

# PURPOSEFUL **ASSESSMENT PLANNING:**

## A **BEST PRACTICE** APPROACH TO CONTINUOUS IMPROVEMENT



LiveText is the **industry standard** outcomes assessment solution. **More than 400 programs and institutions** count on LiveText to help improve student learning, manage accreditation and compliance and create a thriving culture of evidence-based assessment practices.

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# Purposeful Assessment Planning



# Purposeful Assessment Planning:

## A Best Practice Approach to Continuous Improvement

Welcome to the LiveText assessment planning guide! This Guide was crafted based on our experience since 1997 working with hundreds of higher education institutions, as well as our extensive engagement with thought leaders in best practice assessment and accreditation. Although many of you have already implemented some best practice-based processes, we believe that this guide can serve as a vehicle to ensure that your systems are as effective and efficient as possible. If you have any questions or need further assistance, please feel free to contact your LiveText Implementation Coordinator (IC) directly or email [implementation@livetext.com](mailto:implementation@livetext.com).



### DEFINE STUDENT LEARNING OUTCOMES AND ALIGN STANDARDS

Within a best practices framework, an assessment plan should be an overarching statement of what a program/unit/institution wants its students to *know* and *do* upon completion of their academic program(s). Specialized, professional, and regional accreditation bodies hold institutions responsible for providing reliable evidence of continuous improvement in student learning. Standards set at the institutional, academic unit, and program level also play an important role in assessment systems. Establishing targeted learning outcomes aligned with internal and external standards is the necessary first step in collecting this ‘evidence.’

Establishing student learning outcomes, and the associated assessment system, should be a highly collaborative process. This process should be led by well-qualified faculty, administrators, and staff, and it should actively engage stakeholders—most notably, students.



### DEVELOP MEASURABLE CRITERIA

Once learning outcomes are created, the next step in the process is to craft criteria by which learning can be measured. When appropriate, criteria should represent the developmental stages of student learning. Best practice suggests establishing three to six measurable criteria per learning outcome, as demonstrated in the AAC&U *Oral Communication Value Rubric*:

#### Learning Outcome:

*Oral communication is a prepared, purposeful presentation designed to increase knowledge, to foster understanding, or to promote change in the listeners' attitudes, values, beliefs, or behaviors.*

#### Measurable Criteria:

- Identify problem(s) by analyzing the impact of contextual factors, the validity of information (relevancy, sufficiency, and accuracy), and the influence of assumptions.*
- Collect additional information, as needed, using a variety of relevant sources to resolve the problem.*
- Evaluate, synthesize, and organize information to form a position and create a coherent set of conclusions to support the decisions and solutions.*

- d. *Use problem solving techniques to make informed decisions about all issues, including those with dissonant information.*
- e. *Develop and answer provocative questions; choose a realistic solution that will provide maximum benefit for the organization and all of its functions.*

Combined, learning outcomes and measurable criteria serve as the foundation of assessment rubrics. As you begin to develop and/or re-visit your institutional, college/school, and program rubrics, consider using the below 'rubric on rubrics' to assess the quality of your products:

Rubric Criteria	Unsatisfactory (0 pts)	Developing (1 pt)	Mastering (2 pts)
Rubric Alignment to Assignment 20%	The rubric includes multiple criteria that are not explicitly or implicitly reflected in the assignment directions for the learning activity to be assessed.	The rubric includes one criterion that is not explicitly or implicitly reflected in the assignment directions for the learning activity to be assessed.	The rubric criteria accurately matches the performance criteria reflected in the assignment directions for the learning activity to be assessed.
Integrity of Criteria 20%	More than one criterion contains multiple, independent constructs (similar to "double-barreled" survey questions).	One criterion contains multiple, independent constructs. All other criteria each consist of a single construct.	Each criterion consists of a single construct.
Comprehensiveness of Criteria 20%	More than one critical indicator for the competency or standard being assessed is not reflected in the rubric.	One critical indicator for the competency or standard being assessed is not reflected in the rubric	All critical indicators for the competency or standard being assessed are reflected in the rubric.
Quality of Performance Descriptors 40%	Performance descriptors are not distinct (i.e. mutually exclusive) AND collectively do not include all possible learning outcomes.	Performance descriptors are not distinct (i.e. mutually exclusive) OR collectively do not include all possible learning outcomes.	Performance descriptors are distinct (i.e. mutually exclusive) AND collectively include all possible learning outcomes.

*Developed by Dr. Lance Tomei (former Director for Assessment, Accreditation, and Data Management in the College of Education and Human Performance at the University of Central Florida / LiveText Consultant).*

According to Dr. Tomei, in *Designing Effective Standards/Competencies-aligned Rubrics*, Rubrics help to ensure (content) validity of signature assessment activities when they are aligned to applicable standards/competencies. By making clear distinctions between various performance levels, they reduce subjectivity in assessing student performance and thus contribute to higher degrees of intra- and inter-rater reliability (e.g., to ensure accurate, consistent, and fair assessment of student performance).

The process of creating and updating rubrics should be a collaborative effort among faculty. Don't hesitate to seek support from colleagues, both internal and external to the institution. To learn more how others are using rubric-based assessment to improve student learning, participate in free webinars offered by LiveText and other organizations, attend assessment-focused conferences, or join relevant list serves.



## IDENTIFY RICH ASSESSMENT ACTIVITIES

A focused assessment plan is one where clear learning outcomes are defined and measured at two, three, or more 'gateways' (i.e., significant assessment points across a student's educational experience) to determine students' learning progress. When a best practice approach is applied, the desired student learning outcomes are at the core of the entire assessment process. Sometimes, though, we find student learning outcomes are 'retro-fitted' to accommodate existing practices, assignments, and rubrics. Accrediting agencies expect the former and, generally, will not accept the latter.

Creating signature formative and summative assessments helps ensure fair, accurate, and consistent evaluation of students' performance. Stephen Chappuis and Jan Chappuis from the ETS Assessment Training Institute in Portland, Oregon contend that *how results are used* is what determines whether an assessment is formative or summative:

*To begin, let's look at summative assessment. In general, its results are used to make some sort of judgment, such as to determine what grade a student will receive on a classroom assignment, measure program effectiveness, or determine whether a school has made adequate yearly progress. Summative assessment, sometimes referred to as assessment of learning, typically documents how much learning has occurred at a point in time; its purpose is to measure the level of student, school, or program success.*

*Formative assessment, on the other hand, delivers information during the instructional process, before the summative assessment. Both the teacher and the student use formative assessment results to make decisions about what actions to take to promote further learning. It is an ongoing, dynamic process that involves far more than frequent testing, and measurement of student learning is just one of its components.*

Available at: <http://www.ascd.org/publications/educational-leadership/dec07/vol65/num04/The-Best-Value-in-Formative-Assessment.aspx>

Once the learning outcomes are defined, measurable criteria created, and associated rubrics crafted, the next step is to identify where you want to assess and measure these learning activities. Creating a curriculum map helps identify where learning outcomes will be assessed, whether via course assignments, capstone projects, internships, clinical experiences, or co-curricular activities. The result is a curriculum assessment map, uniquely-designed for a program, school, institution, or other agency and a critical component of any effective assessment system.

### Curriculum Map

	Course 101	Course 120	Course 210	Program Admission	Course 301	Course 320	Course 410	Course 420 Capstone
Outcome 1	I	A	R	A	R		A	A
Outcome 2		I	A	A		R		A
Outcome 3			I	A	R	A	R	A
Outcome 4		I	A	A			R	A
Outcome 5			I	A		R	A	A
Outcome 6			I	A		R		A

**I= Introduce R=Reinforce A=Assess**  
(Developed by Dr. Lance Tomei)



## LIVETEXT SETUP

Having established learning outcomes, aligned standards, and developed rubrics with measurable criteria, you are now ready to set up your assessment system within LiveText. LiveText staff members work to prepare your account for the first step in the set up process: constructing your rubrics in LiveText. Your institution's LiveText Administrator (or Assessment Coordinator) is the primary liaison between the institution and your LiveText IC. In cases where a full-time Live Text Administrator (LTA) position (faculty or administrator) or full-time faculty with course release time for LiveText responsibilities is not identified, several faculty and/or staff members can share the responsibilities. A key responsibility of a LTA is to put into place and uphold a process that will ensure consistency in the treatment of core rubrics. A best practice approach supports a collaborative process, whereby any changes made to rubrics on signature assessments are the result of group review and decision making.

To allow for the collection of meaningful data, the LTA uses LiveText technology to align national, institutional, unit, and/or program-level learning outcomes and standards to the appropriate elements (rows) within the rubrics. With LiveText's Standards & Outcomes Management engine, administrators can access and use the already existing public standards in the LiveText database as well as create their own standards sets at the institutional, college, department, and program levels to reflect their particular curricula, mission(s), and goals.

LiveText's extensive standards database contains over 250 National, 650 State-specific, and 11 Regional standards sets available for use by all institutions using LiveText. LiveText's new Standards & Outcomes Management engine provides further capabilities for administrators to manage the use of these standards, develop their own custom standards, and to correlate the available standards at multiple levels. The purpose of this tool is to facilitate richer outcomes-based assessment data for more informed continuous improvement. LTAs can contact their ICs to learn more about this feature or access the training manual in the LiveText Help Center.

**Master Term: Core assessment setup in LiveText.** A Master Term houses all academic courses and/or experiences that contain signature assignments and associated rubrics. The Master Term allows for the ease of setting up the assessment system plan each semester. The Master Term is a convenient way to copy and distribute course assignment shells (which include signature assignments and associated rubrics) in LiveText faculty accounts and courses each new academic semester/term.

Remember, not every course needs to house a signature formative or summative assessment. These signature assessments will generate data that will be used for accountability and accreditation, so the goal is to develop an assessment system that provides comprehensive data in the most efficient means possible.

To utilize the Master Term effectively, course catalogs for the active (i.e., current) term need to be imported either manually or, preferably, through the LiveText SIS automation process. Once key courses are identified and standards-aligned rubrics are completed, you are now ready to create the Master Terms. Each new semester/term, the LTA should copy master course assignments/rubrics from the Master Term to the active term's courses for faculty use. This is a considerable time-saver, as it avoids having to copy individual assignments/rubrics each term.

**Changes/Updates to Rubrics:** When it is determined that updates to rubrics are needed, the LTA will need to make a new version (copy) of the rubric with these updates. Best practice suggests that any changes to rubric criteria incorporate direct review and input from program faculty. Group input helps to garner cooperation, as faculty will be more likely to consider the final product to be at least

partially representative of their perspective.

The integrity of data produced—and resulting decisions related to teaching and learning—will be strengthened if the following practices are adhered to:

**UPDATES** to key assessment rubrics should not be made in individual faculty accounts; the LTA should make these updates in the administrative account prior to the start of a term—not during the term.

**COPIES** of key assessment rubrics should not be made by faculty; the LTA should make these copies of the rubrics, and re-attach them to the key assignments in the Master Term each new term.

If changes to rubrics are made mid-term and/or if faculty members replace key assessment rubrics with individual copies, data reports produced will include multiple versions of the initial rubric. This will make the data review process more complicated by reducing the clarity of data collected.

**Training Term: Sample course and assignment setup in LiveText.** A Training Term houses sample courses, assignments, and rubrics. It is used to train faculty on assessing student artifacts in LiveText. To construct a Training Term, create and import sample courses, assignments, and rubrics. Your LiveText IC will create a roster of sample students, associate them with the courses in the Training Term, and import the Training Term into LiveText.

**Active Term: Import courses, benchmarks/gateways, and student demographics.** It is strongly recommended that LiveText is integrated with an institution's student information system (SIS) and learning management system (LMS). This enhances the accuracy of the data, automatic student add/drops, and a reduction in workload on the LTA. Your LiveText IC can assist you in this process. Prior to the semester launch, set up a conference call or meeting with the appropriate IT staff and your LiveText IC. Your IC will provide technical information and work with IT to test the integration. Once the testing is complete, data from your SIS system will automatically update in LiveText on a real-time basis or on a batch basis.

If the integration is automated, the LTA can easily copy the program/unit course assignments from the Master Term to the Active Term. If the automation process was not completed, you will need to manually upload the new term course catalogs, course rosters, and student demographic information. Then copy assignments from the Master Term to the Active Term.



## LAUNCH COMMUNICATION TO FACULTY & STUDENTS

The importance of building a communication plan to support an assessment system is often neglected; however, it is a crucial element in a successful implementation plan. All stakeholders should know what the assessment goals and expectations are, what resources are available, and how data are collected and used for improvement.

**Faculty Orientation.** One of the first steps in launching an assessment plan is to organize a faculty orientation. During this meeting, it is critical to maintain a focus on the larger concepts related to assessment and accreditation. Yet, the common pitfall is 'drilling down' into the technical details of the process at this initial stage. This level of training should be reserved for faculty who are assessing in LiveText during a given semester/term. Keep the initial orientation centered on the purpose of an assessment plan: enhanced teaching and learning.

It is also important to identify the assessment leadership team, and provide adequate resources and



support to those who manage its implementation. Communication around the assessment process needs to be clear, well-organized, and, most importantly, focused on the purpose of an assessment process: continuous improvement of teaching and learning.

**Student Orientation.** Consider using multiple avenues for initial announcements and ongoing updates, including email, blogs, twitter, and other forms of social media. Information about your assessment system(s) should be communicated each semester in order to update new and transfer students. Your IC can share samples of effective communication, such as a letter from the Dean to students explaining the importance of accreditation/assessment, and the role that LiveText plays in this process.

Visible, consistent support from leadership is critical for developing, launching, and sustaining an effective assessment system, whether at the department, unit, or institution level. Without it, it is challenging to garner cooperation from all the necessary stakeholders—students, faculty, administrators, and alumni.



### TRAIN FACULTY ASSESSORS & STUDENTS

Best practice suggests that when training faculty for the first time you demonstrate and train on only the features and functions most often used. In most situations, faculty will be required to assess students on one or more signature formative or summative assessments using a rubric provided by the LTA. Therefore, you may want to limit initial faculty training to basic information, such as signing on, understanding the faculty dashboard, and conducting assessments in LiveText. Instructing faculty on how to build rubrics and assignments in their initial training session may add confusion and complexity to the project. Advanced training may be available for faculty who may want to learn how to develop course-based assessments and assignments.

Most students can learn to use LiveText through training materials that are available in the Help Center after logging in through [www.livetext.com](http://www.livetext.com), or via LiveText Implementation and Support Departments. However, some campuses will offer several 30-45 minute LiveText learning labs each semester. Your LiveText IC can offer assistance with designing student orientation and hands-on training with assignment and submission activities. LTAs should be available to students during the semester for ongoing training and support, whether in person or online.



### DATA REVIEW

During and at the end of each academic term, LTAs will create various LiveText Reports from data collected via assessed rubrics. Once the reports are created, information should be shared back to the appropriate departments. The results of the reports should be discussed (after the close of a semester or before a new semester begins) for continuous improvement at the program, school, or institution levels.

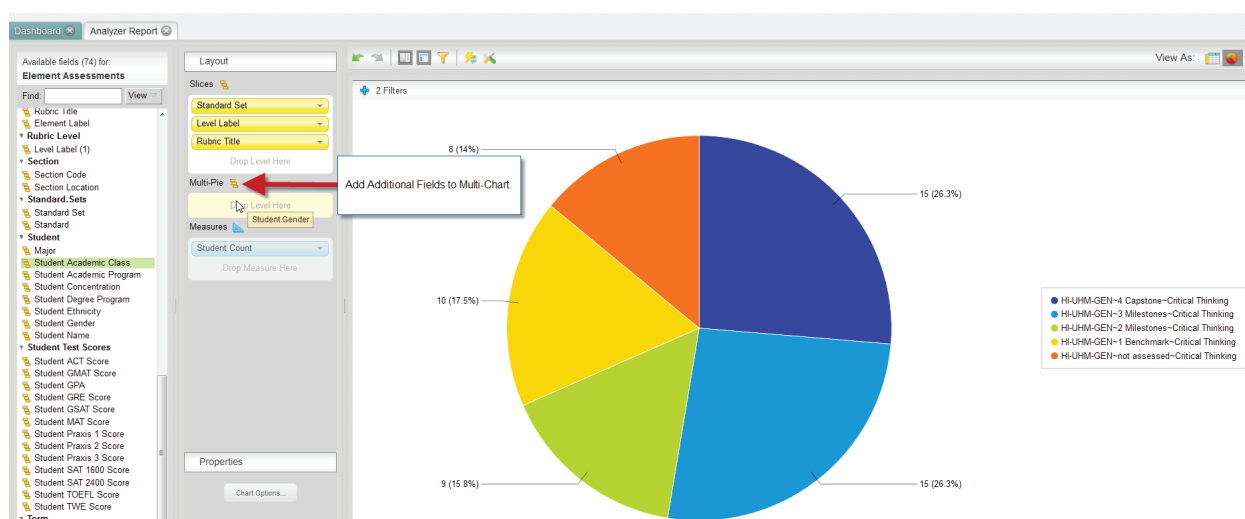
Faculty members have access to **QuickView Reports** that are available on the faculty Dashboard. It is advisable to train faculty on how to access assessment information through the **QuickView Reports**, as this will provide them with immediate information on their assessment activities.

Designated LTAs, assessment coordinators, department chairs, and administrators commonly utilize

the **Tools tab** for their reporting purposes. This enhanced reporting tool allows designated users to access, disaggregate, and aggregate rubric learning outcomes data at many levels—institution, college, program, department, and course. Further, assessment data can also be filtered by student and faculty demographics, as well as across different time periods (semester, year, time matriculated, etc.). These reports—and the assessment system they are housed within—are designed to provide evidence of continuous improvements to teaching and learning.

LiveText offers a more advanced reporting tool, **LiveText Analytics**, which is a more comprehensive reporting system that offers ad-hoc reporting and enhanced graphical representation of the above-mentioned functions, in addition to giving the institution the opportunity to compare assessment data to GPA and various national Test scores. For users' convenience, custom Dashboards can be created for personalized viewing. Reports can be saved in LiveText or exported and saved in an Excel and/or .pdf file format. The sample Dashboard below combines assessment and demographic data:

## LiveText Analytics Screenshot



**MAKE IMPROVEMENTS TO TEACHING & LEARNING**

It is important that faculty review and assess students' work in a timely fashion, within the given term. Without the on-time review, students are left to wonder not only about their progress but also to question the value of assessment. Programs/units/institutions should continually review the results and modify their processes based on data to ensure students' learning needs are met.

Include students in the feedback loop, and actively engage them in the learning and development of these outcomes. This will help them understand and value the criteria, standards, and methods by which they are assessed—making real-world connections and application of what they are learning.



## FEEDBACK LOOP: A Best Practice Approach to Continuous Improvement

Improvement and follow-up are an integral part of assessment, as they serve to ‘close the loop.’

**FORMATIVE** assessment is done to provide feedback for ongoing activities, and to inform any needed mid-course corrections.

**SUMMATIVE** assessment is done to measure a project’s overall success.

**LONGITUDINAL** assessment tracks impacts beyond the duration or initial scope of the project.

If we don’t build follow up into the assessment cycle, then the overarching purpose is lost. Assessment should be viewed as a self-reflective process for students and an opportunity for instructors and administrators to present concrete evidence of learning improvement. When a best practice process of assessment is developed, and technology is used to facilitate and support it, we are able to more clearly see a fuller picture of student learning at all levels—for individual students, within and across courses, within and across programs, and across an entire institution.

This *Purposeful Assessment Planning* guide was designed to assist higher education communities with establishing assessment systems that are framed by a best practice approach. The desired result is a process of continuous improvement that results in enhanced student learning and achievement. LiveText is proud to partner with colleges and universities in the implementation of successful academic processes to ultimately improve student learning and achievement.