



Digital Tool Guidance

How to use the online evaluation tool to assess your careers provision against the Gatsby Benchmarks

Contents

IV
V
1
2
5
8
9
12
14
17
20
22
23
26

What are Compass and Tracker?



A digital tool to evaluate current careers provision against the eight Gatsby Benchmarks



An interactive planning tool that enables a school or college to plan to improve their provision



What are the benefits of Compass?



For your school or college?

- Evaluate careers and enterprise activity in around 30 minutes
- Compare their school/college to the 8 Gatsby Benchmarks for good career guidance
- Identify strengths and areas for improvement
- Get relevant online resources to help them improve on their score in relation to each benchmark, including dedicated resources to support careers provision for students with SEND

What are the benefits of Tracker?

For your school or college?

- Build and manage their annual plan for careers
 & enterprise activity, targeted to gaps
- Easily record events, classes and all careers activities in one place
- Access, download and share their plan in Word or Excel format with colleagues, Leadership Teams, OfSTED, governors, Enterprise Coordinators and Enterprise Advisers
- Evaluate the success of completed activities



Schools

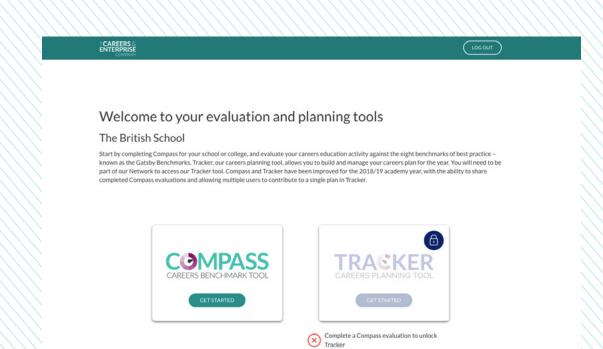


Getting started with Compass

Beginning with Compass evaluation against Gatsby benchmarks

Click on "GET STARTED" on the Compass logo which will take you to the Compass dashboard

Once on the Compass dashboard, click "GET STARTED" which will begin the questionnaire



Getting started with Compass

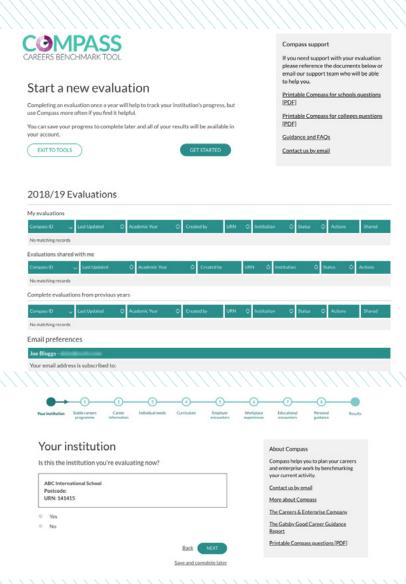
Beginning with Compass evaluation against Gatsby benchmarks

It will ask you to confirm your URN (your institutions unique reference number)

Please note: it is important you use the same URN used to create the account otherwise Tracker will not unlock

Selecting if you are you a College, School or Sixth form comes next

Please note: if you have a sixth form, select the school option



Getting started with Compass

Beginning with Compass evaluation against Gatsby benchmarks

5

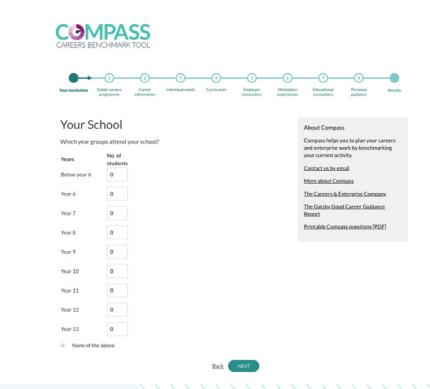
The question after the next will ask you how many students you have

Please note: image is schools and sixth form option



Please answer the questionnaire as clear and accurate as possible in order to have an accurate result against the Gatsby Benchmarks.

- What are Compass & Tracker
- Getting started with Compass
- Sharing Compass result
- View shared Compass result



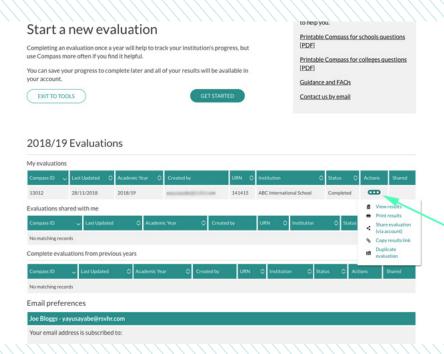
Sharing Compass result

There are two ways to share your Compass results with anyone with or without an account:

- 1. Share via account: Person you share with will need to have a Compass and Tracker account.
- 2. Share via link: Person you share with does not need to have an account, a link will be generated with your results and breakdown in which you can copy the link to them. The link is ideal for sharing information with the Headteacher, SLT members, Chair of Governors or your Enterprise Advisers (if in the network).

Go to your Compass Dashboard

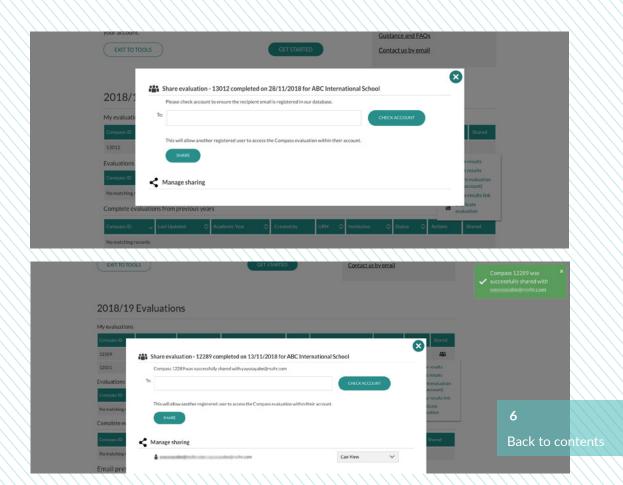
Click the action button, select "share via account"



Sharing Compass result

There are two ways to share your Compass results with anyone with or without an account:

- 1. Share via account: Person you share with will need to have a Compass and Tracker account.
- 2. Share via link: Person you share with does not need to have an account, a link will be generated with your results and breakdown in which you can copy the link to them. The link would be ideal for sharing information with the Head-teacher, SLT members, Chair of Governors or your Enterprise Advisers (if in the network).
 - Enter the account email of the person you wish to share the survey with, click "CHECK ACCOUNT" to verify they have a compass and Tracker account, if they do the message above should say valid account and then press "SHARE"
 - You should then see a successful green dialogue box appear in the top right corner



Sharing Compass result

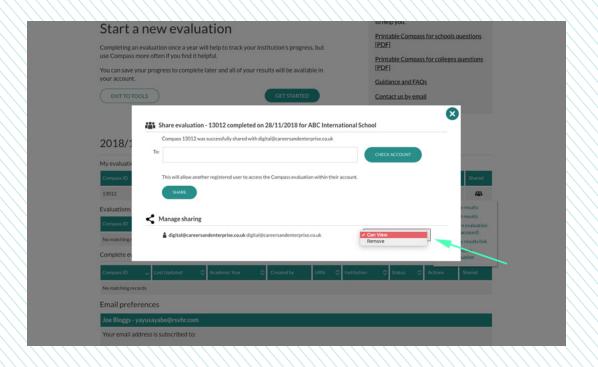
There are two ways to share your Compass results with anyone with or without an account:

- 1. Share via account: Person you share with will need to have a Compass and Tracker account.
- 2. Share via link: Person you share with does not need to have an account, a link will be generated with your results and breakdown in which you can copy the link to them. The link would be ideal for sharing information with the Head-teacher, SLT members, Chair of Governors or your Enterprise Advisers (if in the network).



You can also revoke your share permission by clicking on the action button and selecting "remove"

- What are Compass & Tracker
- Getting started with Tracker
- Copy current plan to next year
- Opening a shared Tracker plan
- Sharing Tracker plan



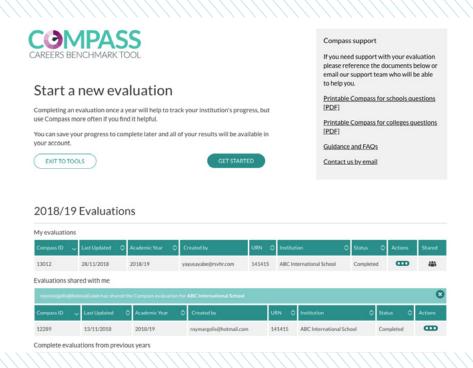
View shared Compass result

Viewing and printing shared Compass results

Once the Compass result has been shared to your account, go to your Compass dashboard

Scroll down to the sub heading "Evaluations shared with me" and click the action button

- What are Compass & Tracker
- Getting started with Compass
- Opening a shared Tracker plan
- Sharing Tracker plan
- Sharing Compass results

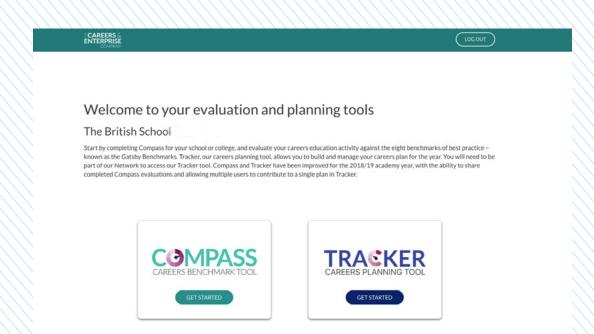


Getting started with Tracker

After Compass has been completed, Tracker allows you to plan activities based on the results of your survey.

Once you've completed a
Compass survey on your
account, Tracker will unlock
automatically

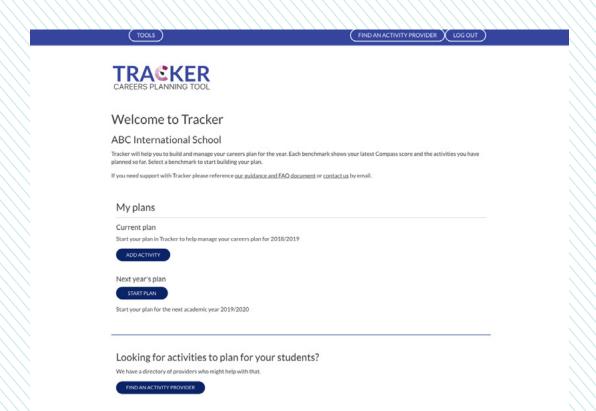
Click "GET STARTED" on the Tracker image which will take you to the dashboard



Getting started with Tracker

After Compass has been completed, Tracker allows you to plan activities based on the results of your survey.

Click "ADD ACTIVITY" to begin planning activities



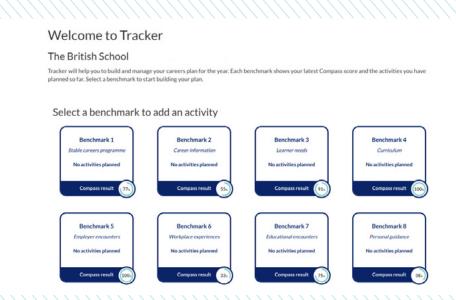
Getting started with Tracker

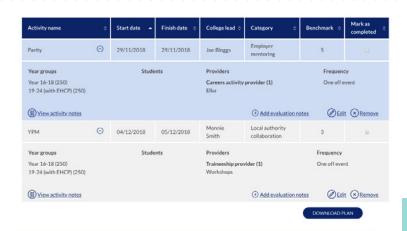
After Compass has been completed, Tracker allows you to plan activities based on the results of your survey.

As you see, the benchmark boxes indicate the percentages from your Compass questionnaire results. You can then plan activities on whichever benchmark box you click on

Once you've entered your Tracker plan details it should formulate a plan (please see example image)

- What are Compass & Tracker
- Getting started with Tracker
- Copy current plan to next year
- Opening a shared Tracker plan
- Sharing Tracker plan





Copy current plan to next year

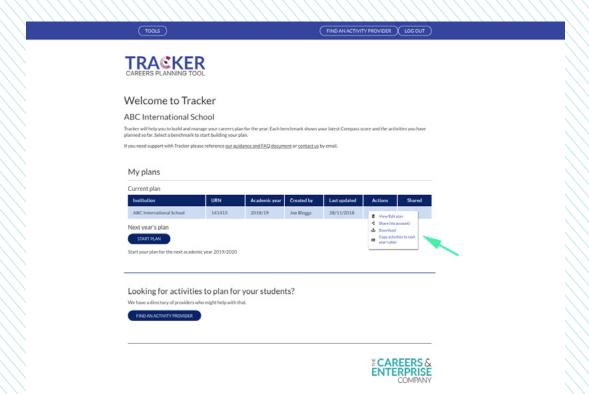
You can now copy your current Tracker plan to your next years plan.

Go to your Tracker dashboard and click the action button

Click on the action button and select "copy activities to next years plan"

A dialogue box will appear asking you to confirm, click "COPY ACTIVITIES"

Please note: this may take a few moments if you have a lot of activities

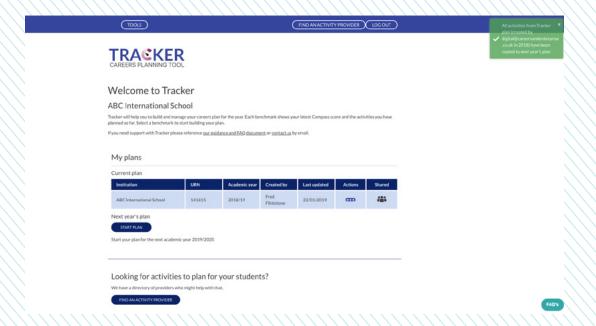


Copy current plan to next year

You can now copy your current Tracker plan to your next years plan.

You will then get a green successful box in the top right corner indicating the migration has been successful

- What are Compass & Tracker
- Getting started with Tracker
- Copy current plan to next year
- Sharing Tracker plan
- Opening a shared Tracker plan

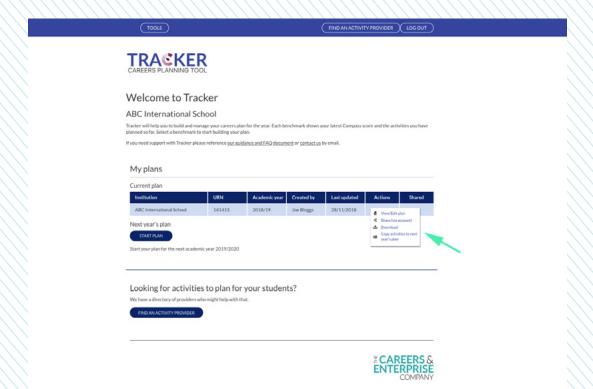


Sharing Tracker plan

You can now share your Tracker plan with another user who has a Tracker & Compass account. If you are in our network, please share your plan with your Enterprise Coordinator.

Go to your Tracker dashboard and click the "Action" button

Select "share via account" which will open a dialogue box (please see example on next page)



Sharing Tracker plan

You can now share your Tracker plan with another user who has a Tracker & Compass account. If you are in our network, please share your plan with your Enterprise Coordinator.

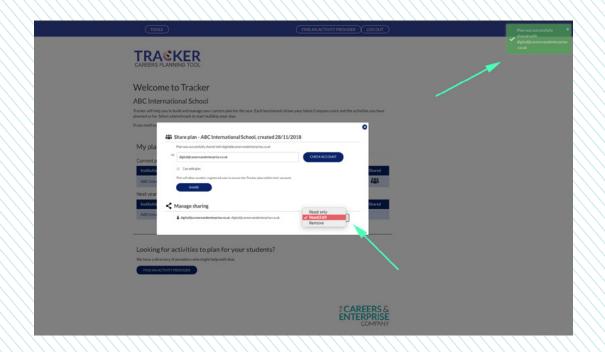
Enter email for the account of the person you wish to share with and select "check account"

Please note: People you share via account with must have a Compass and Tracker account

You also have the option to give them different permissions:

- read only
- •read/edit

Once you've successfully shared with them, you should see a green box in the top right corner indicating it has been successful

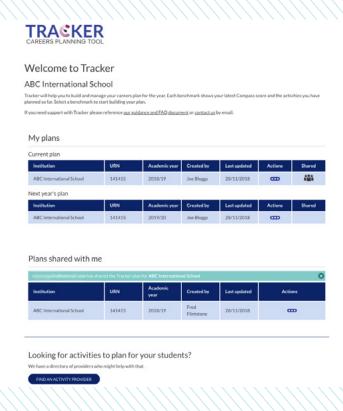


Sharing Tracker plan

You can now share your Tracker plan with another user who has a Tracker & Compass account. If you are in our network, please share your plan with your Enterprise Coordinator.

On your Tracker dashboard you will see an icon that indicates you have shared your plans

- What are Compass & Tracker
- Getting started with Tracker
- Copy current plan to next year
- Sharing Tracker plan
- Opening a shared Tracker plan

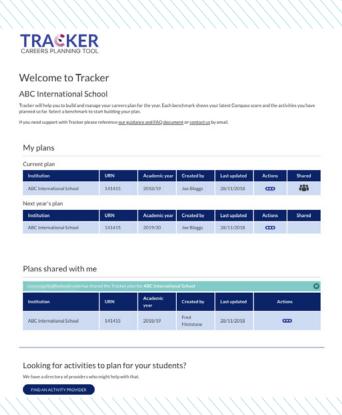


Opening a shared Tracker plan

How to view/edit a Tracker plan that has been shared with you.

Go to your Tracker dashboard

The "Plans shared with me" sub heading will have all the plans shared to you via account below



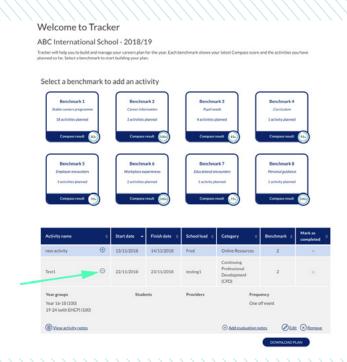
Opening a shared Tracker plan

How to view/edit a Tracker plan that has been shared with you.

Click the action button to view, edit, download plan or copy plan to current year (depending on the permissions given to you by sharer)



- "View" will allow you to see the sharers plan, you will not be able to edit
- "Edit" will allow you to view and make changes to the plan details, delete and complete tasks



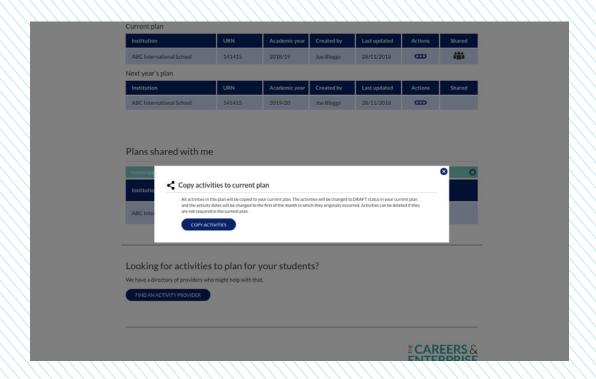
Opening a shared Tracker plan

How to view/edit a Tracker plan that has been shared with you.



"Copy plan to current year" will allow you to migrate the shared plan to your personal plan on your account

- What are Compass & Tracker
- Getting started with Tracker
- Copy current plan to next year
- Opening a shared Tracker plan
- Sharing Compass results

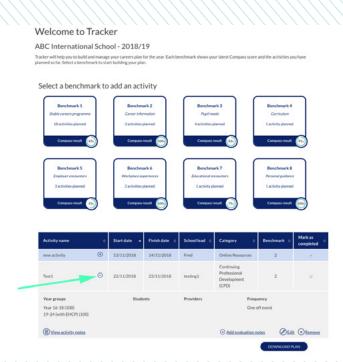


Download/Print Tracker plan

Viewing and printing shared Compass results.

Click on the Tracker action button and select "view/edit plan"

This should open your Tracker plan, scroll to the bottom and click on "DOWNLOAD PLAN" which will open in a Microsoft excel spreadsheet

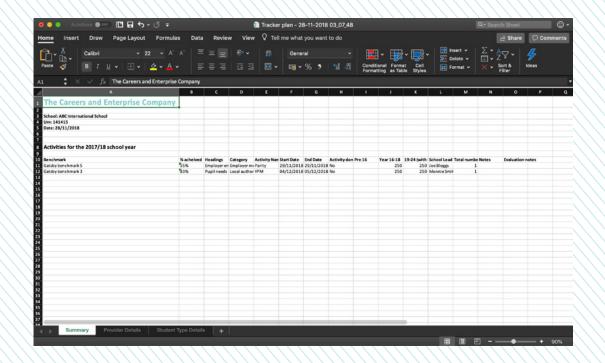


Download/Print Tracker plan

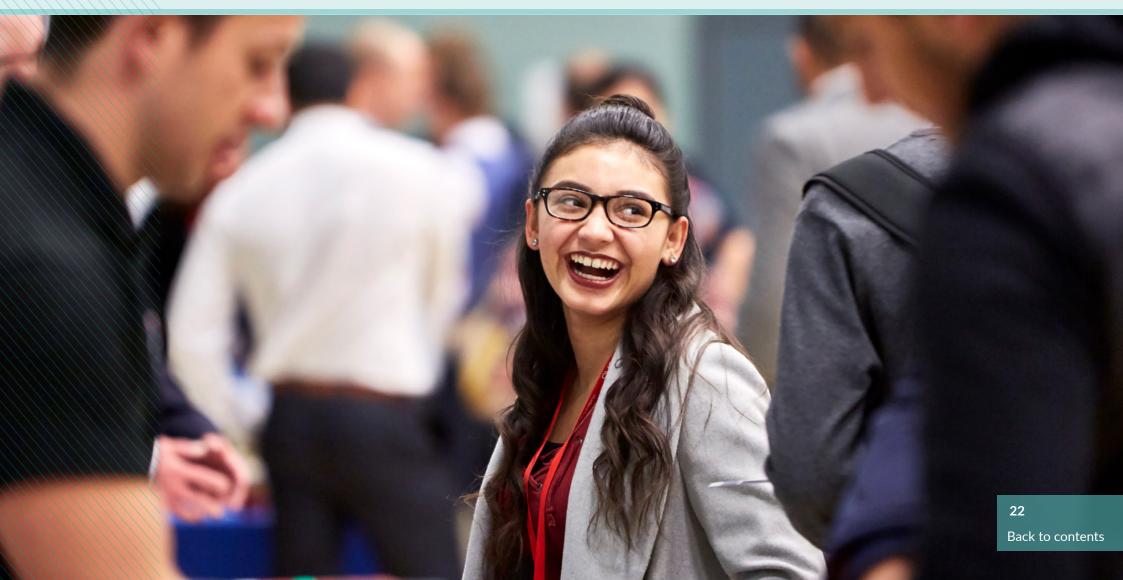
Viewing and printing shared Compass results.



- What are Compass & Tracker
- Getting started with Tracker
- Copy current plan to next year
- Opening a shared Tracker plan
- Sharing Compass results



Colleges

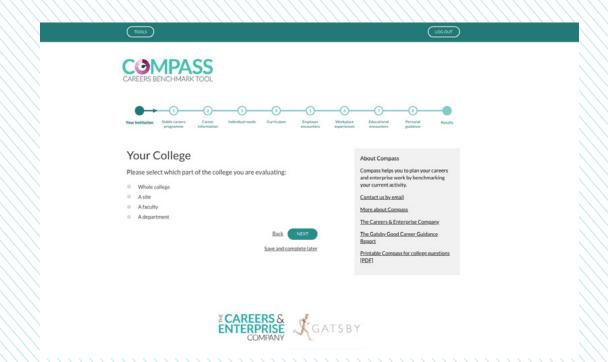


Compass for Colleges

Many colleges are now part of a merged group and will be operating separately or will come under one URN. There are also colleges who may have multiple sites and faculties who wish to complete an evaluation for each site/faculty. Once a user has identified the URN, the college tool now has the functionality to enable users to complete an evaluation for whole colleges, site, faculty or department.

Each one of those evaluations will be a separate evaluation in the list.

Option to select "evaluate as a whole College, site, faculty or department"

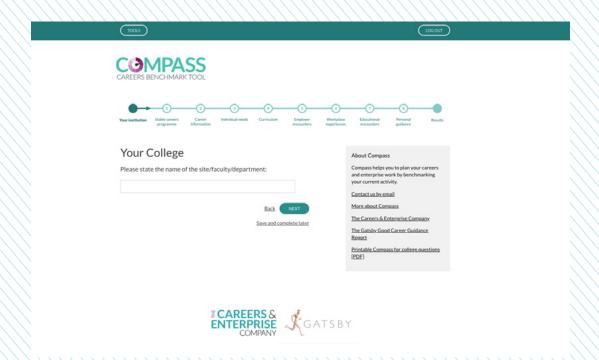


Compass for Colleges

Many colleges are now part of a merged group and will be operating separately or will come under one URN. There are also colleges who may have multiple sites and faculties who wish to complete an evaluation for each site/faculty. Once a user has identified the URN, the college tool now has the functionality to enable users to complete an evaluation for whole colleges, site, faculty or department.

Each one of those evaluations will be a separate evaluation in the list.

If you don't select Whole College the next question will let you specify



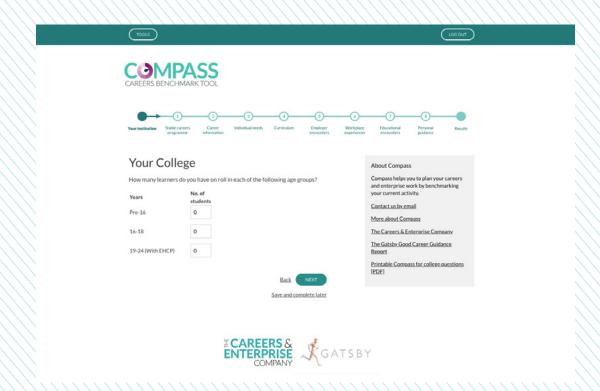
Compass for Colleges

Many colleges are now part of a merged group and will be operating separately or will come under one URN. There are also colleges who may have multiple sites and faculties who wish to complete an evaluation for each site/faculty. Once a user has identified the URN, the college tool now has the functionality to enable users to complete an evaluation for whole colleges, site, faculty or department.

Each one of those evaluations will be a separate evaluation in the list.

Followed by the number of students and so on

- What are Compass & Tracker
- Getting started with Compass
- Sharing Compass result
- View shared Compass result



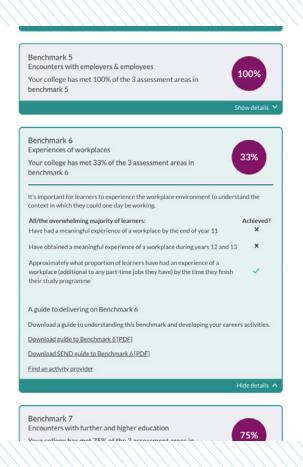
Viewing Compass results

Once you've completed the Compass questionnaire it will produce your results which is marked against the Gatsby benchmarks.

Once you've completed the last question you will be prompted to view results

Please note: the results below are based on College benchmarks, text breakdown will be different for schools

- What are Compass & Tracker
- Getting started with Compass
- Sharing Compass result
- View shared Compass result





The Careers & Enterprise Company 2-7 Clerkenwell Green Clerkenwell London EC1R ODE