

DESIGN AN ASSESSMENT STRATEGY

The design of an assessment strategy is a *key part of the assessment process*.

The way in which the assessment will be conducted is determined during this phase.

Specific outcome 2 and assessment criteria to design the strategy are projected below.

SPECIFIC OUTCOME 2: Design an assessment strategy

Assessment criteria

- 2.1. The design includes opportunities for holistic and integrated assessment. Multiple specific outcomes and assessment criteria are assessed simultaneously where possible to increase opportunities for integrated assessment.
- 2.2. Provision is made for the collection of evidence from a variety of sources to ensure the reliability of assessment judgments.
- 2.3. Opportunities for gathering naturally occurring evidence are identified and planned whenever possible, so as to improve assessment efficiency and match assessment conditions to real performance conditions.

Range: Naturally occurring evidence refers to evidence gathered during the normal course of actual work performance.

- 2.4. Time allocated for the assessment is realistic, can be justified in terms of source documents and is sufficient for the nature of the performances being assessed and/or parties affected.

Range: Affected parties could include the assessor, candidate, ETQA, assessor's organisation and/or candidate's organisation.

- 2.5. The design makes provision for any special needs in the assessment context, but without compromising the validity of assessment.

- 2.6. The design identifies opportunities for candidate input into assessment where appropriate. A clear rationale for assessment procedures is provided and options carefully considered ahead of discussions with the candidate.

Range: Procedures, what is to assessed, opportunities for gathering evidence how and when assessment will take place, roles and responsibilities of candidate and assessor , appeal procedures, what will be done with assessment data.

2.7. The assessment strategies are consistent with the defined purpose of the assessment and the evidence requirements revealed in the analysis.

2.8. Principles of good assessment practices are described. The description highlights the advantages of observing the principles, and the potential consequences of disregarding the principles.

Range: See "Supplementary information" for a definition of principles of good assessment.

2.9. Standards-based and traditional approaches to assessment are contrasted. The similarities and differences are identified and advantages and disadvantages of each approach for the assessor's context are discussed.

Range: Similarities and differences in terms of assessment methodology, advantages to learners, employers and institutions, impact on learners and assessors, and means of reporting result.

2.10. The design incorporates lessons learned during the review of, and reflection on, past practice.

Based on the analysis of source documents and assessment contexts as well as identified evidence requirements and methods to gather the appropriated evidence at this stage, the assessment strategy needs to be designed.

The most important part during the process of designing the assessment is to determine the overall strategy.

The following should be used as guidelines in this regard:

- The ***purpose of assessment*** is clearly defined
- The assessment ***approach*** is described
- Use naturally - occurring evidence
- Ensure triangularity of evidence (*Knowledge, process, product*)
- Ensure that assessment activities focus on the outcome
- Ensure sufficient assessment activities to gather sufficient evidence according to the assessment criteria
- Ensure adhering to ***principles*** of good assessment
- Involve the candidate to suggest ways to gather evidence
- Ensure ***cost-effective*** assessments
- Provision are made for the collection of evidence
- Ensure the ***time allocated*** for assessment is realistic
- Is the ***context*** clearly defined and described
- All role-players defined and responsibilities described
- Appeals procedures described
- How will assessment records been kept

7.1. Defining the assessment strategy

The following steps to define/formulate the assessment strategy are applicable:

1. Conduct an assessment specification based on your analysis.
2. Design and describe the assessment strategy to provide an overview of the assessment activities, instructions to the assessors, instructions to the candidates, logistics and assessment conditions.

The examples on the following pages will assist you in the process of defining and formulating your assessment strategy in line with the applicable unit standard.

EXAMPLE 1

ASSESSMENT STRATEGY			
TARGET GROUP	<i>Describe who this assessment strategy is intended for list job occupations</i>		
UNIT STANDARD TITLE	<i>List all the unit standards</i>	NUMBER	
		CREDITS	
ENTRY LEVEL REQUIREMENTS	<i>Learning assumed to be in place and/or workplace requirements</i>		

PURPOSE OF ASSESSMENT	<i>Describe the reasons for this assessment</i>
ASSESSMENT APPROACH	<i>Describe how you intent to conduct this assessment. Eg Will learners be assess during training (formative assessment) or is this the final assessment (summative)</i>

CONTEXT OF ASSESSMENT	
ASSESSMENT CONDITIONS	
<i>Describe where the assessment will take place and how long it will take</i>	
SPECIAL ASSESSMENT NEEDS OR ORGANISATION SPECIFIC REQUIREMENTS	<i>Describe any special arrangements required for this assessment</i>
RESOURCES	<i>List all resources that you would require for assessment</i>

ROLE-PLAYERS	
Assessor	<i>Describe who will be involved and what will be expected from them</i>
Candidate	
Moderators	
Other	

ASSESSMENT SPECIFICATION

Unit Standard Title	Assessment Approach and Methods	
	Formative	Summative

SO Number	AC Number	Question Number	Knowledge	Role-play	Simulation	Case Studies	Observation	Interview	Product	Other

Range Statement/Embedded Knowledge	Question Number	Knowledge	Role-play	Simulation	Case Studies	Observation	Interview	Product	Other

Critical Cross-fields	Question Number	Knowledge	Role-play	Simulation	Case Studies	Observation	Interview	Product	Other

QUALITY ASSURANCE	<i>Describe the moderation procedures</i>
APPEALS PROCEDURES	<i>Describe appeals procedures</i>

ASSESSMENT PROCESS	
What:	How: <i>(Describe process make sure that assessment principles are maintained)</i>

Method	Knowledge Test	Observation	Sample Review	Structured Interview
Instrument	Exam Paper	Checklist	Supervisor Questionnaire	Interview Sheet
Evidence Type	Knowledge	Process	Product	Knowledge / Process(Re-assess)
Unit Standard Name				
S/O 1				
S/O 2				
S/O 3				
EEK				
EEK				
EEK				
AssCrit 1				
AssCrit 2				
AssCrit 3				
Range				
Range				
Unit Standard Name				
S/O 1				
S/O 2				
S/O 3				
EEK				
EEK				
EEK				
AssCrit 1				
AssCrit 2				
AssCrit 3				
Range				
Range				
Purpose	Instrument Purpose	Instrument Purpose	Instrument Purpose	Instrument Purpose
Re-assessment Options	If candidate is unsuccessful in any of the above instruments, how will re-assessment take place on that portion of the competence requirements?			