Preliminary Review, Self-Study and Development Planning within the new evaluation process using the 2020 Programme Standards and Practices.

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Dear all,

I have copied some information to support the new evaluation process, using the 2020 standards and practices. I hope you find the information provided useful in your planning. It is vitally important that schools with scheduled evaluation visits for 2022, 2023 or 2024, start planning. The required Programme Development Plan process needs substantial planning. Schools should access supporting materials in the Programme Resource Center (under Implementation) and on the IB website @ https://ibo.org/professional-development/free-learning/free-online-pd-resources/

Please ensure that staff use:

- MyIB and the Programme Resource Centre
- Access support materials via the IB website
- Weekly Australasian portfolio Zoom for questions
- Utilise the opportunity for a school Zoom call with me
- Have access to my contact details for questions/concerns
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The IB has implemented a bold initiative to reinvigorate the evaluation process. More than ever before, schools have an opportunity to determine an evaluation structure that best supports their context and strategic planning. There are some significant differences between the previous process, and the new evaluation model. It is very important that schools with evaluations in 2022, 2023 and 2024 start planning for the specific requirements of the new evaluation process and the bespoke nature of Programme Development Planning. Below is an outline, supporting planning for your next evaluation. I hope it is of some support.

A. **Differences and similarities between old and new evaluation processes:**

	Familiar /included in old evaluation process (2016 guide)	**New/different**

Preliminary Review	- Submission of documentation that show schools implement with fidelity	- 4 months prior to evaluation visit/self-study submission and includes feedback report and follow up if requirements should not be in place
		
		- Appendix 1 shows expectations linked to those documents (right column of table)
		
		- documents in addition to what was required in old process for all programmes:
		
		a) parent/legal guardian complaints procedure
		b) school strategy
		c) job description head of school or designee(s)
		   new for DP: curriculum documentation
		   new for PYP: inclusion policy, academic integrity policy
		   new for MYP: Student reflections on service as action

Self-Assessment	- Reflective process involving all stakeholders - based on evidence/data - school self-assesses whether requirements are in place – school self-evaluate level of implementation of IB practices - school reflects on achievements during the period under review - school identifies areas for further development	- based on 2020 IB Programme Standards and Practices - one self-study questionnaire for all programmes supports whole school approach for schools with more than one IB programme included in the evaluation. - school is no longer required to submit an action plan to capture action resulting from self-study. Action plan may be kept and submitted as evidence, reflecting how recommendations from the previous report have been addressed over the last evaluation cycle. The action plan template may also be used to address matters raised at the Preliminary Review. This is backward looking reflection. The forward look component of previous action planning is now Programme Development Planning. Instead of identifying points of focus on an action plan, the school will use insights to inform programme development planning which starts right after evaluation or authorization.

Programme Development Plan	- Not included -	The school: - shows how programme development was planned and implemented to have a positive impact for students. - shares the results of the analysis undertaken to determine to what extent the intended impact was achieved. - shares the reflection and lessons learned from their efforts and describes how these lessons will be applied in further or future efforts to develop the programme. The IB provides feedback at a visit (or DP reading) and in the report regarding planning, evidencing, analyzing and reflection of evidence in the way that the school develops the programme in its context.
Evaluation visit	- Peer visits by a team of IB trained educators with programme(s) expertise - includes meetings with leadership team, staff, students, parents	- Focus on school development - Includes meetings with framework committees and meetings to reflect upon programme development planning - Visiting team provides feedback in the conclusion meeting - school leadership supported by IB visiting team report conclusions to school community in school community meeting at the end of the visit
Evaluation report	Report based on submitted documents and findings from the visit (if applicable)	Organized in Sections: A: School Context B: Programme Strengths C: Requirements not in place D: Development of IB standards E: Feedback on programme development planning, analysis and reflection F: Opportunities for programme development G: Conclusion of the IB evaluation team

B.   Preliminary Review

The preliminary review happens 4 months before the visit. It is a compliance test to see if your school follows the IB regulations. In the Appendix 1, you can find the list of all the documents that have to be uploaded. This document lists the documentation that has to be uploaded by any IB World School (under *For all programmes*) and then the document dedicated to the programme(s) you teach. It mentions the requirement or the rule that each document will evidence, and lists the expectations that must be visible in your documentation:

Item	Rule or **requirement** or specification	==Expectation(s)==
Compliance with Rules for IB World Schools		
School and programme profile	==Rules—Article 5.14:== Schools must inform the IB of any major changes in their governance, organizational structure, and/or location (including damage to, relocation of or major renovations of school premises). Leadership 1.2: Leadership and governance understand all IB rules, regulations and guidelines, and have put in place structures and processes to ensure compliance. (0201-01-0200)	The school has submitted the school and programme profile
Legal entity and licensure documentation	==Rules—Article 15.2:== A school must be and remain duly registered as a legal entity under local law—either for profit or not-for-profit, privately or publicly funded. ==Article 15.3:== A school must have and maintain the required licensure or accreditation by the local authorities and/or, if applicable, independent recognized accreditation agencies, indicating that it is licensed/accredited to provide educational services to students of the ages served by the programme(s) for which the school is authorized.	The school has submitted the legal entity and licensure documentation. The school is duly registered as a legal entity under local law. The school has the required licensure or accreditation by the local authorities and/or, if applicable, independent accreditation agencies, indicating that it is licensed/accredited to provide educational services to students of the ages served by the programme(s) for which the school is authorized.
Statement of acceptance	Leadership 1.2: Leadership and governance understand all IB rules, regulations and guidelines, and have	The school has submitted the signed statement of acceptance.

We have created [templates](#) to support you with your documentation. All documentation needs to be uploaded to [IB Concierge](#) at the deadline provided by School Delivery (cf: Chapter 1 on timeline). Two weeks later, you will receive an email saying that the Preliminary Review Report is available on *IB Concierge* and you can download it here. If there are no pMTBA (preliminary matters to be addressed), no action is required, and this step is over. If there are pMTBA, your school has two weeks to answer them. Two options are then possible: - if you can amend the mentioned document during the two weeks, please amend the document and upload it; - if you need more than 2 weeks to answer the pMTBA, you have to create an action plan (it can be found in the [templates](#)) explaining how your school will answer the pMTBA by the visit itself; then please upload this action plan.

C. Self-Study Questionnaire

The [self-study questionnaire](#) is a key document in the evaluation process: it gives the possibility to your school to evaluate itself, assess each practice and plan your future development. This is why all stakeholder have to be part of the self-study. Schools are allowed to organize their self-study as they want, but we recommend having 4 committees reflecting the format of our *Programme Standards and Practices*:
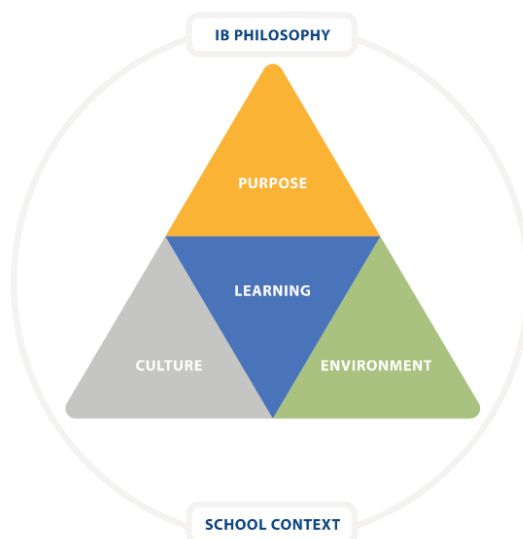
Schools are invited to collect feedback from students and parents by including them in committees or by creating surveys (schools are free to choose the ways that work in their own contexts). The self-study questionnaire is organized like this:

a) You assess each practice for each programme you teach:

Purpose 1: The governing body and school leaders articulate a purpose for learning that aligns with the IB's philosophy and mission. (0101-01)
Purpose 1.1: The school develops a mission, vision and strategy that reflect the IB mission and philosophy. (0101-01-0100)

Purpose 1.2: The school develops a mission, philosophy and/or strategy that includes a holistic approach to education that goes beyond academic development and encourages awareness beyond the individual and the immediate community. (0101-01-0200)

	Requirement(s) in place Y/N	Developing	Developed	Highly developed
PYP				
MYP				
DP				
CP				

In the second column, you have to assess if the practice is in place or not:

- If the practice is in place, add "Y" for *Yes* in the second column then tick the level of development your school is at for this practice by ticking one of the three columns "*Developing*", "*Developed*", "*Highly Developed*";

- If the practice is not in place, add "N" for *No* in the second column and create an action plan to explain how you will ensure that this practice is in place before the evaluation visit; no tick needed in the other columns.

b) You assess each standard for each programme you teach:

Environments: Providing essential structures, systems and resources		Shows notable development	Shows development beyond requirements	Offers opportunity for further development	Requires significant development
Leadership and governance (0201)	The leadership and governance of IB World Schools create and sustain high-quality learning environments.	School self-assessment			
		PYP			
		MYP			
		DP			
		CP			

To do so, please step back from looking at each practice separately and look at the standard as a whole, then assess by a tick if it "*Shows notable development*", "*Shows development beyond requirements*", "*Offers opportunity for further development*" or "*Requires significant development*".

c) You share 1-3 major achievements and 1-3 major challenges that your school has faced for this standard. Please develop your explanation through a short paragraph:

Describe any major achievement(s) relating to this standard during the period under review.

Describe any major challenge(s) relating to this standard during the period under review.

You don't have to evidence your choices by sharing documents with us. The Evaluation team will look at your self-study and compare it with what they see in your school to provide you with their own assessment for each standard.

D. Development plan

The development plan is the *Part 2* in the self-study questionnaire or can be found as a separate document.

The development plan is a key part of the improvement cycle in a school:
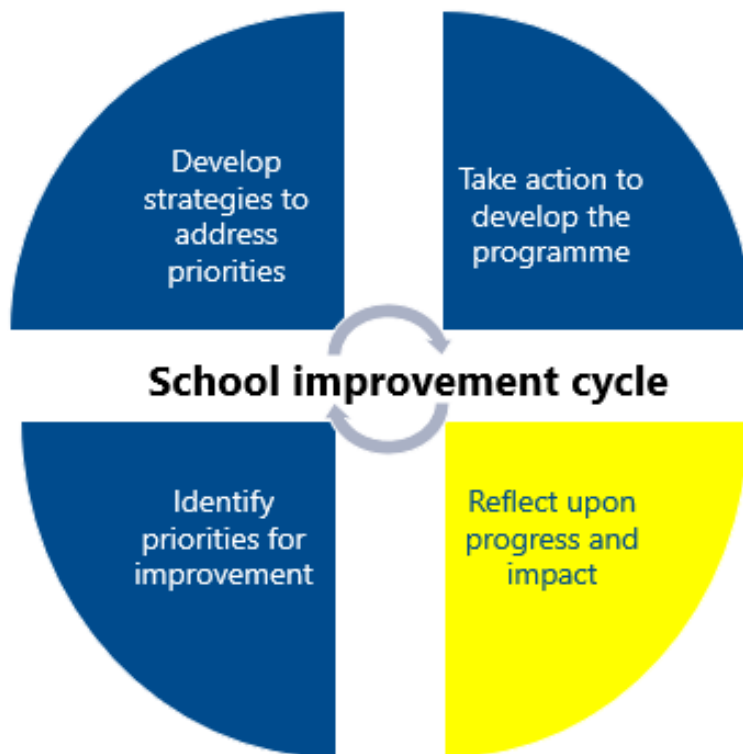
As a school, you are required to find 1 to 3 development plans that run simultaneously. Each of them can have a different duration, but the idea is that as soon a development plan is completed, the school creates a new one with the information gathered while completing the previous development plan. For the evaluation purposes, the school shares one development plan that has been completed and reflected on during the 5 years that are reviewed at this specific evaluation. There are 4 steps for a development plan:

a) finding the right *area of focus*

As a school, you know what you want to focus your attention on and improve in order to impact your students positively in the future. Therefore, the school brainstorms and finds an *area of focus* to work on.

b) using the *Programme Standards and Practices* as a tool to plan the development plan itself

Once the area of focus has been selected, you create your development plan. To do so, you choose the practices that will be the best tool for your area of focus to be a success. Here is the process:
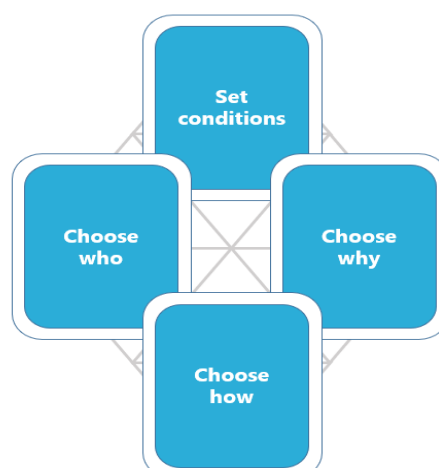
1. Choose 1 or 2 practices that set the **conditions** for the development plan to be implemented.

2. Choose 1 or 2 practices to show **who** is responsible in the development plan (cf: each practice includes "**who** is in charge": *The coordinator does…/The schools does…/Teacher do…*)

3. Choose 1 or 2 practices that explain **how** the development plan will be achieved and evidenced.
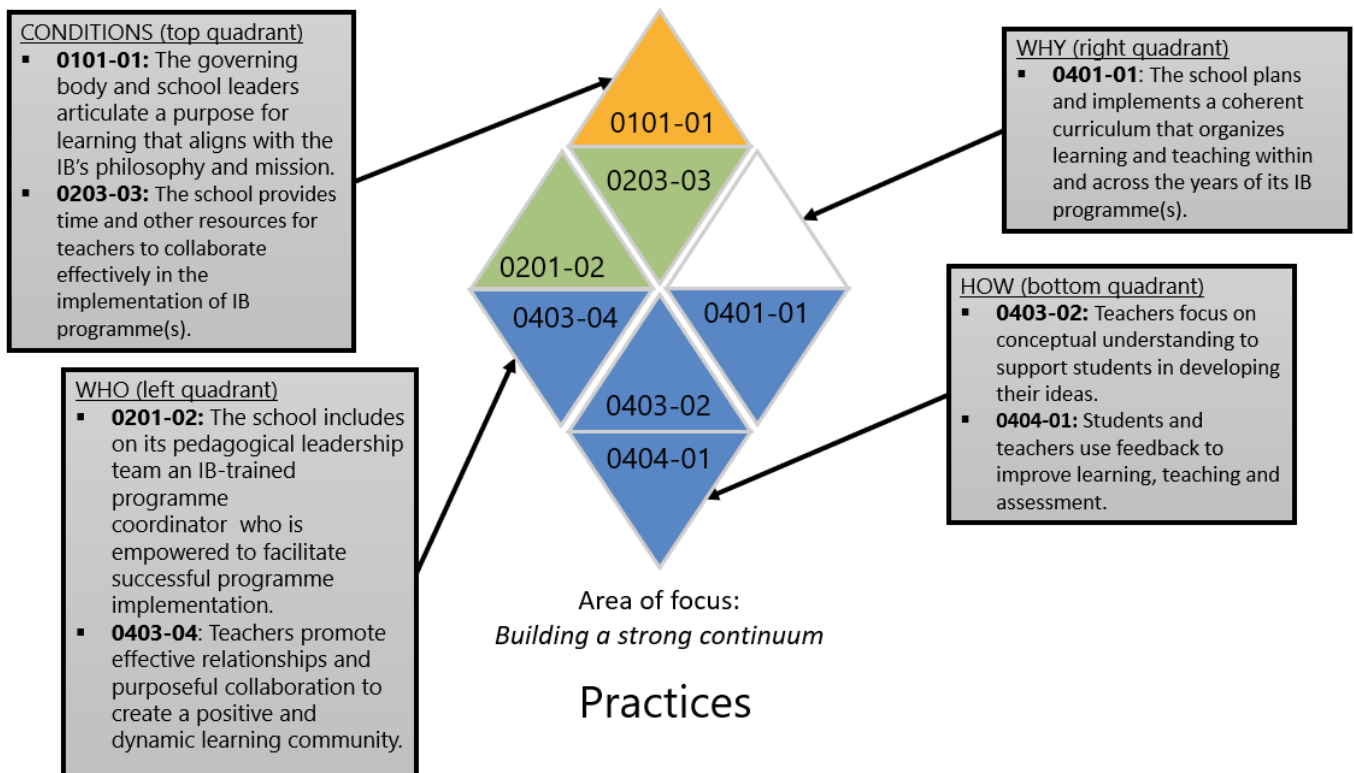
4. Choose 1 or 2 practices that indicate **why** the development plan has been made (the **why** can be a goal, an outcome or a reason for the practices being grouped together).

Please remember that in a development plan, you need to use at least two different *colours* to ensure that the school's ecosystem is seen as a whole (The *Programme Standards and* Practices are separated in 4 colours: Purpose in yellow, Learning in blue, Culture in grey and Environment in green).

Here is an example for a school that chose "*Building a strong continuum*" as their area of focus:

CONDITIONS (top quadrant)
- **0101-01:** The governing body and school leaders articulate a purpose for learning that aligns with the IB's philosophy and mission.
- **0203-03:** The school provides time and other resources for teachers to collaborate effectively in the implementation of IB programme(s).

WHY (right quadrant)
- **0401-01:** The school plans and implements a coherent curriculum that organizes learning and teaching within and across the years of its IB programme(s).

WHO (left quadrant)
- **0201-02:** The school includes on its pedagogical leadership team an IB-trained programme coordinator who is empowered to facilitate successful programme implementation.
- **0403-04:** Teachers promote effective relationships and purposeful collaboration to create a positive and dynamic learning community.

HOW (bottom quadrant)
- **0403-02:** Teachers focus on conceptual understanding to support students in developing their ideas.
- **0404-01:** Students and teachers use feedback to improve learning, teaching and assessment.

0101-01
0203-03
0201-02
0403-04
0401-01
0403-02
0404-01

Area of focus:
Building a strong continuum

Practices

As you can see, the first step is to choose the right practices. Then you have to reflect on the impact this development plan will have for your students, the evidence you will gather to assess the success of the development plan, the activities you plan to do, as well as the research you may use as tools in your reflection:

CONDITIONS (top quadrant)
It is difficult to promote a continuum without a clearly articulated purpose for learning that considers the power of continuum-based approach. The school must also provide the time and resources to ensure that a continuum-driven process is implemented.

WHY (right quadrant)
Articulating and implementing a coherent curriculum is vital for Continuum schools. Coherency happens both vertically and horizontally, and for some schools in alignment with national or local curriculums.

WHO (left quadrant)
IB-trained coordinator(s) understand both the pedagogical and operational aspects of implementing programmes. They help teachers promote collaboration and encourage the growth of the learning community.

HOW (bottom quadrant)
Conceptual understanding is common to all programmes and provides a solid basis for establishing approaches to learning and teaching that take the IB continuum into consideration. Feedback shared between teachers and students within and across age groups helps to gauge how conceptual understanding develops in students.

0101-01
0203-03
0201-02
0403-04   0401-01
0403-02
0404-01

Area of focus:
Building a strong continuum

Practices

This process should be as collaborative as possible, involving school leaders, staff and the broader school community where possible.

c) implementing the development plan

Once this step is done (the step *b)* is known as *Planning* in the development plan template), the school has to implement its development plan (this usually has a duration period between 6 months and 3 years. It may be even longer if needed).

d) reflecting on the development plan

Once the development plan is completed, you are invited to reflect on the process, its challenges and its results. The development plan template includes questions to guide your reflection ("*How did you learn what the impact of the work was? What data or evidence did you gather?*", "*Were there any changes in the practices you chose as part of your initial area of focus?*").

The development plan is a key part of the evaluation process, because your school reflects on what it has learned from engaging in this process and how it can be applied to future development plans. The Evaluation team will discuss these challenges and opportunities you pointed out and give some possible next steps to reflect on.