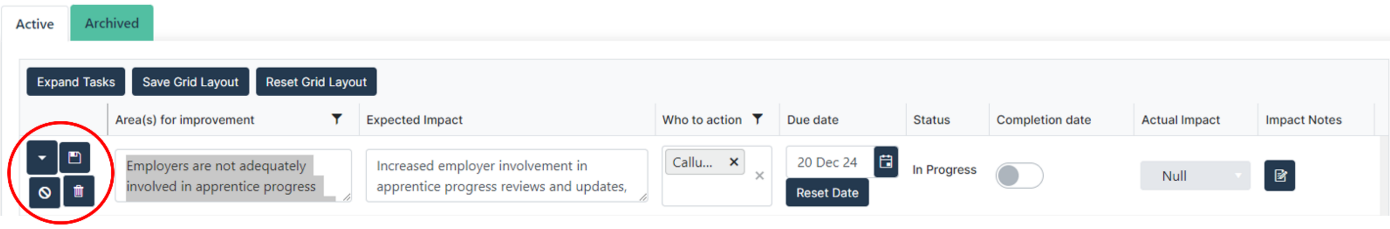


3.4 How to Edit your Quality Action Plan

1. Once you have accessed your Quality Action Plan, select the pencil icon ( ) to edit content related to the Area for Improvement.



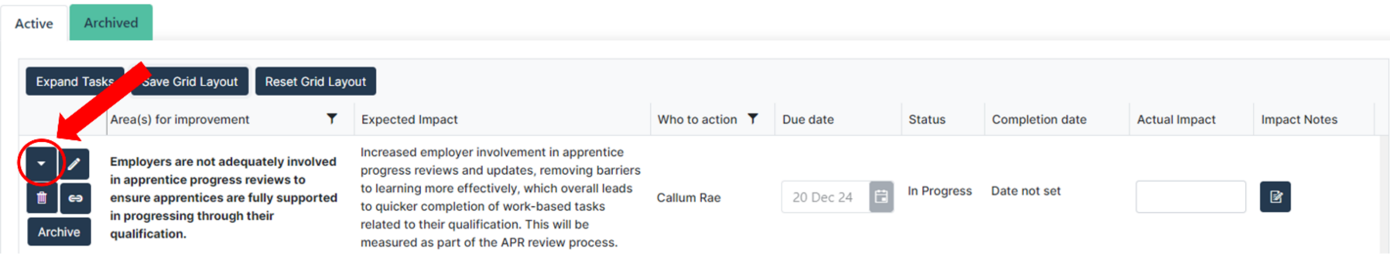
2. You will now be able to edit all aspects of your Quality Action Plan. To understand your Quality Action Plan better, **please refer to section 3.6 and 3.7**. To **save** your changes, select the floppy-disk icon () or to **discard** changes, select the cancel icon (). To **delete** the Area for Improvement, select the trash can icon ().



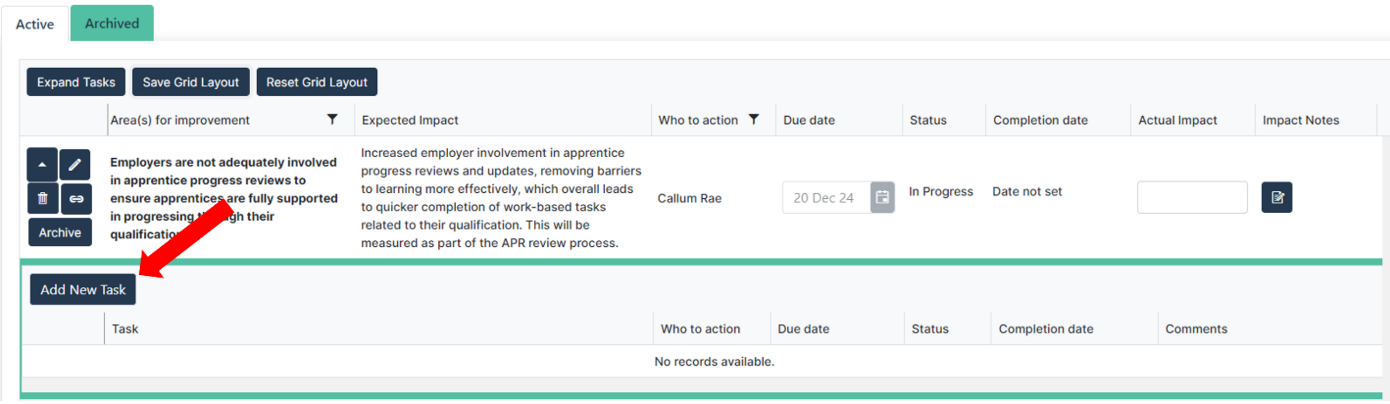
3.5 How to Add Tasks to your Quality Action Plan

Adding Tasks to your Area for Improvement is good practice, demonstrating the action that will be taken to drive change and achieve its Expected Impact.

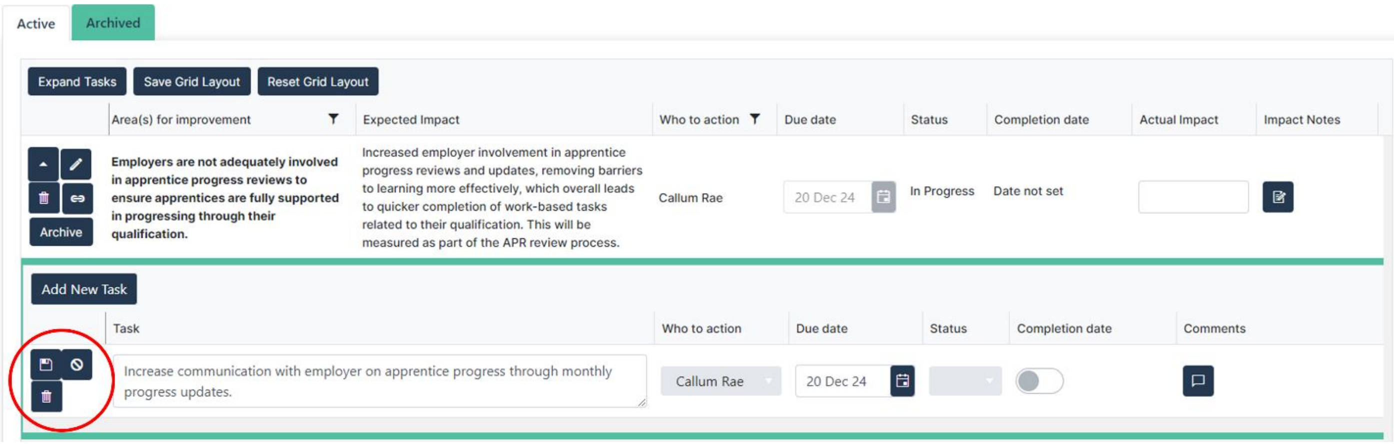
1. Expand the Area for Improvement by select the downward arrow icon ().



2. Select Add New Task.

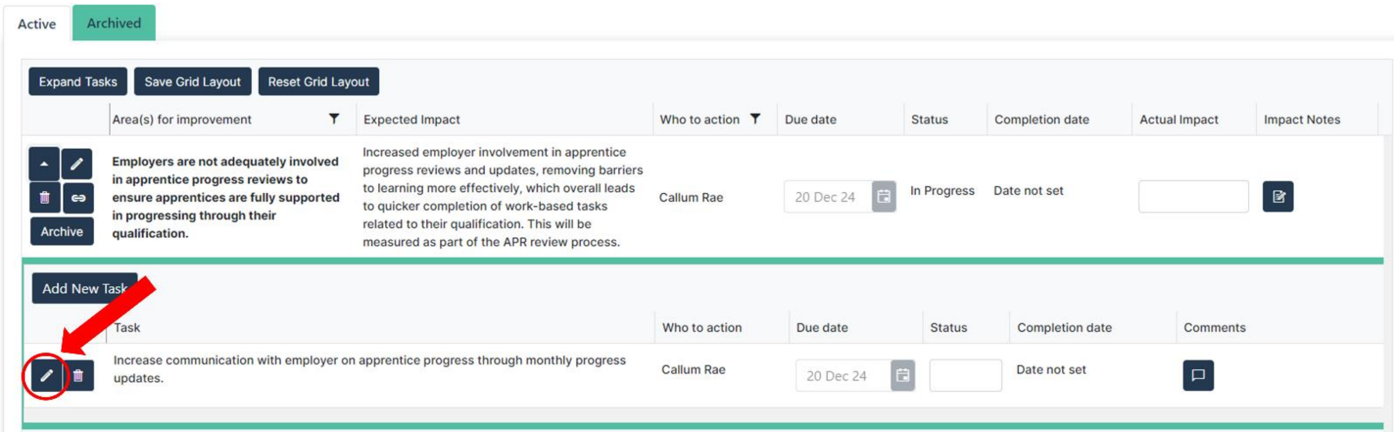


3. You will now be able to create your Tasks related to the Area for Improvement. To understand your Quality Action Plan better, **please refer to section 3.2 and 3.9**. To **save** your changes, select the floppy-disk icon ( ) or to **discard** changes, select the cancel icon ( ). To **delete** the Task, select the trash can icon ( ).



3.6 How to Edit Tasks to your Quality Action Plan

1. Once a Task has been created, select the pencil icon ( ) to edit content related to the Task. Multiple Tasks can be created for each Area for Improvement, and each task can be allocated to different users on mesma, which do not need to be the same user allocated to its Area for Improvement.

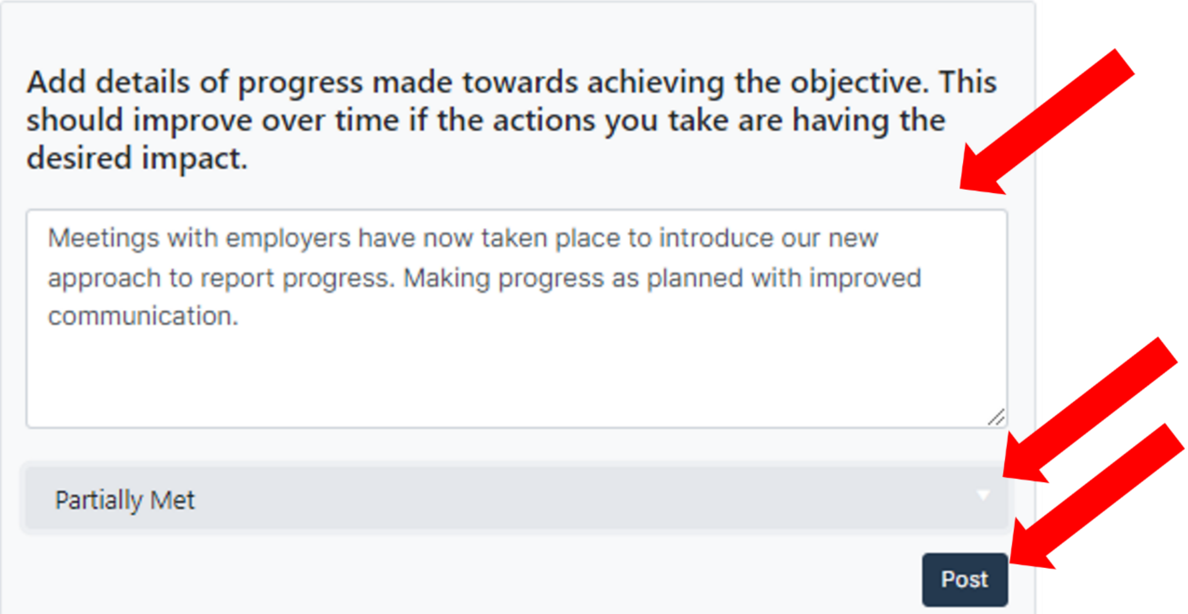


2. To change the status of the Task to complete, edit the Task and input the Completion Date. <u>Note:</u> Tasks must be completed before the Area for Improvement should be marked as complete.

3.7 How to Add Impact Notes

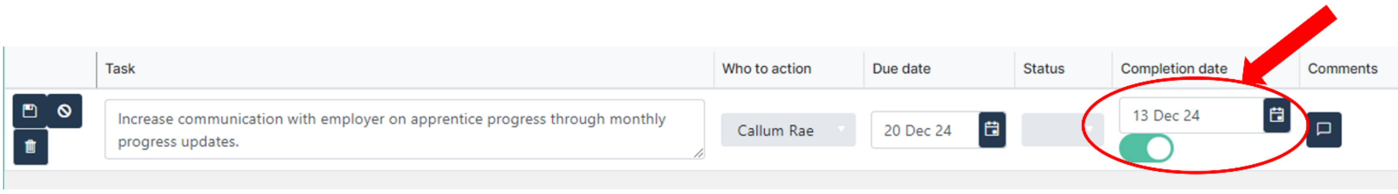
It is important, as part of your quarterly QAP update, to add details of progress made toward achieving the Area for Improvement. You can do this by leaving an Impact Note.

1. Under Impact Notes, select the notepad icon ( ) and a pop-up box will appear, prompting to add details of progress made towards addressing the Area for Improvement. Insert an update and select the current impact (not met, partially met, met or exceeded). To save Impact Note, select ‘Post’.

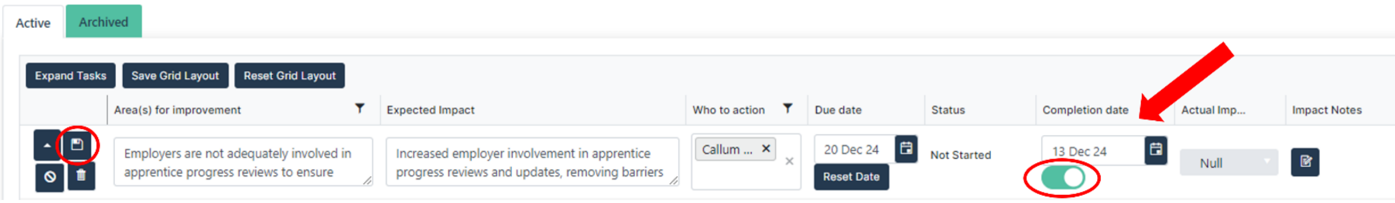


3.8 Completing Your Tasks and Area for Improvement

1. Once you have achieved your tasks, you can mark them as complete by selecting the pencil icon ( ) to edit, selecting the toggle ( ) and recording the completion date. To save these changes, select the floppy-disk icon ( ).



2. Areas for Improvement should only be marked as complete once its Expected Impact and associated Tasks have been achieved. You can also mark Areas for Improvement as complete by selecting the pencil icon ( ) to edit, selecting the toggle ( ) and recording the completion date. Select the Actual Impact (‘Met’, ‘Not Met’, ‘Partial’, or ‘Exceeded’). To save these changes, select the floppy-disk icon ( ).

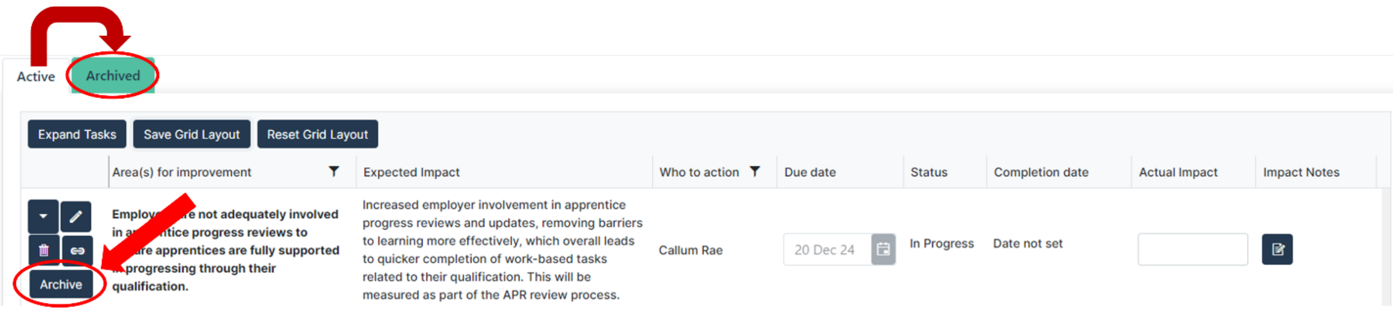


Note: a system warning message will appear when completing an Area for Improvement if associated tasks have not been completed.

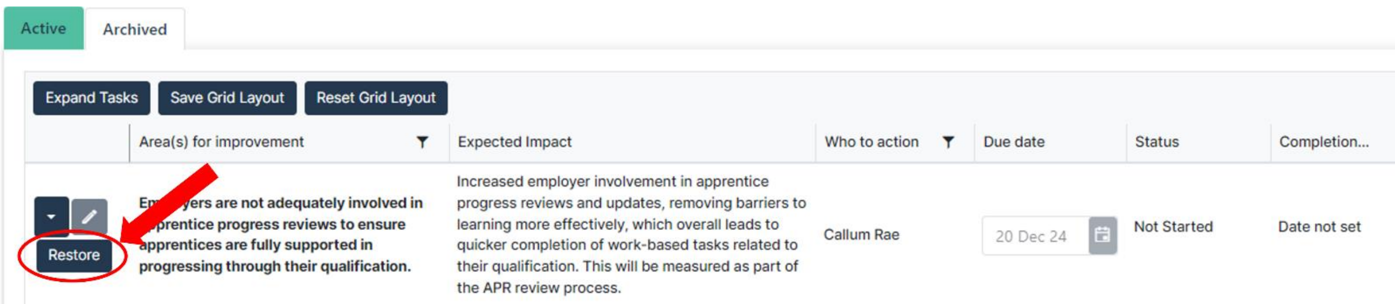
3.9 How to Archive an Area for Improvement

You may wish to archive an Area for Improvement once the Expected Impact has been achieved or in the circumstance where it is no longer a priority.

1. Select ‘Archive’, as shown below, which will move the Area for Improvement from the ‘Active’ section to the ‘Archived’ section.



2. To move the Area for Improvement back to the ‘Active’ section, select ‘Restore’.



3.10 SMART Action Planning

Quality Action Plans need to be **SMART** and it is important that you consider the following when you are defining your **Areas for Improvement** and **Tasks**.

Specific

Tasks detail exactly what you are going to do and relate to the Area for improvement and Expected Impact. The Area for Improvement clearly articulate what the problem is. It should also be clear who is responsible for addressing the Area for Improvement.

Measurable

Achievement of the Expected Impact can be evidenced e.g. improvement in an already published result or a result is available or feedback from customers is showing improvement. When using increase as part of the Expected Impact, you must quantify the expected increase – e.g. from X% to X% in the Expected Impact. This will enable you to visualise how improvement will be delivered, stay motivated and track progress.

Achievable

Expected Imapct and Tasks are something that can be achieved, ensuring plans (AFI/Tasks/Expected Impact) are agreed and attainable with the required support and resources in place.

Realistic

There is a reasonable expectation Tasks and the Expected Impact can be achieved. This means what you are setting out matters, aligns with organisational priorities and is within your influence This also relates to the Expected Impact.

Time-bound

There is a timescale which is achievable and realistic

Having created your Quality Action Plan, review the content and ask yourselves if a third party had to pick up and implement, would they understand the activities/steps they would need to take to achieve the expected impact.

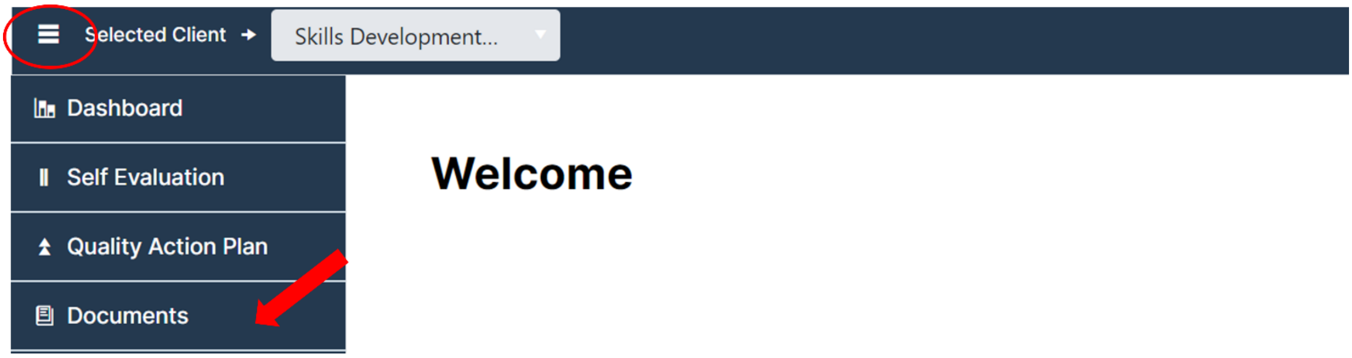
4.0 Your Documents

Unless asked, SDS ***do not*** require you to upload documents. This is your area to store and upload documents should you wish.

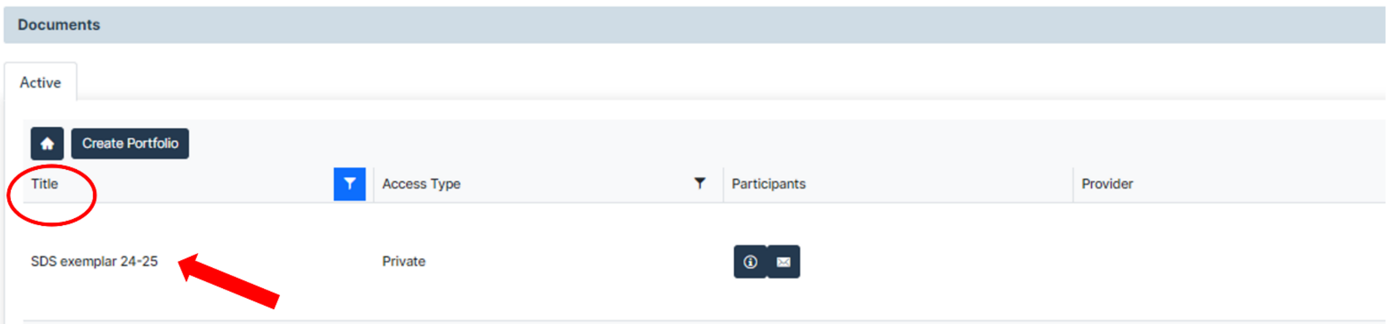
It is important to compare against previous year performance and benchmarks to understand your Continuous Improvement in Delivery & Performance. In the documents section, if you have completed a contracting year with SDS, you will find documents outlining your results in relation to SDS Key Performance Indictors.

4.1 How to Access your Documents

1. Open the drawer () at the top left of screen and select 'Documents'.



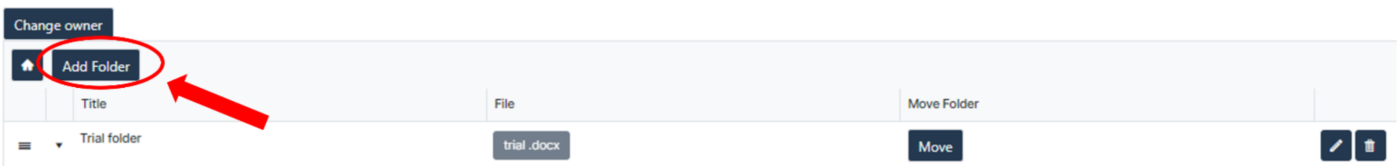
2. To access, select your organisations name underneath 'Title'.



4.2 How to Create a Folder

If you haven't already done so you will need to create a folder before adding documents. To do this, please complete the following instructions. You can create multiple folders and SDS may create folders for specific documents.

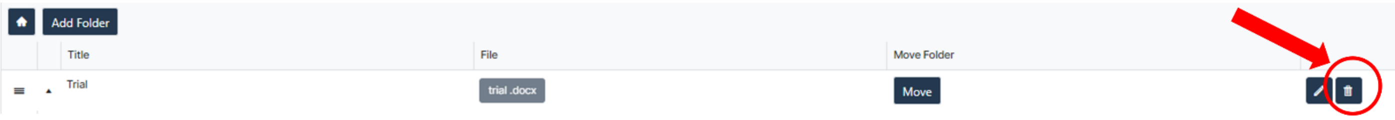
1. Once accessed the documents area, select 'Add Folder'.



2. Name the folder and select the save icon ().

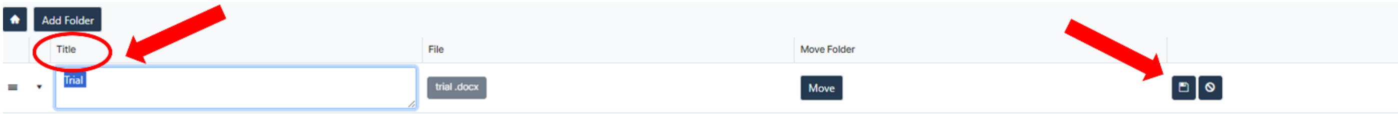
4.3 How to Delete a Folder

1. To delete a folder, select the trash icon ( ) beside the file and select OK on the following pop-up. Once deleted this is **not** recoverable on mesma.



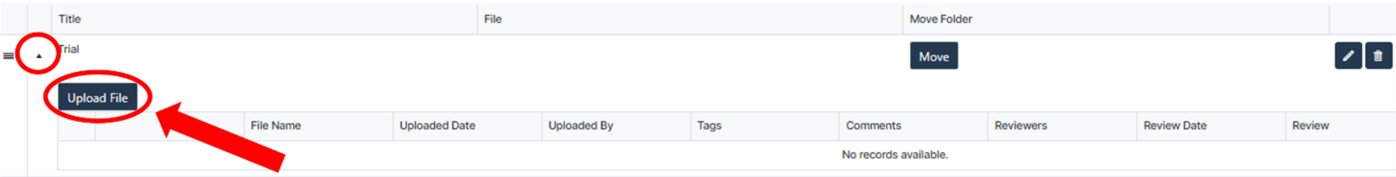
4.4 How to Rename a Folder

1. Select the pencil icon ( ), type in the new ‘Title’ for the folder and select the floppy disk icon ( ) to save.



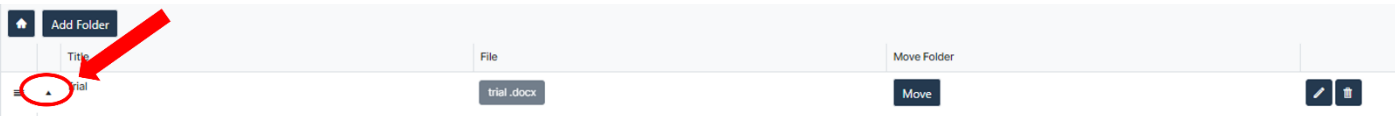
4.5 How to Add Documents to a Folder

1. Once you have created a folder, you will need to select the downwards facing arrow ( ) and select ‘Upload File’. This will take you to your documents within your device which you can upload. Please note some file types and sizes cannot be uploaded, for more information please click here.

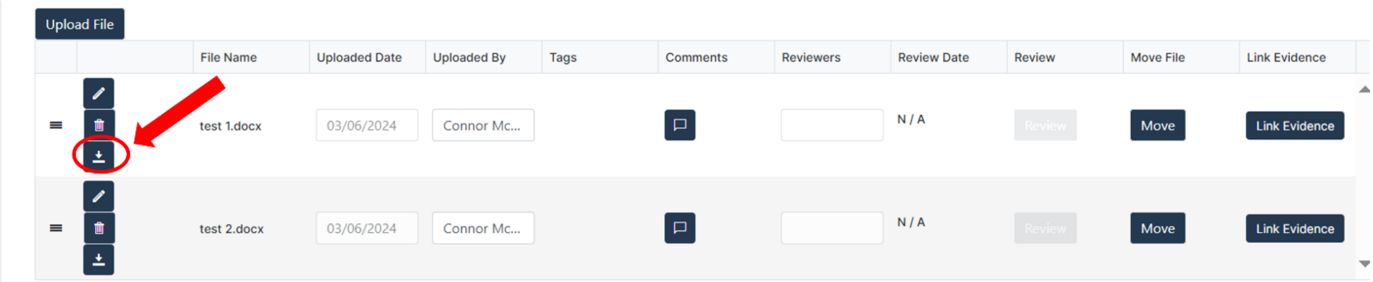


4.6 How to Access a Document

1. Once you have accessed your folder, select the downwards facing arrow ( ) to open the folder.

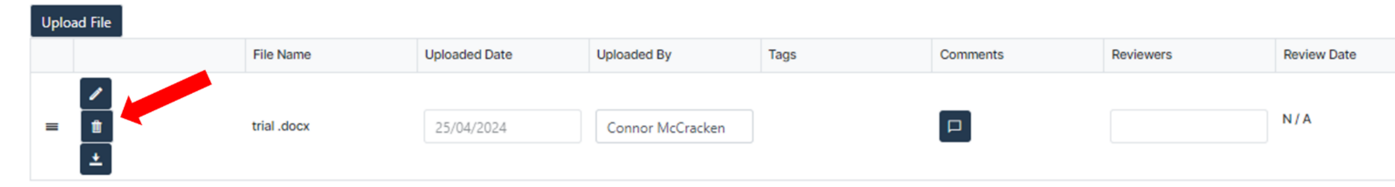


2. This will display all documents within this folder. Select the download( ) icon next to the document you wish to access.



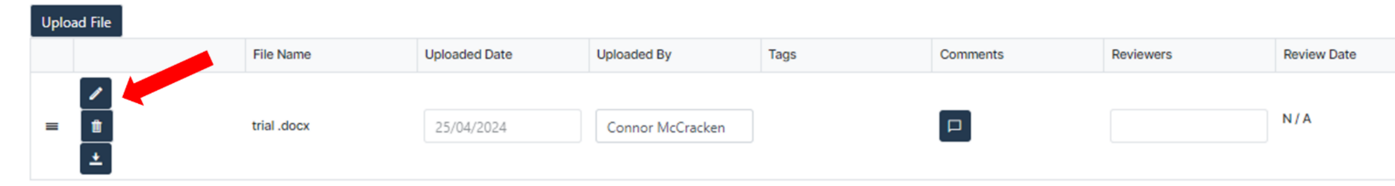
4.7 How to Delete a Document

3. To delete a document, select the trash icon ( ) beside the file and select Confirm Delete. Once deleted this is **not** recoverable on mesma.



4.8 How to Amend a Document

1. To amend, select the pencil icon( ) and then select the save icon ( ) once complete.



5.0 User Roles Explained

5.1 User roles

Owner

Users undertaking the role of the Owner will have the functionality of the Participant and Lead role and will also be able to archive areas for improvement in their quality action plan.

Lead

As a Lead you will be invited into the software by SDS or by your organisation's existing lead when roles are being transferred. In addition to the functionality of the participant role, you can also invite other users to contribute to your activity and determine the role others will have. Please refer to section 6.0 for more information.

Participant

As a Participant, you will be invited into the software by your Lead. You will be able to participate by being able to input your contributions. For example, if you have been invited to a self-evaluation or a quality action plan, you will be able to add, edit and delete content.

Reader

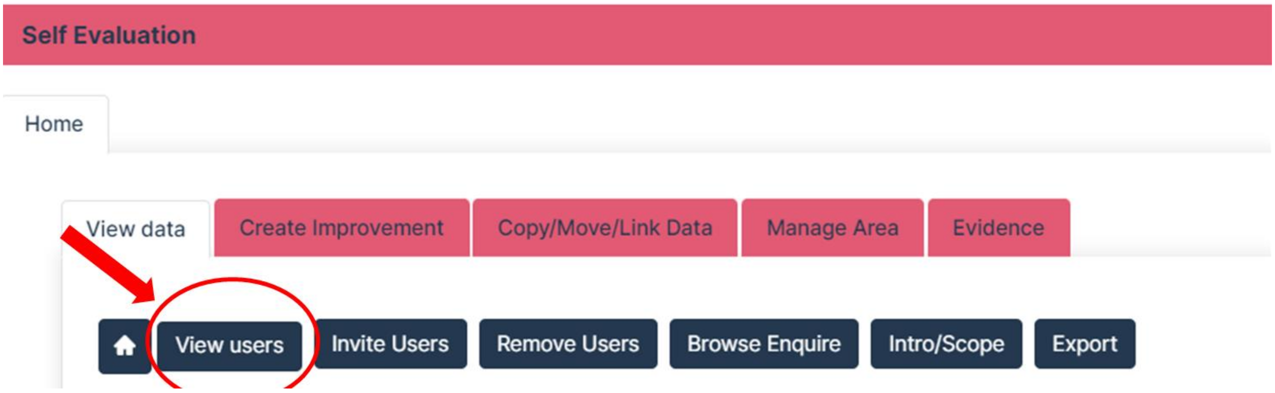
As a Reader, you have access to be able to read the contributions of others. You will not be able to make changes to any of the input.

6.0 Guidance for Lead Role - Managing your SEQAP

6.1 How to View Users

Users can have access to the SE and/or QAP and can have different levels of access. Therefore, you will have to repeat these steps for both areas[1].

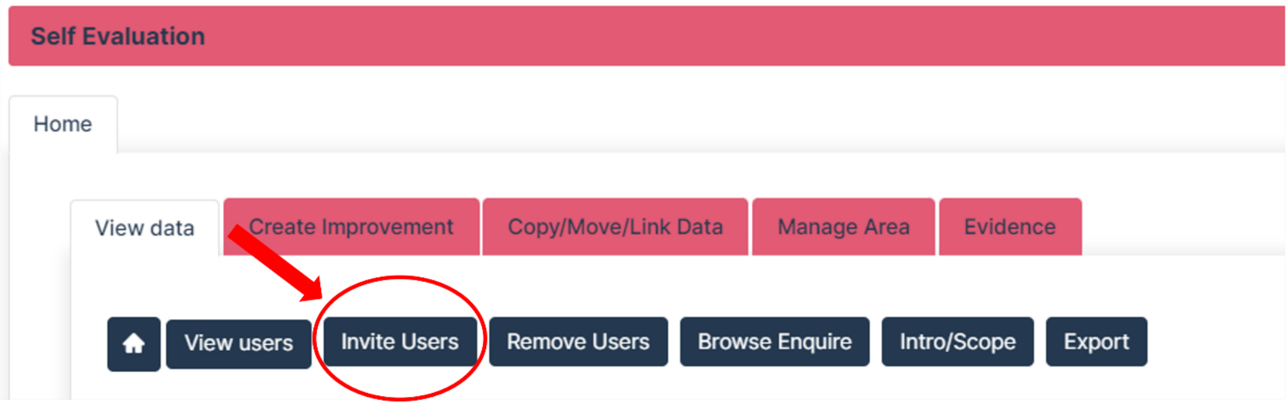
1. To view users within your SE and QAP, follow section 2.1 to access your SE and 3.1 for your QAP. From here select view users. This will take you to a page with a list of those with access and their role within this.



6.2 How to Add New Users

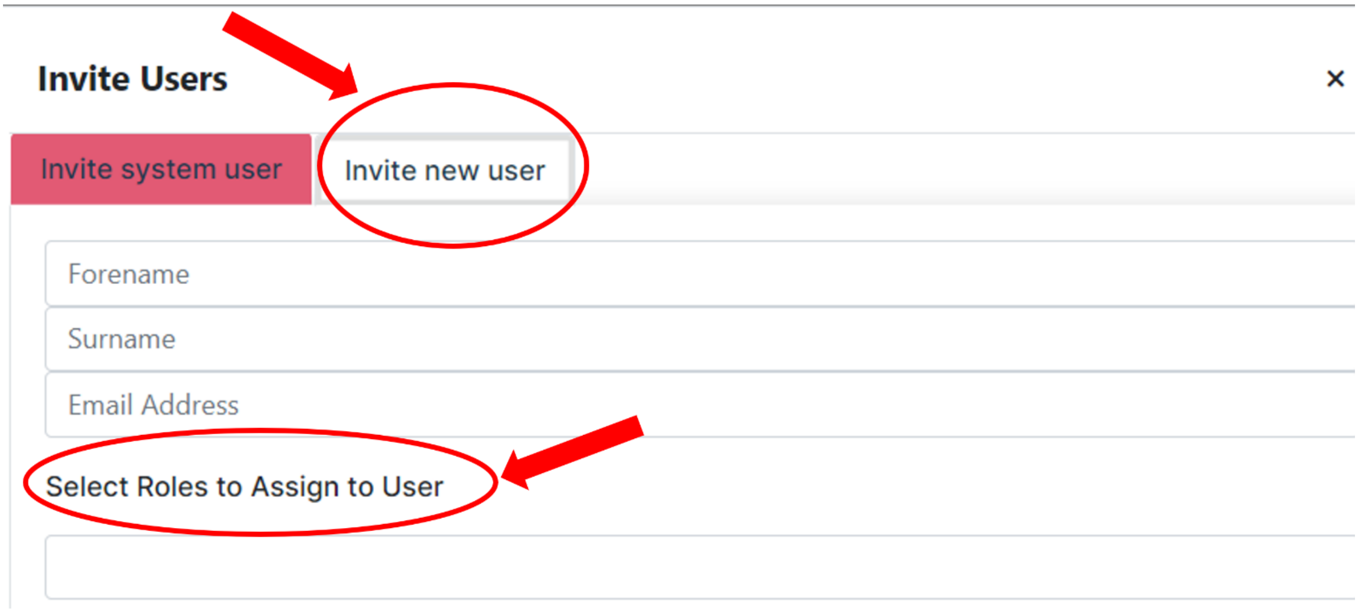
You will need to repeat these steps within your QAP.

1. From the main page select invite users.



[1] While the instructions show how to view, add, edit and remove users to the self-evaluation, please follow the same steps for the quality action plan.

2. Select invite new user and enter their name and email address and select their role within the document.

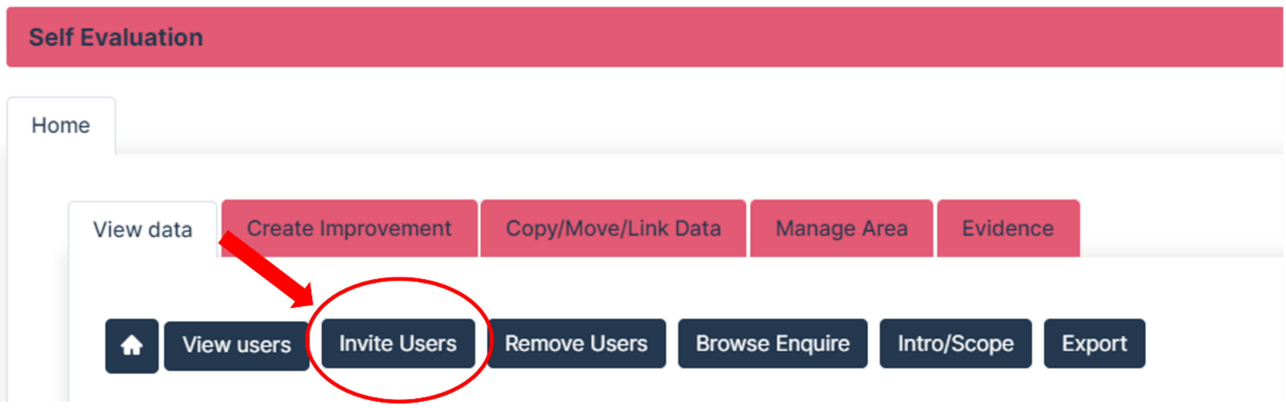


3. Select Add User to Area

6.3 How to Add Existing Users

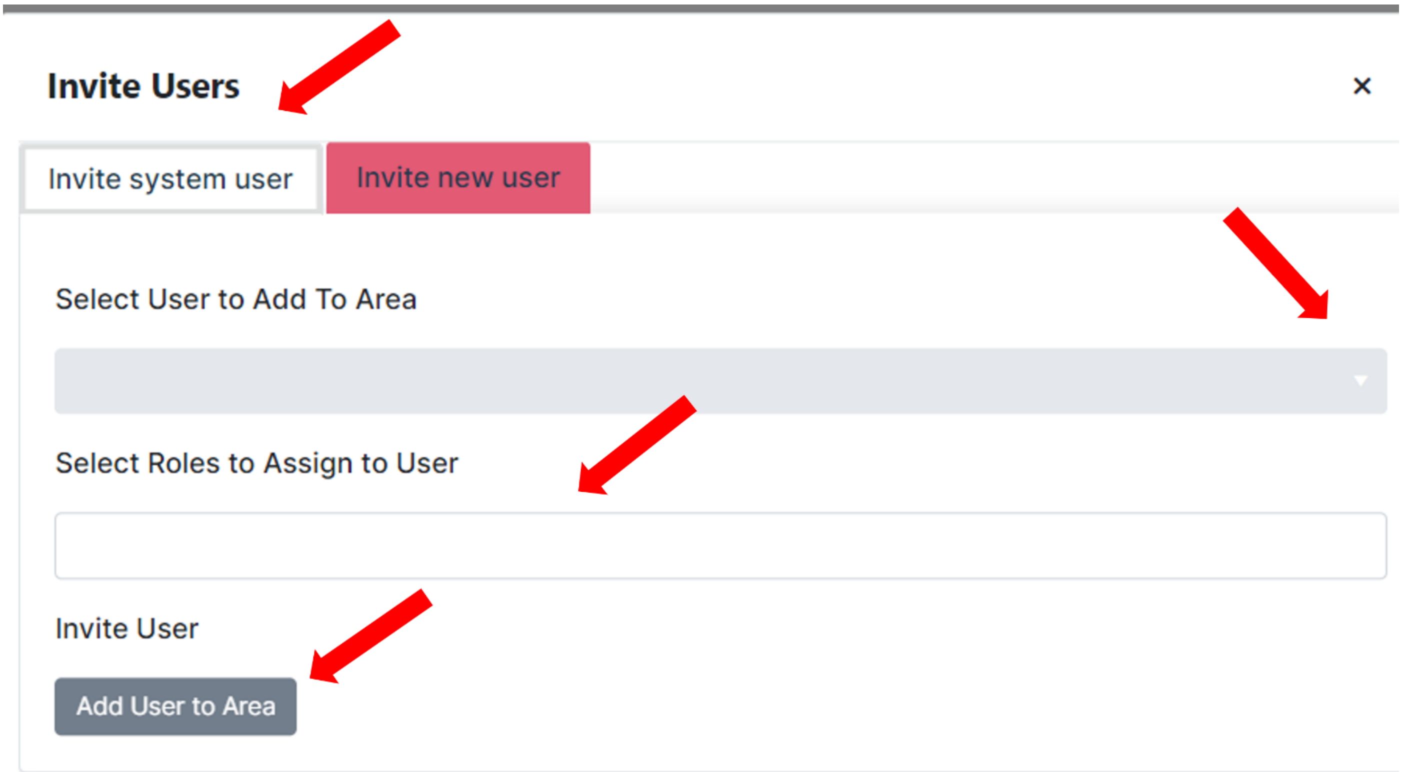
It is possible an existing user may only have access to one of the SE or QAP. If this is the case and you want to give them access to both, please follow the instructions below.

1. Access your SE or QAP. See section 2.1 and 3.1 on how to do this.
2. Select Invite users.



3. Select Invite system user.

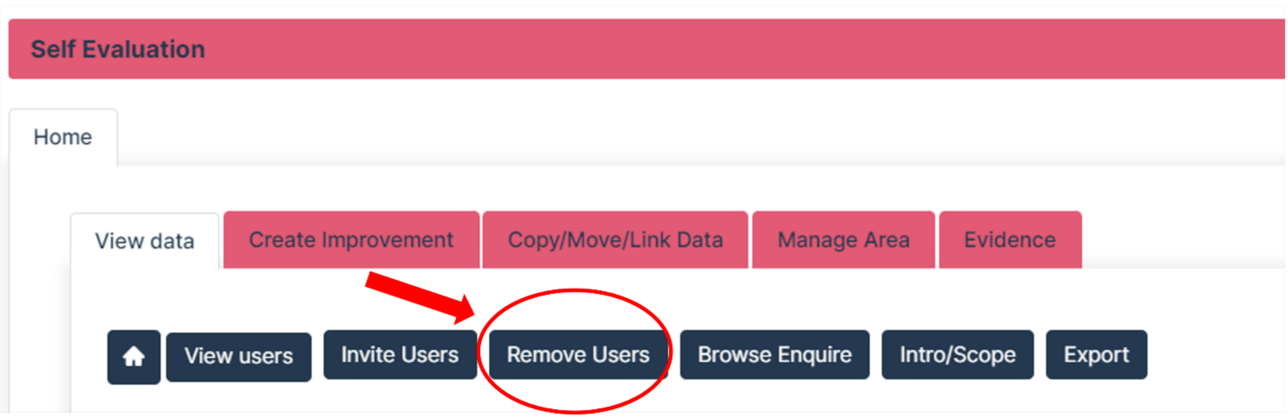
4. Select the downwards facing arrow ( ) next to Select User to Add to Area and select the individual you wish to add from the existing users.
5. Click on the Select Roles to Assign to User box and choose the role you wish to provide this individual.
6. Select Add User to Area



6.4 How to Remove Users

You will need to repeat these steps for both the SE and QAP area.

1. From the main page select remove users.

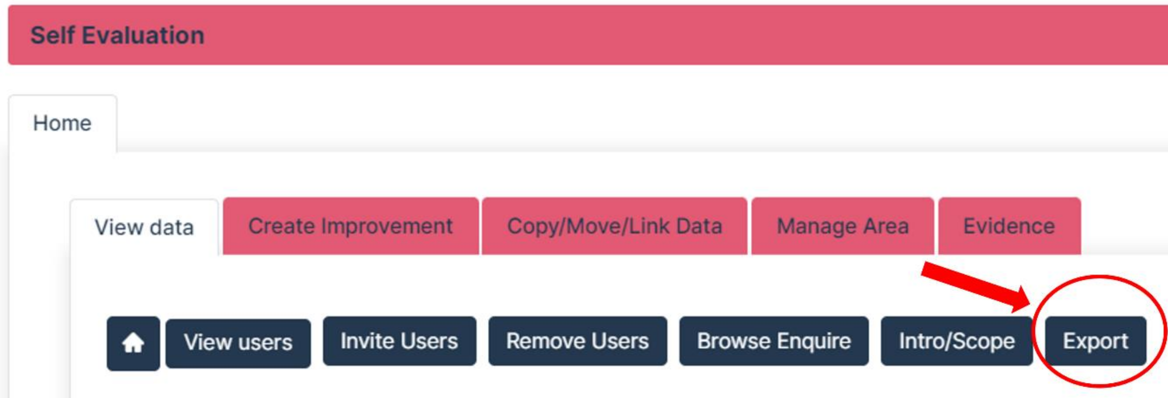


2. Select remove (Remove) next to the relevant user and select Confirm Remove.

6.5 How to Export your SE

You will need to repeat these steps for both the SE and QAP.

1. Access your self-evaluation.
2. From the main page select export.

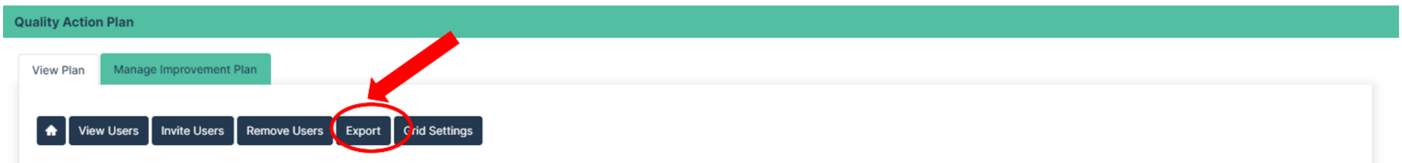


3. Use the toggle () button to select the fields on the SE/QAP you want to export.

4. You'll then be given options of which software to export too, select which application you'd prefer the document to export on. Generally, for the SE you'll be best using MS Word.

6.6 How to Export your QAP

1. Access your Quality Action Plan
2. From the main page select export.



3. All areas with show as selected for export, if you wish to remove this select the toggle() button.
4. You'll then be given options of which software to export too, select which application you'd prefer the document to export on. Generally, for the QAP you'll be best using MS Excel.

7.0 Accessing Mesma Support

There is a range of support, in addition to this guide, within the mesma platform.

You can access the mesma helpdesk by clicking here or selecting ‘Helpdesk’ at the top right of your screen. This will provide access to frequently read articles and a search bar to look for other materials.

In addition to this guide we have created bitesize videos to support you on the platform and these can be accessed here or alternatively by selecting Helpdesk, scrolling down to ‘Browse All Categories’ and clicking the SDS logo as seen below.

You can access the live chat function ( ) which you will see at the bottom right of your screen. This will connect you to a mesma representative who can support you in your query.