**DOCTORAL PROGRAMME IN EDUCATIONAL PSYCHOLOGY:** Placement Handbook

### Appendix 7: Placement Interim Review Pro-formas

Last updated: September 2023

The following documents should form the basis for discussion at the Placement Interim Reviews in November and March/April between the trainee, supervisor/supervision co-ordinator and personal tutor. See sections 2.7.1 and 3.7.1 for more information about these meetings.

The final record of both interim review meetings should be emailed to the course administrator (edpsych-fels@soton.ac.uk) by the end of Autumn term for the November meeting and by the end of the first week in May for the March/April meeting, **with copies to the trainee’s personal tutor, supervision co-ordinator and placement PEP.**

Signed copies of each should be submitted to the University as part of the practical work file at the end of the year.

**UNIVERSITY OF SOUTHAMPTON, DOCTORAL PROGRAMME IN EDUCATIONAL PSYCHOLOGY**

**Year 2 November (first) Interim Review Pro-forma [IRY2-1]**

This document is intended to aid the interim review with your supervision co-ordinator and personal tutor. Trainees should complete sections 1 to 10 and then forward to their supervision co-ordinator for their comments in time for the meeting.

**Trainee EP: Supervision Co-ordinator:**

**Psychological Service: Personal Tutor:**

|  |  |
| --- | --- |
| 1 | Are you aware of the following LA policies (Y/N)? |
| * Child protection/safeguarding policy.
* Health and safety policies (eg, home visits).
* Information sharing/confidentiality policy.
 | * Data protection policy.
* Equality and diversity policies.
* raising concerns about the safety and wellbeing of service users.
 |
|  | Have any issues arisen in relation to the HCPC Standards of conduct, performance and ethics: |
|  | * Promote and protect the interests of service users and carers.
* Communicate appropriately and effectively.
* Work within the limits of knowledge and skills.
* Delegate appropriately.
 | * Respect confidentiality.
* Manage risk.
* Report concerns about safety.
* Be open when things go wrong.
* Be honest and trustworthy.
* Keep records of work.
 |
|  | If yes, please give details. |
| 2 | What has gone well on this placement so far? |
| 3 | ***Supervision***1. How much feedback are you getting from your supervision co-ordinator/fieldwork facilitator(s) on your performance?
2. Have you had weekly supervision?
3. How long have these sessions been on average?
4. Do you have any concerns you would like to raise regarding the amount or type of supervision?
5. How many times have you been observed *since the start of placement* (PPPF recommends monthly observation)?
	1. Was an ERS completed?

*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |

 |
| 4 | ***Workload/time management issues***a. How are you finding the workload?b. What proportion of time are you spending working on your own?1. Casework (**since start of placement**):
	* + 1. Individual consultations (problem solving consultations where you have not met the CYP individually)
			2. Statutory casework
			3. Other casework
2. How are your diary management skills developing?
3. Have you discussed with your supervisor taking a block of time away from placement to work on your thesis?

*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |
| 1 | 2 | 3 | 4 | 5 |

 |
| 5 | **Professional relationships**Please comment on how you feel you have developed working relationships with the following, as applicable:a. EP team members.b. Other key LA staff (eg, teacher advisors, social workers, educational welfare officers, etc)c. School staff (eg, casework negotiation with SENCos)*Comments?* |
| 6 | **Breadth of experience**a. How many opportunities have you had so far to observe other EPs at work?b. Approximately how many EPs have you so far been actively involved with on this placement?c. Approximately how many external agency professionals (not EPs or teachers) have you been actively involved with on the placement so far?*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too few | About right | Too many |
| 1 | 2 | 3 | 4 | 5 |

 |
| 7 | Have opportunities been identified yet for work in the following areas (Y/N)?* Problem solving and consultation
* Direct work with primary, secondary and pre-school aged children and young people
* Work with parents/carers
* Work with teachers and other professionals
* Planning and reviewing interventions
* Multi-agency liaison
* Training and work at other levels
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| 8 | Are there particular aspects of the EP work with which you feel you have experienced difficulty or where you feel uncomfortable?Are there any unresolved issues about which you remain concerned? |
| 9 | If not already undertaken, have you identified an appropriate organisation for the Diversity Placement?If yes, have you started negotiations for the project you will undertake during the placement? Please specify below. |
| 10 | Review of targets from Year 1 final appraisal meeting.

|  |  |  |
| --- | --- | --- |
| Target & actions | Achieved? | On track? |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |

Additional comments? |

**Supervision co-ordinator comments** (Please complete prior to interim review)

**For discussion at the Interim review**

New Targets (to be agreed as part of the discussion) and actions to be completed by the next Interim Review Meeting.

|  |  |
| --- | --- |
| Target | Action |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

 **Additional issues arising** (completed by the personal tutor during the meeting and typed up by the TEP).

Signed ………………………………………………….. (Trainee) Date ………………………………

Signed ………………………………………………….. (Supervision Co-ordinator) Date ………………………………

Signed …………………………………………………. (Personal tutor) Date ……………………………..

Signed …………………………………………………. (PEP) Date ……………………………..

*Trainees should email completed forms to Angela Goodall by the given deadline* ***(with a copy to their personal tutor, their Supervision Co-ordinator and their placement Principal Educational Psychologist)*** *and ensure signed forms are added to their work file.*

**UNIVERSITY OF SOUTHAMPTON, DOCTORAL PROGRAMME IN EDUCATIONAL PSYCHOLOGY**

**Year 2 March/April (second) Interim Review Pro-forma [IRY2-2]**

This document is intended to aid the interim review with your supervision co-ordinator and personal tutor. Trainees should complete sections 1 to 10 and then forward to their supervision co-ordinator for their comments in time for the meeting.

**Trainee EP: Supervision Co-ordinator:**

**Psychological Service: Personal Tutor:**

|  |  |
| --- | --- |
| 1 | Have any issues arisen of relevance to the following LA policies? (Y/N) |
| * Child protection/safeguarding policy.
* Health and safety policies (eg, home visits).
* Information sharing/confidentiality policy.
 | * Data protection policy.
* Equality and diversity policies.
* raising concerns about the safety and wellbeing of service users.
 |
|  | *Please expand below for any ‘yes’ answers.* |
|  | Have any issues arisen in relation to the HCPC Standards of conduct, performance and ethics: |
|  | * Promote and protect the interests of service users and carers.
* Communicate appropriately and effectively.
* Work within the limits of knowledge and skills.
* Delegate appropriately.
 | * Respect confidentiality.
* Manage risk.
* Report concerns about safety.
* Be open when things go wrong.
* Be honest and trustworthy.
* Keep records of work.
 |
|  | If yes, please give details. |
| 2 | What has gone well on this placement so far? |
| 3 | ***Supervision***1. How much feedback are you getting from your supervision co-ordinator/fieldwork facilitator(s) on your performance?
2. Have you had weekly supervision?
3. How long have these sessions been on average?
4. Do you have any concerns you would like to raise regarding the amount or type of supervision?
5. How many times have you been observed *since the start of placement* (PPPF recommends monthly observation)?
	1. Was an ERS completed?

*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |

 |
| 4 | ***Workload/time management issues***a. How are you finding the workload?b. What proportion of time are you spending working on your own?1. Casework (**since last interim review – DATE:** ………………………….. ):
	* + 1. Individual consultations (problem solving consultations where you have not met the CYP individually)
			2. Statutory casework
			3. Other casework

d. How are your diary management skills developing?*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |
| 1 | 2 | 3 | 4 | 5 |

 |
| 5 | **Professional relationships**Please comment on how you feel you have developed working relationships with the following, as applicable:a. EP team members.b. Other key LA staff (eg, teacher advisors, social workers, educational welfare officers, etc)c. School staff (eg, casework negotiation with SENCos)*Comments?* |
| 6 | **Breadth of experience**a. How many opportunities have you had so far to observe other EPs at work?b. Approximately how many EPs have you so far been actively involved with on this placement?c. Approximately how many external agency professionals (not EPs or teachers) have you been actively involved with on the placement so far?*Comments?* |

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| --- | --- | --- |
| Too few | About right | Too many |
| 1 | 2 | 3 | 4 | 5 |

 |
| 7 | Are you being given sufficient opportunity to practise (Y/N)?* Problem solving and consultation
* Direct work with primary, secondary and pre-school aged children and young people
* Work with parents/carers
* Work with teachers and other professionals
* Planning and reviewing interventions
* Multi-agency liaison
* Training and work at other levels
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| 8 | Are there particular aspects of the EP work with which you feel you have experienced difficulty or where you feel uncomfortable?Are there any unresolved issues about which you remain concerned? |
| 9 | If not already undertaken, have you identified an appropriate organisation for the Diversity Placement?If yes, have you started negotiations for the project you will undertake during the placement? Please specify below. |
| 10 | Review of targets from first interim review meeting.

|  |  |  |
| --- | --- | --- |
| Target | Action | Achieved/On track? |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |

Additional comments? |
|  |  |
| **Supervision co-ordinator comments** (Please complete prior to interim review)PASTE HERE SECTION B COMMENTS FROM SUMMATIVE REPORT (“Placement Supervisor Overall Comment on Trainee Performance – March/April Interim Review”)Areas of trainee strength:*
*

Areas trainee should target:*
*
 |

**For discussion at the Interim review**

New Targets (to be agreed as part of the discussion) and actions to be completed by the end of year appraisal meeting.

|  |  |
| --- | --- |
| Target | Action |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

 **Additional issues arising** (completed by the personal tutor during the meeting and typed up by the TEP).

Signed ………………………………………………….. (Trainee) Date ………………………………

Signed ………………………………………………….. (Supervision Co-ordinator) Date ………………………………

Signed …………………………………………………. (Personal tutor) Date ……………………………..

Signed …………………………………………………. (PEP) Date ……………………………..

*Trainees should email completed forms to Angela Goodall by the given deadline* ***(with a copy to their personal tutor, their Supervision Co-ordinator and their placement Principal Educational Psychologist)*** *and ensure signed forms are added to their work file.*

**UNIVERSITY OF SOUTHAMPTON, DOCTORAL PROGRAMME IN EDUCATIONAL PSYCHOLOGY**

**Year 3 November (first) Interim Review Pro-forma [IRY3-1]**

This document is intended to aid the interim review with your supervisor and personal tutor. Trainees should complete sections 1 to 9 and then forward to their Supervisor for their comments in time for the meeting.

**Trainee EP: Supervisor:**

**Psychological Service: Personal Tutor:**

|  |  |
| --- | --- |
| 1 | Are you aware of the following local authority policies (Y/N)? |
| * Child protection/safeguarding policy.
* Health and safety policies (eg, home visits).
* Information sharing/confidentiality policy.
 | * Data protection policy.
* Equality and diversity policies.
* raising concerns about the safety and wellbeing of service users.
 |
|  | Have any issues arisen in relation to the HCPC Standards of conduct, performance and ethics: |
|  | * Promote and protect the interests of service users and carers.
* Communicate appropriately and effectively.
* Work within the limits of knowledge and skills.
* Delegate appropriately.
 | * Respect confidentiality.
* Manage risk.
* Report concerns about safety.
* Be open when things go wrong.
* Be honest and trustworthy.
* Keep records of work.
 |
|  | If yes, please give details. |
| 2 | What has gone well on this placement so far? |
| 3 | ***Supervision***1. How much feedback are you getting from your supervision co-ordinator/fieldwork facilitator(s) on your performance?
2. Have you had weekly supervision?
3. How long have these sessions been on average?
4. Do you have any concerns you would like to raise regarding the amount or type of supervision?
5. How many times have you been observed *since the start of placement* (PPPF recommends monthly observation)?
	1. Was an ERS completed?

*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |

 |
| 4 | ***Workload/time management issues***a. How are you finding the workload?b. Casework (**since the start of placement**):* + - 1. Individual consultations (problem solving consultations where you have not met the CYP individually)
			2. Statutory casework
			3. Other casework

c. How are your diary management skills developing?d. How are you balancing placement and thesis work?1. Have you discussed with your supervisor taking a block of time away from placement to work on your thesis?

*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |

 |
| 5 | **Professional relationships**Please comment on how you feel you have developed working relationships with the following, as applicable:a. EP team members.b. Other key LA staff (eg, teacher advisors, social workers, educational welfare officers, etc)c. School staff (eg, casework negotiation with SENCos)*Comments?* |
| 6 | **Breadth of experience**a. How many opportunities have you had so far to observe other EPs at work?b. Approximately how many EPs have you so far been actively involved with on this placement?c. Approximately how many external agency professionals (not EPs or teachers) have you been actively involved with on the placement so far?*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too few | About right | Too many |
| 1 | 2 | 3 | 4 | 5 |

 |
| 7 | Have opportunities been identified yet for work in the following areas (Y/N)?* Problem solving and consultation
* Direct work with primary, secondary and pre-school aged children and young people
* Work with parents/carers
* Work with teachers and other professionals
* Planning and reviewing interventions
* Multi-agency liaison
* Training and work at other levels
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| 8 | Are there particular aspects of the EP work with which you feel you have experienced difficulty or where you feel uncomfortable?Are there any unresolved issues about which you remain concerned? |
| 9 | Review of targets from Year 2 final appraisal meeting.

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| --- | --- | --- |
| Target | Action | Achieved/On track? |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |

Additional comments? |

**Supervisor comments** (Please complete prior to interim review)

**For discussion at the Interim review**

New Targets (to be agreed as part of the discussion) and actions to be completed by the next Interim Review Meeting.

|  |  |
| --- | --- |
| Target | Action |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

 **Additional issues arising** (completed by the personal tutor during the meeting and typed up by the TEP).

Signed ………………………………………………….. (Trainee) Date ………………………………

Signed ………………………………………………….. (Supervisor) Date ………………………………

Signed …………………………………………………. (Personal tutor) Date ……………………………..

Signed …………………………………………………. (PEP) Date ……………………………..

*Trainees should email completed forms to Angela Goodall by the given deadline* ***(with a copy to their personal tutor, their Supervision Co-ordinator and their placement Principal Educational Psychologist)*** *and ensure signed forms are added to their work file.*

**UNIVERSITY OF SOUTHAMPTON, DOCTORAL PROGRAMME IN EDUCATIONAL PSYCHOLOGY**

**Year 3 March/April (second) Interim Review Pro-forma [IRY3-2]**

This document is intended to aid the interim review with your supervisor and personal tutor. Trainees should complete sections 1 to 9 and then forward to their Supervisor for their comments in time for the meeting.

**Trainee EP: Supervisor:**

**Psychological Service: Personal Tutor:**

|  |  |
| --- | --- |
| 1 | Have any issues arisen of relevance to the following LA policies? (Y/N) |
| * Child protection/safeguarding policy.
* Health and safety policies (eg, home visits).
* Information sharing/confidentiality policy.
 | * Data protection policy.
* Equality and diversity policies.
* raising concerns about the safety and wellbeing of service users.
 |
|  | *Please expand below for any ‘yes’ answers.* |
|  | Have any issues arisen in relation to the HCPC Standards of conduct, performance and ethics: |
|  | * Promote and protect the interests of service users and carers.
* Communicate appropriately and effectively.
* Work within the limits of knowledge and skills.
* Delegate appropriately.
 | * Respect confidentiality.
* Manage risk.
* Report concerns about safety.
* Be open when things go wrong.
* Be honest and trustworthy.
* Keep records of work.
 |
|  | If yes, please give details. |
| 2 | What has gone well on this placement so far? |
| 3 | ***Supervision***1. How much feedback are you getting from your supervision co-ordinator/fieldwork facilitator(s) on your performance?
2. Have you had weekly supervision?
3. How long have these sessions been on average?
4. Do you have any concerns you would like to raise regarding the amount or type of supervision?
5. How many times have you been observed *since the start of placement* (PPPF recommends monthly observation)?
	1. Was an ERS completed?

*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |

 |
| 4 | ***Workload/time management issues***a. How are you finding the workload?b. Casework (**since last interim review – DATE:** ………………………….. ):* + - 1. Individual consultations (problem solving consultations where you have not met the CYP individually)
			2. Statutory casework
			3. Other casework

c. How are your diary management skills developing?d. How are you balancing placement and thesis work?*Comments?* |

|  |  |  |
| --- | --- | --- |
| Too little | About right | Too much |
| 1 | 2 | 3 | 4 | 5 |

 |
| 5 | **Professional relationships**Please comment on how you feel you have developed working relationships with the following, as applicable:a. EP team members.b. Other key LA staff (eg, teacher advisors, social workers, educational welfare officers, etc)c. School staff (eg, casework negotiation with SENCos)Additional comments? |
| 6 | **Breadth of experience**a. How many opportunities have you had so far to observe other EPs at work?b. Approximately how many EPs have you so far been actively involved with on this placement?c. Approximately how many external agency professionals (not EPs or teachers) have you been actively involved with on the placement so far?Comments? |

|  |  |  |
| --- | --- | --- |
| Too few | About right | Too many |
| 1 | 2 | 3 | 4 | 5 |

 |
| 7 | Are you being given sufficient opportunity to practise (Y/N)?* Problem solving and consultation
* Direct work with primary, secondary and pre-school aged children and young people
* Work with parents/carers
* Work with teachers and other professionals
* Planning and reviewing interventions
* Multi-agency liaison
* Training and work at other levels
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| 8 | Are there particular aspects of the EP work with which you feel you have experienced difficulty or where you feel uncomfortable?Are there any unresolved issues about which you remain concerned? |
| 9 | Review of targets from first interim review meeting.

|  |  |  |
| --- | --- | --- |
| Target | Action | Achieved/On track? |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |

Additional comments? |
|  |  |
| **Supervision co-ordinator comments** (Please complete prior to interim review)PASTE HERE SECTION B COMMENTS FROM SUMMATIVE REPORT (“Placement Supervisor Overall Comment on Trainee Performance – March/April Interim Review”)Areas of trainee strength:Areas trainee should target:*
*
 |

**For discussion at the Interim review**

New Targets (to be agreed as part of the discussion) and actions to be completed by the end of year appraisal meeting.

|  |  |
| --- | --- |
| Target | Action |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

 **Additional issues arising** (completed by the personal tutor during the meeting and typed up by the TEP).

Signed ………………………………………………….. (Trainee) Date ………………………………

Signed ………………………………………………….. (Supervisor) Date ………………………………

Signed …………………………………………………. (Personal tutor) Date ……………………………..

Signed …………………………………………………. (PEP) Date ……………………………..

*Trainees should email completed forms to Angela Goodall by the given deadline* ***(with a copy to their personal tutor, their Supervision Co-ordinator and their placement Principal Educational Psychologist)*** *and ensure signed forms are added to their work file.*