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# **Guidance for writing Customised Qualifications**

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# Section 1

## How this guide will help you

The aim of these instructions is to help you develop new or revise existing Customised Qualifications and/or units through NCFE's Accreditation Services.

We hope that you find these instructions useful. But don't worry though, if you need any help or advice you can contact NCFE Accreditation Services on 0191 239 8000 and we'll be able to offer you additional guidance and support. We'll also provide feedback on your Customised Qualification submission to help you develop it, so that it's fit for purpose and meets the standard of a national Awarding Organisation.

We're always looking for ways of improving the support and guidance we offer, so if you've any comments or suggestions about this guide, please let us know by giving us a call on 0191 239 8000 or email: [Accreditationteam@ncfe.org.uk](mailto:Accreditationteam@ncfe.org.uk).

### Overview

Bespoke Customised Qualifications and units that are submitted to NCFE for accreditation must follow the same requirements of the national frameworks. This guide is designed to help you develop Customised Qualifications and units to meet these criteria.

When developing your Customised Qualification there are a number of issues to consider. These include:

- aims, objectives and target group
- level
- language
- diversity and Inclusion.

### What are the national frameworks?

The national frameworks are made up of a number of levels that represent the depth of learning and complexity. Entry Level is made up of 3 levels which provide progression to level 1. There are then another 8 levels from Level 1 to Level 8. To understand the level of difficulty of the units and qualifications, it's helpful to know some comparisons, so GCSEs (grade A\* – C) are Level 2, GCSE A Level is Level 3 and a PhD is a Level 8. See Appendix 1 for level descriptors.

*NB: Bespoke Customised Qualifications that are accredited by NCFE don't attract unit credit and aren't recognised as national qualifications because they haven't been approved by a Sector Skills Council and accredited by Ofqual. However, to gain NCFE accreditation Customised Qualifications must adhere to the criteria for level, appropriate to depth of learning and complexity; and also must be presented in the specification format that's expected of a national Awarding Organisation.*

## Issues to Consider When Developing Your Course

### Aims, objectives and target group

You'll probably have in mind a specific target group for your Customised Qualification along with broad aims and objectives. Please ensure that the units you develop reflect the aims and objectives of the Customised Qualification.

### Level

NCFE accredit Customised Qualifications up and including Level 7. Any Customised Qualifications submitted at Level 4 and above will be reviewed by a sector expert because of the complexity and depth of the level and assessment. Please see the NCFE website for fees relating to these reviews.

### Language

Your Customised Qualification should be clearly worded. NCFE follows a plain English written policy and we encourage you to write your Customised Qualification in plain English wherever possible as this gives documents a friendlier tone. For example:

Beneficial	<b>becomes</b>	Helpful, useful
Emphasise		Stress
Excluding		Apart from, except
Facilitate		Help
Implement		Carry out, do
Is in accordance with		Agrees with, follows
Permitted		Allowed
Utilise		Use

The use of specialist vocabulary should be appropriate to the level of the Customised Qualification and the target group. If it's used, it should be explained where appropriate.

In summary, use plain English, keep it concise, use minimum jargon, and aim to make the language as accessible as possible.

### Diversity and inclusion

Your Customised Qualification content must be accessible, inclusive and non-discriminatory. The nine protected characteristics (age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex) need to be considered during development. It's important to ensure that no barriers to achievement are incorporated into any learning outcomes or assessment criteria.

The following guidance should be considered when developing qualifications:

- ensure titles used for each mandatory unit and any optional units denote relevant learning outcomes
- ensure that mandatory subject matter is essential
- ensure any optional units are accessible to all groups and are equally demanding whilst maintaining the integrity of the Customised Qualification

- avoid creating barriers for particular groups; where a barrier can't be eliminated by good design, you should provide a clear justification for it
- limit prior knowledge and experience to essentials
- take account of the candidate's usual way of working
- reflect the current working practices of the particular vocational setting where possible and appropriate (if relevant).

You might find the following points useful to check that the content you produce is free from any gender, cultural, racial or religious bias.

### **Gender bias**

You should be able to answer "Yes" to each of the following questions:

- are males and females represented equally in learning outcomes and assessment criteria and examples?
- are males and females portrayed as being of equal status (eg in decision making)?
- is there variety in the order of words (eg 'women and men' should be used as frequently as 'men and women')?
- is the content of learning outcomes and assessment criteria equally within the experience of male and females?

You should be able to answer "No" to each of the following questions:

- is the male pronoun ('he') used to refer to all people?
- are women and men described only in stereotyped roles?
- are occupations referred to in a gender related way?

### **Cultural, age, sexual orientation, racial or religious bias**

You should be able to answer "Yes" to each of the following questions:

- are the situations and contexts used within the experience of candidates from a variety of cultural backgrounds?
- is ethnically biased language avoided?
- are words with racially sensitive connotations avoided?

You should be able to answer "No" to each of the following questions:

- do the learning outcomes/assessment criteria make assumptions about cultural, age, sexual orientation, racial or religious backgrounds which will make them inaccessible to any candidates?
- do the learning outcomes/assessment criteria make assumptions about cultural, age, sexual orientation, racial or religious backgrounds which will make them offensive to any candidates?

Examples which wouldn't be acceptable could be: an eighteen year old female being referred to as a girl and not a young woman; any inference that because of colour, religion or ethnicity, behaviour is characteristic of a particular group, or that all people of a particular group have a behavioural characteristic because they have religion, colour or ethnicity in common.

## Section 2

# Developing a unit or Customised Qualification structure

### Materially different

When we review your Customised Qualification we'll look at your reasons for developing it, including why our existing NCFE regulated qualifications don't meet needs. We will also check if your Customised Qualification is materially different to one of NCFE's regulated qualifications. The purpose of the materially different check is for us to be sure that your Customised Qualification is not similar to one of our regulated qualifications. We will check that the knowledge, skills and assessment(s) are different to any of our regulated qualifications. This helps to ensure that learners would not consider this as an NCFE owned and regulated qualification.

We would expect that you would check that your qualification is not similar to another regulated qualification. If you need any advice on this, please do not hesitate to get in touch by giving us a call on 0191 239 8000 or email: [accreditationteam@ncfe.org.uk](mailto:accreditationteam@ncfe.org.uk).

### What's a Unit?

When designing the structure of your Customised Qualification you need to make sure that it's fit for purpose.

A unit is defined by Ofqual as a 'coherent and explicit set of learning outcomes and related assessment criteria with a title, and level'. We've copied a completed unit as Appendix 2 at the end of this guide to illustrate how all of the different aspects work together.

All units have the following content that may need to be developed:

- unit title – see Section 3
- learning outcomes (the learner will) – see Section 6
- assessment criteria (the learner can) – see Section 7
- internal assessment guidance – see Section 8
- choosing the right assessment method – see Section 9

### Mandatory and optional units

Where possible, units should be developed so that they are stand-alone. In some cases all units may be mandatory and must be completed to achieve the full Customised Qualification. Your Customised Qualification can also include optional units where it's considered a range of topics could be addressed.

**Qualification titles**

Please be aware that the following titles can't be used in your qualification title unless you are recognised by the Office for Students:

- Degree (any, including Foundation Degree, Bachelor's Degree etc)
- Masters
- Doctorate
- Postgraduate

If you are recognised by the Office for Students we would need to see evidence of your recognition

## Section 3

### Unit titles

#### Definition

A unit title should clearly indicate the content of the unit.

#### Language

Unit titles should be a summary of the achievement in the unit. It should also be clear and unambiguous; and reflect the achievements specified in the learning outcomes and assessment criteria.

Active phrases such as 'Leading a Team' would suggest practical skills. 'Team Leadership' suggests a theory based approach to leadership. You may also have units which are a combination of theory and practical skills:

Unit titles can start with a gerund (eg 'Organising...', 'Planning...', 'Writing...')

Unit titles should not state the level or method(s) of assessment.

#### Guidance

A unit must contain a coherent group of learning outcomes that relate to each other. If it's difficult to give the unit a title, this can indicate that the learning outcomes don't fit well together.

Information on learning outcomes can be found in section 6.

#### Example:

'Sustainable Development Practices' gives a limited description of content

'Develop and Use MIDI Sequencing Skills' gives both an overview of the content and the sense of achievement

## Section 4

### Level

#### Definition

The level is an indication of the relative demand made on the learner; the complexity and/or depth of achievement; and the learner's autonomy in demonstrating that achievement.

Ofqual has developed a set of level descriptors that can be used to help make sure that the level of the unit is correct. The descriptors are provided in Appendix 1 and are adapted from Ofqual's 'Guidance for using unit level descriptors'.

#### Guidance

The level descriptors provide a set of guiding principles against which a unit and its learning outcomes and assessment criteria can be compared to ensure that it matches the required level.

The indicators for each level are grouped into three categories:

- knowledge and understanding
- application and action
- autonomy and accountability.

All units are likely to have aspects of all three categories, although many units will focus on one or two of the three.

It's important to remember that:

- a unit can be assigned to one level only
- levels are not related to years of study
- the descriptors are indicative of achievement at a particular level; they do not distinguish performance within a level.

Before starting, consider the overall aim and emphasis of the unit:

- if it's mainly concerned with knowledge and understanding, then the indicators in this category of the descriptors will be the most important in deciding level – although the way in which the knowledge and understanding is demonstrated and the level of self direction expected of the learner should be in line with the indicators in the application and action category, and the autonomy and accountability category respectively

- if it's principally concerned with occupational competence, then the indicators in the application and action category, and possibly the autonomy and accountability category, are likely to be the most important – although the level of knowledge and understanding used should also show a broad match with the relevant indicators, even if knowledge is only implied. The Ofqual 'Guidance on using the level descriptors' sets out the following 5 steps to reach a decision on level:
  1. Looking at the unit as a whole in relation to the relevant descriptor, what appears to be its dominant level?  
What's the consensus on this and how is it established?
  2. What level does each learning outcome match?  
Taken as a whole, what level do the learning outcomes infer?  
Do any learning outcomes need to be reviewed to better reflect the overall level?
  3. What level does each assessment criterion match?  
Taken as a whole, what level do the assessment criteria infer?  
Do any assessment criteria need to be rewritten to better reflect the overall level?
  4. Is there a discrepancy between (a) the dominant level of the unit as a whole and (b) the level indicated by the learning outcomes and/or assessment criteria? If so, what is the reason?  
Does it suggest revising any of the learning outcomes or assessment criteria to better match the overall level?
  5. If there's a difference between the level proposed for the unit and the findings in steps 1–4, what's your rationale for pitching the unit at a higher or lower level? This should be argued in terms of the relevant level descriptor not, for instance, where the unit fits into a Customised Qualification structure, progression route or sequence of other units. If there's no clear rationale, then you may need to reconsider either the level you're claiming for the unit or revise the unit content to reflect the target level.

Category	Level indicated	Emphasis in Unit (strong, medium or low)	Comments
Knowledge and understanding			
Application and action			
Autonomy and			
accountability			
Overall level			

It's possible to have units at different levels within your Customised Qualification. When setting the level of your Customised Qualification as a whole, more than 60% must be at the same level as the Customised Qualification or above.

In addition to levels if using the terms Award, Certificate or Diploma in an unregulated Customised Qualification title, the following must be taken into consideration regarding TQT values as noted in Ofqual's Guidance to the General Conditions of Recognition (Condition E2):

**Award** - A Customised Qualification that has a TQT value of 120 or less

**Certificate** - A Customised Qualification that has a TQT value in the range 121-369

**Diploma** - A Customised Qualification with a TQT value of 370 or more

## Section 5

# Total Qualification Time (TQT)

### Definition

TQT is the amount of hours a learner is expected to undertake in order to complete all learning outcomes within a Customised Qualification.

### Guidance

When writing learning outcomes and assessment criteria you need to consider the number of hours of learning that'll be required by learners to achieve these. You may need to think about the intended learners, ie will they need to have prior knowledge and experience to achieve the outcomes within the time. This is important for higher level Customised Qualifications when some learners may be introduced to new concepts or topics.

You should also remember that the development of understanding and development of skills may take longer than the gaining of knowledge. Learners may need lots of practice and/or support.

You should consider whether the learning can be achieved within the TQT.

Courses must be developed with a minimum value of 10 TQT.

## Section 6

### Learning Outcomes (the learner will)

#### Definition

When you develop a unit you'll be writing content as learning outcomes (the learner will) and assessment criteria (the learner can). Assessment criteria are covered in the next section.

Learning outcomes are broad statements that describe the results of a learning process (what a learner is expected to know, and/or understand and/or be able to do). Learning outcomes should clearly indicate what a learner is expected to have achieved and not the learning process or the learning activities.

A unit must have **at least** one learning outcome and one assessment criterion that relates to it. You can have as many Learning Outcomes in one unit as you wish. The statement "The learner will" has to be followed by one of the following:

**Know:** if the learning outcome is knowledge based.

**Understand:** this is still knowledge based but with a greater level of learning, for example if a learning involves comprehension of theories.

**Be able to:** this is used when the learning is practical and the learner is performing a task of some description.

#### Example 1:

##### The learner will:

be able to investigate the nature of enterprise capabilities and the importance of enterprise capabilities to the world of work.

##### The learner can:

- 1.1 Identify key enterprise characteristics and capabilities and their importance to the world of work
- 1.2 Explore project opportunities

**Example 2:****The learner will:**

be able to investigate the nature of enterprise capabilities in not for profit organisations and the importance of enterprise capabilities from this environment to the world of work.

**The learner can:**

1.3 Explain the concept of consumerism:

- green
- ethical
- anti

1.4 Outline the need for sustainable development

1.5 Explore how to identify and respond to ethical issues

1.6 Explain the need for enterprise capabilities in not for profit organisations and social enterprises

**Language**

The learning outcome statements will follow on from the standard phrasing in the unit template, which is 'The learner will...'

Remember to check the level descriptors to make sure that the level you're pitching the learning at is appropriate. The language you use will also be indicative of level.

A clear learning outcome will contain a verb and defined content. The verb used must describe what a learner is expected to have achieved rather than the learning process or the learning activities.

**Example:**

Below are some of the verbs that could be used to reflect knowledge, understanding and skills:

**Knowledge:** know, examine

**Understanding:** explore, comprehend, appreciate, recognise

**Skills:** develop, use, set up, apply, operate, deal with, promote, plan

Some learning outcomes may need to describe knowledge, understanding and skills. When writing the learning outcome you need to keep in mind how it will be assessed (through the assessment criteria in the unit and the assessment methodology for the unit/ Customised Qualification). Using a specific verb in the learning outcome, eg describe, will limit how the outcome can be assessed.

**Example 1:****The learner will:**

Identify employment roles

(This suggests that the assessment criteria will confirm that identification has taken place. If the assessment criteria ask for a career development plan to be produced and two jobs described, this is beyond the learning outcome requirements).

**Example 2:****The learner will:**

Identify employment roles

(This is sufficiently broad to allow for jobs to be identified and described although the requirement for a development plan would be questionable).

**Guidance**

It's also important to consider whether the unit is to be theory or skills based as this will also influence how the learning outcomes are written.

**Example 1:**

Unit title: Use portable music technology equipment

**The learner will:**

Operate portable recording equipment

Produce a recording on location

(As this is a practical unit the learning outcomes are written to enable skills to be developed).

**Example 1:**

Unit title: Understand the applications of music technology

**The learner will:**

Identify the technology used to generate and record sound

Summarise developments in musical styles and sound

(As this is a theory-based unit the learning outcomes are written to focus on knowledge and understanding).

It's important to think about the TQT allocated for the unit too and what can realistically be achieved within the designated time. All learning outcomes and assessment criteria must be covered in the delivery of a unit.

### Summary - Learning outcomes (The learner will)

Must	Can	Must NOT
<ul style="list-style-type: none"> <li>• Outline the knowledge, understanding and/or practical abilities that learners will apply after successfully completing the unit</li> <li>• Complement each other within the same unit, to cover the whole area of ability summarised in the unit title</li> <li>• Differ from each other within the same unit, so that they don't overlap in content</li> <li>• Match their associated assessment criteria (ie each learning outcome should encompass all of its associated assessment criteria)</li> </ul>	<ul style="list-style-type: none"> <li>• Differ in type in the same unit. So knowledge outcomes (eg awareness of...), understanding outcomes (eg understanding of...) and action/practical outcomes (eg ability to..., be able to...) can all be used in the same unit.</li> </ul>	<ul style="list-style-type: none"> <li>• Refer to assessment requirements (including by starting 'show that...' or 'demonstrate that...')</li> <li>• Refer to teaching requirements (including by starting 'develop an understanding of...')</li> <li>• Refer to more than one type of achievement in the same learning outcome (eg the LO 'recognise situations requiring referral and advise clients on options' should be split into 2 LOs eg 'recognise situations requiring referral' and 'advise clients on options')</li> <li>• Use technical language that learners would not otherwise need</li> </ul>

## Section 7

# Assessment Criteria (the learner can)

### Definition

Assessment criteria are statements which specify learner achievements and are associated with a specific learning outcome. These indicate the standards by which a judgement can be made about whether the learner has achieved or not yet achieved. The criteria should be observable, measurable and indicate the standard expected when the learner is assessed.

Assessment criteria need to be carefully considered as they impact on the delivery of your Customised Qualification or unit. You need to think about how your Customised Qualification or unit will be assessed, eg through portfolio and/or examination.

It's important to be as concise as possible to make sure that you only include assessment criteria which are relevant and measurable.

### Language

The assessment criteria will follow on from the standard phrasing in the unit template, which is:

- remember to check the level descriptors to make sure that the level you're pitching the learning at is appropriate. The language you use will also be indicative of level.
- the language used in assessment criteria must be explicit, unambiguous and objective.

Assessment criteria should contain enough detail to make it clear what is expected of the learner.

#### Example:

##### Poor Example:

##### The learner will:

- 1.1 Work safely
- 1.2 Report details to qualified assistance
- 1.3 Use equipment
- 1.4 Observe health and safety practices

(The wording in these examples is too vague and it would be difficult to determine what exactly is required of the learner).

(As this is a theory-based unit the learning outcomes are written to focus on knowledge and understanding).

##### Good Example:

##### The learner will:

- 1.1 Identify key legal and regulatory requirements affecting an event or facility
- 1.2 Select appropriate equipment and accessories for a specified event in a specified location

The previous poor example raises a number of questions:

- what details are to be reported?
- to what standard must equipment be used?
- do they simply observe or describe, explain, assess what happened?

Try to make the assessment criteria as clear and explicit as possible. Remember that you can also use the range and the assessment guidance to explain/confirm what is expected.

The examples below demonstrate how the language used can affect the assessment criteria:

- ‘maintain a safe working environment’ or ‘identify the safe use of tools’
- ‘explain the benefits of sustainable development’ or ‘identify the benefits of sustainable development’
- ‘produce a CV’ or ‘select information to be included in a CV’

In changing the wording different things may be required of the learner.

### Guidance

A unit must have at least one learning outcome and one assessment criterion that relates to it. This requirement was introduced in the previous section. Ofqual examples of verbs commonly used in assessment criteria are provided in Appendix 3. This also indicates which verbs might align more appropriately with specific levels (although this isn't restrictive).

#### Example:

Below are some of the verbs that can be used in assessment criteria.

**Knowledge:** define, identify, outline, select, state, give, match, describe, locate, discuss, illustrate

**Understanding:** justify, recommend, suggest, explain, evaluate, assess, analyse, summarise, compare, contrast, compose, appraise, reason, discuss, argue, debate

**Skills:** calculate, plan, apply, solve, adapt, use, produce, maintain, discuss, work independently, demonstrate creativity/innovation, estimate

We've also provided a chart in Appendix 4 that matches the levels of learning with Bloom's taxonomy to show the progression through the levels and in the cognitive, affective and psychomotor domains. This chart will help you to decide the type of assessment to choose for the subject and level of your Customised Qualification.

Assessment criteria should not be confused with, or refer to, types of evidence. Ideally, criteria should be written so that they can be demonstrated through a range of evidence. The assessment criteria must complement the assessment method to be applied.

You'll use the assessment criteria to help you to decide the types of evidence to be produced by the learner (we'll provide suggestions for this in unit assessment guidance – section 8).

**Example 1:****The learner can:**

1.1 Complete an accident report form

(This limits the evidence format. However, this could be appropriate if a candidate has to be able complete an accident form).

**The learner can:**

1.1 Describe information to be reported about a specific accident

(This allows different evidence formats and provides flexibility on the assessment method to be used).

You could develop a unit that may require/encourage learners to work together, eg to complete a risk assessment. You'll need to include guidance within the specification to explain what is expected from each candidate (how they show their contribution to the group).

Using phrases such as 'Understand', 'Demonstrate an understanding', 'Recognise' or 'Know' should be avoided as they don't provide evidence of achievement. It is what the learner does to demonstrate their understanding, recognition or knowledge that provides the indicators and evidence of their achievement.

Similarly, verbs such as 'Explore' or 'Experiment with' should be used carefully as they can present difficulties to assessors where they represent tasks rather than criteria that enable a judgement to be made.

Learners are entitled to support or supervision. The assessment criteria shouldn't rely on the level or type of support given to differentiate achievement from one level to the next.

The use of phrases such as "with assistance", "with guidance" or "independently" within assessment criteria are subjective, open to interpretation, and don't enable consistent assessment practice. Other subjective terms that should be avoided are, for example:

- good/bad
- fully
- effectively
- professionally
- competently
- more detailed
- more complex.

In skills/performance/task-related achievement, the assessment criteria should focus on the task that needs to be carried out to demonstrate achievement. The performance of this task alone may be sufficient to reflect the level. You need to have clear expectations of the quality of work required to achieve the unit and this should be clearly stated.

### Summary - Assessment Criteria (The learner will)

Assessment Criteria		
Must	Can	Must NOT
<ul style="list-style-type: none"> <li>• Provide terms of reference for assessment by defining the minimum that each learner needs to be able to do to demonstrate that they have achieved the learning outcome</li> <li>• Refer to requirements that will be set to individual learners (so an assessment criterion could not start 'Participate in a group activity to...')</li> <li>• Indicate which aspects of the learners' responses or evidence will provide the focus of assessment if this is not self-evident (eg 'plan each stage of an event, describing and justifying requirements to include personnel, technical resources, venue, finance')</li> <li>• Match their associated learning outcome (ie the assessment criteria should not stray beyond the scope of the learning outcome)</li> </ul>	<ul style="list-style-type: none"> <li>• Include within the set of criteria for the same learning outcome both knowledge and understanding criteria (eg 'describe..', 'explain...', 'evaluate...', etc) and practical criteria (eg 'dig...', 'design...', 'develop...', etc)</li> <li>• Start with the same verbs regardless of the level of the unit (eg the verb 'describe' could be used as the first word of an assessment criterion at any level from entry to level eight, provided that the remainder of the criterion indicated the demand of the topic to be described and the nature of the description to be provided)</li> <li>• Include qualifying words or phrases (eg 'use tone purposely to suggest light and form') but only where these will add meaning (eg unlike general, positive terms such as 'effectively' and 'competently' for example which appear at first glance to add precision but actually add nothing)</li> </ul>	<ul style="list-style-type: none"> <li>• Beg the question (eg start with the words 'show that they can...' or 'demonstrate that they can...')</li> <li>• Specify the assessment method(s) or moderation processes to be used or provide the assessment specification or instruments</li> <li>• Specify the teaching methods to be used</li> <li>• Use technical language that learners would otherwise not need</li> <li>• Start with 'understand...'</li> </ul>

## Section 8

# Assessment Guidance

### Definition

Each unit provides assessment guidance to illustrate how the assessment criteria can be evidenced.

### Language

You should ensure that the language used clearly differentiates between advice and guidance and requirements. The term 'must' suggests it is a compulsory requirement. The term 'could' suggests it is a recommendation only, and alternative approaches could be used.

### Guidance

Assessment Guidance provides suggestions on the types of evidence that learners could produce to cover the assessment criteria. Additional information is also provided to clarify what the evidence could cover.

The assessment guidance should illustrate how the assessment criteria could be met and provides an indication of the depth and breadth expected. This will assist in ensuring sufficiency of evidence.

The types of evidence that could be used are:

- Assessor records of observation
- Product evidence (insert description of product, eg 'annotated CV')
- Records of questioning (oral or written)
- Records of professional discussion
- Formal testing
- Projects or assignments
- Simulated activity
- Candidate and peer reports
- Evidence from others, ie witness testimonies.

One piece of evidence can cover a number of assessment criteria.

Learners can produce other types of evidence as long as the assessment criteria are covered and the evidence generated can be internally and externally verified. To help in determining the best assessment method, Appendix 4 lists the chosen/proven assessment methods with advantages and disadvantages of each.

Assessment guidance wouldn't be provided for units which are assessed via external assessment only.

If you're writing assessment guidance, you need to make sure that you give suggestions for all of the assessment criteria. Please give as much information as possible to help you create an assessment approach which is userfriendly. We encourage innovation, so you might like to mention things like video/photographic evidence and that portfolios don't have to be paper-based. Again, if you're uncertain if what you're suggesting is appropriate, we can discuss this with you.

**Example 1:****Simulated Activity**

**Types of evidence:** A series of role plays/simulations in which candidates experience or overcome communication barriers or put into practice active listening skills

**Assessment Criteria:** 1.1, 1.2, 1.3

**Additional information:** Role plays could involve background noise and differences in seating arrangements, proximity and eye contact. Sensory impairments may be simulated to provide insights as to how these can act as barriers to communication.

**Example 2:****Candidate Report**

**Types of evidence:** Candidate report

**Assessment Criteria:** 1.4, 1.5, 1.6

**Additional information:** Report on ground handling companies and their role: this report should contain a minimum of 250 words.

## Section 9

# Choosing the right assessment method

The various factors that should be taken into consideration when designing assessment are listed at Appendix 5.

### Assessment Methods

You're required to develop assessment methods that:

- are consistent with the requirements of the unit
- enable the unit to be assessed individually
- assess validly the skills, knowledge and / or understanding of all learning outcomes against the stated assessment criteria
- require the production of sufficient evidence from learners to enable reliable and consistent judgements to be made about the achievement of all the learning outcomes against the stated assessment criteria
- are manageable, cost effective and/or permit manageable and cost effective assessment arrangements to be developed by centres.

Type of Assessment	Examples
Not under examination conditions; evidence collected over time	<ul style="list-style-type: none"> <li>• Portfolio of evidence</li> <li>• Coursework</li> <li>• Work based observations</li> <li>• Oral / written questions</li> <li>• Assignments</li> <li>• Projects</li> <li>• Practical demonstration</li> <li>• Role play</li> <li>• Simulation</li> </ul>
Not under examination conditions; specially arranged discussions	<ul style="list-style-type: none"> <li>• Individual interview</li> <li>• Panel interview</li> <li>• Professional discussion</li> <li>• Oral questions</li> </ul>
Examination conditions; speaking and listening skills tests	<ul style="list-style-type: none"> <li>• Oral test</li> <li>• Aural test</li> </ul>
Examination conditions; written questions	<ul style="list-style-type: none"> <li>• Multiple-choice question papers</li> <li>• Essay</li> <li>• Short answer papers</li> <li>• Online testing</li> </ul>

### Assessment Specifications

These stipulate how the chosen assessment methods will be implemented.

Type of Assessment Specifications	Examples
Work based observation	<ul style="list-style-type: none"> <li>• Range of applications for which learners must provide evidence</li> <li>• Type and / or amount of evidence that the learners must provide</li> </ul>
Portfolio of evidence (can be developed as part of a taught Customised Qualification)	<ul style="list-style-type: none"> <li>• Worksheets</li> <li>• Project / Task / Assignment brief</li> <li>• Coursework</li> </ul>
Multiple Choice Question Papers	<ul style="list-style-type: none"> <li>• Number of questions</li> <li>• Distribution of questions across unit content</li> <li>• Time allowed for learners to complete the paper</li> <li>• Statistical characteristics required of mark distribution</li> </ul>
Written papers (essay and short answer questions)	<ul style="list-style-type: none"> <li>• Number of questions</li> <li>• Distribution of questions across unit content</li> <li>• Time allowed for learners to complete the paper</li> <li>• Mark scheme for paper</li> </ul>

### Assessment Instruments

These stipulate how the chosen assessment methods will be implemented.

Type of Assessment Specifications	Examples
Work based observation	<ul style="list-style-type: none"> <li>• Guidance provided to learners and assessors on the preparation and assessment of portfolios</li> </ul>
Multiple Choice Tests	<ul style="list-style-type: none"> <li>• Individual question papers</li> <li>• Content, software and hardware for e-delivery</li> </ul>
Written papers (essay and short answer questions)	<ul style="list-style-type: none"> <li>• Individual question papers and their mark schemes</li> <li>• Content, software and hardware for e-delivery</li> </ul>

## Section 10

### Developing units at level 4 and above

#### Higher Levels - Definition

The national framework identifies nine levels of achievement, from Entry level through levels 1 to 8. Levels 4 to 8 are equivalent in challenge to levels 4 to 8 of the Framework for Higher Education Qualifications (England, Wales and Northern Ireland) (FHEQ). In the context of this section 'higher level' refers to levels 4 to 8 of the national framework.

#### Subject Benchmarks

The responsibility for academic standards and quality in UK higher education rests with individual universities and colleges, each of which is independent and self governing. Quality Assurance Agency (QAA) checks how well they meet their responsibilities, identifying good practice and making recommendations for improvement. They also publish guidelines to help institutions develop effective systems to ensure students have high quality experiences.

QAA has published subject benchmark statements for a range of disciplines to set out clearly the academic characteristics and standards of UK high level programmes. Some benchmark statements combine or make reference to professional standards required by external professional or regulatory bodies in the discipline.

Subject benchmark statements set out expectations about standards of high level Customised Qualifications in a range of subject areas. They describe what gives a discipline its coherence and identity, and define what can be expected of a learner in terms of the abilities and skills needed to develop understanding or competence in the subject.

They are intended to assist those involved in programme design, delivery and review. They may also be of interest to prospective students and employers, seeking information about the nature and standards of Customised Qualifications in a subject area. The link to QAA's benchmark statements are below:

<http://www.qaa.ac.uk/assuringstandards-and-quality/the-qualitycode/subject-benchmark-statements>

#### Factors influencing the development of bespoke units at higher levels

The following factors may influence the development of bespoke units at higher levels. There's no suggestion that these factors influence all higher level units, simply that they're more likely to have an impact on units at levels 4 to 8 than units at lower levels:

- units at higher levels within the QCF are less likely to be developed on the basis of occupational standards (as the majority of these standards relate to lower levels of achievement within the national framework)
- units at higher levels are more likely to be related to standards set by professional bodies and/or associations as these bodies have a clearer remit for standards development at these higher levels
- the learning outcomes and assessment criteria for units at higher levels are more likely to be based on knowledge or understanding, than on the development of skills
- units at higher levels are more likely to be assessed through assignments, examinations and tests rather than through assessment of performance in the workplace

Each of these possible influences is now considered in turn in developing guidance for the development of units at higher levels.

### **Learning outcomes and assessment criteria**

Within Ofqual's level descriptors it's possible to detect a gradual shift away from practical skills based on physical actions at lower levels towards more cerebral knowledge based on mental actions as one moves to the higher levels. As the basis of the level descriptors reflects a hierarchy of skills and knowledge (Bloom's Taxonomy of Learning is a source for these at Appendix 4) this gradual shift in focus is reflected as you move up the levels.

One possible impact of this shifting focus across different levels is that it becomes more difficult to develop precise and easily measurable learning outcomes and assessment criteria at higher levels of achievement. There's a danger that assessment criteria at higher levels either become repetitive, or that they fail to establish an explicit assessment standard for the unit. There are now examples of higher level units that use a variety of different assessment criteria to establish a clear assessment standard for the unit on the Ofqual register.

### **Assessment**

Although the method of assessment isn't a technical feature of the unit, evidence suggests that some organisations are developing units to be assessed exclusively through tests or examinations. Such units developed at higher levels are more likely to assess the development of knowledge and/ or understanding rather than the acquisition of skills. However, it should also be noted that the requirements for assessment of such units are exactly the same as for other levels: all the learning outcomes of the unit must be achieved to the required assessment standard in order to achieve that unit.

### **Levels**

Although the national framework is based on nine levels of achievement, evidence suggests that it's actually more difficult to establish meaningful distinctions between units at higher levels of the framework. In other words, although the distinctions between the first 4 levels of achievement (Entry level to level 3) are based on qualitatively different and easily observable distinctions in the actions of learning, distinctions between the top 5 levels are derived from distinctions between years of study in higher education.

It's possible that the reason why it becomes practically more difficult to distinguish between levels of achievement as one proceeds up the levels is that the distinctions between levels 4 to 8 are theoretically less easy to establish. Although the levels are nearly always presented as a neat and even set of 'stages' in a hierarchy of achievements, perhaps in reality these stages get progressively 'narrower' as one goes up through the levels.

# Appendix 1

## Ofqual<sup>©</sup>'s Level Descriptors

Level	Summary	Knowledge and understanding	Application and action	Autonomy and accountability
Entry Level	<b>Entry 1 recognises progress along a continuum that ranges from the most elementary of achievements to beginning to make a use of skills, knowledge or understanding that relate to the immediate environment.</b>			
	Achievement at Entry 2 reflects the ability to make use of skills, knowledge and understanding to carry out simple, familiar tasks and activities with guidance.	Use knowledge or understanding to carry out simple, familiar activities. Know the steps needed to complete simple activities.	Carry out simple, familiar tasks and activities Follow instructions or use rehearsed steps to complete tasks and activities.	With appropriate guidance begin to take some responsibility for the outcomes of simple activities. Actively participate in simple and familiar activities.
	Achievement at Entry 3 reflects the ability to make use of skills, knowledge and understanding to carry out structured tasks and activities in familiar contexts, with appropriate guidance where needed.	Use knowledge or understanding to carry out structured tasks and activities in familiar contexts. Know and understand the steps needed to complete structured tasks and familiar activities.	Carry out structured tasks and activities in familiar contexts. Be aware of the consequences of actions for self and others.	With appropriate guidance take responsibility for the outcomes of structured activities. Actively participate in activities in familiar contexts.
Level 1	Achievement at Level 1 reflects the ability to use , relevant knowledge, skills and procedures to complete routine tasks. It includes responsibility for completing tasks and procedures subject to direction or guidance.	Use knowledge of facts, procedures and ideas to complete well-defined, routine tasks. Be aware of information relevant to area of study or work.	Complete well-defined routine tasks. Use relevant skills and procedures. Select and use relevant information. Identify whether actions have been effective.	Take responsibility for completing tasks and procedures subject to direction or guidance as needed.

Level	Summary	Knowledge and understanding	Application and action	Autonomy and accountability
Level 2	Achievement at Level 2 reflects the ability to select and use relevant knowledge, ideas, skills and procedures to complete well-defined tasks and address straightforward problems. It includes taking responsibility for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance.	Use understanding of facts, procedures and ideas to complete well-defined tasks and address straightforward problems.	Complete well-defined, generally routine tasks and address straightforward problems. Select and use relevant skills and procedures. Identify, gather and use relevant information to inform actions. Identify how effective actions have been.	Take responsibility for completing tasks and procedures. Exercise autonomy and judgement within limited parameters.
Level 3	Achievement at Level 3 reflects the ability to identify and use relevant understanding, methods and skills to complete tasks and address problems that, while defined, have a measure of complexity. It includes taking responsibility for initiating and completing tasks and procedures as well as exercising autonomy and judgement within limited parameters. It also reflects awareness of different perspectives or approaches within an area of study or work.	Use factual, procedural and theoretical understanding to complete tasks and address problems that, while well defined, may be complex and none routine. Interpret and evaluate relevant information and ideas. Be aware of the nature of the area of study or work. Have awareness of different perspectives or approaches within the area of study or work.	Address problems that, while well defined, may be complex and non-routine. Identify, select and use appropriate skills, methods and procedures. Use appropriate investigation to inform actions. Review how effective methods and actions have been.	Take responsibility for initiating and completing tasks and procedures, including, where relevant, responsibility for supervising or guiding others. Exercise autonomy and judgement within limited parameters.

Level	Summary	Knowledge and understanding	Application and action	Autonomy and accountability
Level 4	Achievement at Level 4 reflects the ability to identify and use relevant understanding, methods and skills to address problems that are well-defined but complex and non-routine. It includes taking responsibility for overall Customised Qualifications of action as well as exercising autonomy and judgement within fairly broad parameters. It also reflects understanding of different perspectives or approaches within an area of study or work.	<p>Use practical, theoretical or technical understanding to address problems that are well-defined but complex and non-routine.</p> <p>Analyse, interpret and evaluate relevant information and ideas.</p> <p>Be aware of the nature and approximate scope of the area of study or work.</p> <p>Have an informed awareness of different perspectives or approaches within the area of study or work.</p>	<p>Address problems that are complex and non-routine while normally fairly well-defined.</p> <p>Identify, adapt and use appropriate skills and methods.</p> <p>Initiate and use appropriate investigation to inform actions.</p> <p>Review the effectiveness and appropriateness of methods, actions and results.</p>	<p>Take responsibility for Customised Qualifications of actions, including, where relevant, responsibility for the work of others.</p> <p>Exercise autonomy and judgement within broad but generally well-defined parameters.</p>
Level 5	Achievement at Level 5 reflects the ability to identify and use relevant understanding, methods and skills to address broadly-defined, complex problems. It includes taking responsibility for planning and developing Customised Qualifications of action as well as exercising autonomy and judgement within broad parameters. It also reflects understanding of different perspectives, approaches or schools of thought and the reasoning behind them.	<p>Use practical, theoretical or technical understanding to find ways forward in broadly defined, complex contexts.</p> <p>Analyse, interpret and evaluate relevant information, concepts and ideas.</p> <p>Be aware of the nature and scope of the area of study or work.</p> <p>Understand different perspectives, approaches or schools of thought and the reasoning behind them.</p>	<p>Address broadly defined, complex problems.</p> <p>Determine, adapt and use appropriate methods and skills.</p> <p>Use relevant research or development to inform actions.</p> <p>Evaluate actions, methods and results.</p>	<p>Take responsibility for Customised Qualifications of actions, including, where relevant, responsibility for the work of others.</p> <p>Exercise autonomy and judgement within broad but generally well-defined parameters.</p>

Level	Summary	Knowledge and understanding	Application and action	Autonomy and accountability
Level 6	<p>Achievement at level 6 reflects the ability to refine and use relevant understanding, methods and skills to address complex problems that have limited definition. It includes taking responsibility for planning and developing Customised Qualifications of action that are able to underpin substantial change or development, as well as exercising broad autonomy and judgement. It also reflects and understanding of different perspectives, approaches or schools of thought and the theories that underpin them.</p>	<p>Refine and use practical, conceptual or technological understanding to create ways forward in contexts where there are many interacting factors.</p> <p>Critically analyse, interpret and evaluate complex information, concepts and ideas.</p> <p>Understand the context in which the area of study or work is located.</p> <p>Be aware of current developments in the area of study or work.</p> <p>Understand different perspectives, approaches or schools of thought and the theories that underpin them.</p>	<p>Address problems that have limited definition and involve many interacting factors.</p> <p>Determine, refine, adapt and use appropriate methods and skills.</p> <p>Use and, where appropriate, design relevant research and development to inform actions.</p> <p>Evaluate actions, methods and results and their implications.</p>	<p>Take responsibility for planning and developing Customised Qualifications of action that are capable of underpinning substantial changes or developments.</p> <p>Initiate and lead complex tasks and processes, taking responsibility, where relevant, for the work and roles of others.</p> <p>Exercise broad autonomy and judgement.</p>

Level	Summary	Knowledge and understanding	Application and action	Autonomy and accountability
Level 7	<p>Achievement at level 7 reflects the ability to reformulate the use relevant understanding, methodologies and approaches to address problematic situations that involve many interacting factors. It includes taking responsibility for planning and developing Customised Qualifications of action that initiate or underpin substantial change or development, as well as exercising broad autonomy and judgement. It also reflects an understanding of relevant theoretical and methodological perspectives, and how they affect their area of study or work.</p>	<p>Reformulate and use practical, conceptual or technological understanding to create ways forward in contexts where there are many interacting factors.</p> <p>Critically analyse, interpret and evaluate complex information, concepts and theories to produce modified conceptions.</p> <p>Understand the wider contexts in which the area of study or work is located.</p> <p>Understand current developments in the area of study or work.</p> <p>Understand different theoretical and methodological perspectives and how they affect the area of study or work.</p>	<p>Conceptualise and address problematic situations that involve many interacting factors.</p> <p>Determine and use appropriate methodologies and approaches.</p> <p>Design and undertake research, development or strategic activities to inform the area of work or study, or produce organisational or professional change.</p> <p>Critically evaluate actions, methods and results and their short and long-term implications.</p>	<p>Take responsibility for planning and developing Customised Qualifications of action the initiate or underpin substantial changes or developments.</p> <p>Exercise broad autonomy and judgement across a significant area of work or study.</p> <p>Initiate and lead complex tasks and processes, taking responsibility, where relevant, for the work and roles of others.</p>

## Appendix 2

### Sections of a completed unit (Ofqual<sup>©</sup>)

#### Unit 01

##### Context and principles for early years provision (regulators' accredited unit no. J/500/9821)

To familiarise practitioners with the requirements and principles of the early years framework within which they work.

##### Unit 1 Context and principles for early years provision (J/500/9821)

###### The learner will:

- 1 Understanding the purpose and function of the Early Years Foundation Stage frameworks in supporting provision

###### The learner can:

- 1.1 Identify the position and legal status of the Early Years Foundation Stage framework
- 1.2 Explain how the relevant Early Years Foundation Stage framework links to the National Curriculum or its equivalent
- 1.3 Describe the principles and implementation of the Early Years Foundation Stage framework, and how national guidance materials are used in settings

##### Internal Assessment - Unit 01:

###### Type of evidence: product - informative poster

**Assessment criteria:** Unit 01: 1.1, 1.2, 1.3 Unit 02: 1.1, 1.2

**Additional information:** The poster (which might be accessed by colleagues and/or families) should identify the principles and purpose of the EYFS framework, how it is used in the setting and link to the National Curriculum.

###### Type of evidence: reflective account

**Assessment criteria:** Unit 01: 2.1, 2.2, 2.3, 2.4

**Additional information:** The reflective account should include evaluation of the current strengths of inclusive practice in the setting and also identify areas for development and how these might be addressed.

###### Type of evidence: case study

**Assessment criteria:** Unit 01: 3.1, 3.2, 3.3, 3.4, 3.5, 3.6

**Additional information:** This should be based on a series of short observations in the work setting which track the progress of an individual child - who has either just started in the setting or is about to move to another room or setting. The child should be observed as s/he is engaged in a range of activities indoors and out, including out-of-setting. An evaluation of the setting's resources and organisation of the environment should be completed which show how these support the child intellectually, socially and emotionally. The child's 'next steps' should be identified.

## Appendix 3

### Bloom's taxonomy in the cognitive, affective and psychomotive domains

Cognitive domain				
Level	Category	Activity	Types of assessment	Verbs/key words
1	Knowledge	Recall, recognition of information.	Multiple-choice test, recount facts or statistics, recall a process, rules, definitions; quote law or procedure.	Arrange, define, demonstrate, give examples of..., identify, indicate, locate, outline, use, describe, label, list, memorise, recognise, relate, reproduce, select, state.
2	Understanding	Understand meaning, re-state data in one's own words, interpret.	Explain or interpret meaning from a given scenario or statement, suggest action, reaction or solution to given problem, create examples.	Apply, compare, define, demonstrate, describe, differentiate, estimate, explain, reiterate, reword, classify, summarise, illustrate, translate, review, report, discuss, re-write, estimate, interpret, paraphrase.
3	Application	Use or apply knowledge, put theory into practice, use knowledge in response to real circumstances.	Put a theory into practice, demonstrate, solve a problem, manage an activity.	Analyse, apply, clarify, critically compare, differentiate, distinguish, estate, evaluate, explain, use, apply, discover, manage, execute, solve, produce, implement, construct, change, prepare, conduct, perform, react, respond, role-play.
4	Analysis	Interpret elements, organizational principles, structure, construction, internal relationships; quality, reliability of individual components.	Identify constituent parts and functions of a process or concept, or de-construct a methodology or process, making qualitative assessment of elements, relationships, values and effects; measure requirements or needs.	Analyse, break down, catalogue, compare, quantify, measure, test, examine, experiment, relate, graph, diagram, plot, extrapolate, value, divide.

Cognitive domain				
Level	Category	Activity	Types of assessment	Verbs/key words
5	Synthesis	Develop new unique structures, systems, models, approaches, ideas; creative thinking, operations.	Develop plans or procedures, design solutions, integrate methods, resources, ideas, parts; create teams or new approaches, write protocols or contingencies.	Develop, plan, build, create, design, organise, revise, formulate, propose, establish, assemble, integrate, re-arrange, modify.
6	Evaluation	Assess effectiveness of whole concepts, in relation to values, outputs, efficacy, viability; critical thinking, strategic comparison and review; judgement relating to external criteria.	Review strategic options or plans in terms of efficacy, return on investment or cost-effectiveness, practicability; assess sustainability, produce a financial justification for a proposition or venture, calculate the effects of a plan or strategy; perform a detailed risk analysis with recommendations and justifications.	Review, justify, assess, present a case for, defend, report on, investigate, direct, appraise, argue, project-manage.

Affective domain				
Level	Category	Activity	Types of assessment	Verbs/key words
1	Receive	Internalize or characterise values.	listen to teacher or trainer, take interest in session or learning experience, take notes, turn up, make time for learning experience, participate passively.	ask, listen, focus, attend, take part, discuss, acknowledge, hear, be open to, retain, follow, concentrate, read, do, feel.
2	Respond	react and participate actively.	participate actively in group discussion, active participation in activity, interest in outcomes, enthusiasm for action, question and probe ideas, suggest interpretation.	react, respond, seek clarification, interpret, clarify, provide other references and examples, contribute, question, present, cite, become animated or excited, help team, write, perform.
3	Value	attach values and express personal opinions.	decide worth and relevance of ideas, experiences; accept or commit to particular stance or action.	argue, challenge, debate, refute, confront, justify, persuade, criticise.
4	Organise or Conceptualise values	reconcile internal conflicts; develop value system.	qualify and quantify personal views, state personal position and reasons, state beliefs.	build, develop, formulate, defend, modify, relate, prioritise, reconcile, contrast, arrange, compare.
5	Internalise or characterise values	adopt belief system and philosophy.	self-reliant; behave consistently with personal value set.	act, display, influence, solve, practice.

Psychomotor domain				
Level	Category	Activity	Types of assessment	Verbs/key words
1	Imitation	copy action of another; observe and replicate.	watch teacher or trainer and repeat action, process or activity.	copy, follow, replicate, repeat, adhere.
2	Manipulation	reproduce activity from instruction or memory.	carry out task from written or verbal instruction.	re-create, build, perform, execute, implement.
3	Precision	execute skill reliably, independent of help.	perform a task or activity with expertise and to high quality without assistance or instruction; able to demonstrate an activity to other learners.	demonstrate, complete, show, perfect, calibrate, control.
4	Articulation	adapt and integrate expertise to satisfy a non-standard objective.	relate and combine associated activities to develop methods to meet varying, novel requirements.	construct, solve, combine, coordinate, integrate, adapt, develop, formulate, modify, master.
5	Naturalization	automated, unconscious mastery of activity and related skills at strategic level.	define aim, approach and strategy for use of activities to meet strategic need.	design, specify, manage, invent, project-manage.

## Appendix 4

### Assessment Type - Advantages and Disadvantages

Assessment Type	Advantages	Disadvantages
Portfolio	<ul style="list-style-type: none"> <li>• allows ongoing evidence generation</li> <li>• range of evidence types means that it can cover theory and practical</li> <li>• can be personal to the learner</li> <li>• is a proven, established, formative method</li> <li>• less threatening for the learner</li> <li>• tutors used to this method and deliver units or learning outcomes holistically and innovatively</li> <li>• suits distance learning as learners complete workbook on own.</li> </ul>	<ul style="list-style-type: none"> <li>• expensive</li> <li>• time consuming to set up</li> <li>• clients may find it difficult to build a portfolio if they're not used to this</li> <li>• it can be difficult to get portfolios for standardisation</li> <li>• if the Customised Qualification is a short Customised Qualification and you don't have Direct Claim Status, you may be required to keep portfolios for a long period of time before they can be QV'd.</li> </ul>
True/False Questions	<ul style="list-style-type: none"> <li>• easy to write, and can be scored electronically</li> </ul> <p>Most Appropriate For:</p> <ul style="list-style-type: none"> <li>• recall of factual information</li> <li>• information that's "either/or" in nature.</li> </ul>	<ul style="list-style-type: none"> <li>• assess recognition of information, rather than recall</li> <li>• are limited in the kinds of learning that can be assessed</li> <li>• there's a 50% chance the learner will guess the correct answer.</li> </ul>
Multiple Choice Questions (MCQs)	<ul style="list-style-type: none"> <li>• the most versatile of the closed-ended question formats</li> <li>• probability of the learner guessing the correct answer is lower than for true/false questions</li> <li>• instant results and feedback</li> <li>• can reuse bank of questions</li> <li>• is a proven, established, summative method</li> <li>• easy to use with an online system</li> <li>• easy re-sits</li> <li>• suits distance learning providing the learners can do it remotely, ie in the spirit of 'distance learning'</li> <li>• Easier for learners to complete and they have a 25% chance of getting the answer correct.</li> <li>• Most appropriate for factual, conceptual, or procedural information.</li> </ul>	<ul style="list-style-type: none"> <li>• assess recognition of information rather than recall</li> <li>• 'test' can be a threat to learners</li> <li>• question writing can be ambiguous if subject is not 'black and white'</li> <li>• cost of spot checks?</li> <li>• centre has to train and use Invigilators</li> <li>• limited to particular qualifications as doesn't suit all.</li> </ul>

Assessment Type	Advantages	Disadvantages
Short Answer Questions (SAQs)	<ul style="list-style-type: none"> <li>• assess unassisted recall of information rather than recognition of information</li> <li>• easier to write than essay questions</li> <li>• is a proven, established, summative method</li> <li>• suitable for higher level Customised Qualification</li> <li>• can test learners' knowledge in depth</li> <li>• scope to amend mark scheme if learner has provided an answer that hasn't been thought of.</li> <li>• Most appropriate for committed information to memory.</li> </ul>	<ul style="list-style-type: none"> <li>• only suitable for questions that can be answered with short responses</li> <li>• can lead to difficulties in marking if the question isn't worded carefully</li> <li>• 'test' can be a threat to learners</li> <li>• cost of spot checks?</li> <li>• centre has to train and use Invigilators</li> <li>• marking process and standardisation need to be rigorous and it can take more time for the Examiners to come to an agreement</li> <li>• appeals and enquiries about results take a lot of time to investigate.</li> </ul>
Assignment (timed)	<ul style="list-style-type: none"> <li>• learners are aware of the timescale for completion</li> <li>• can test learners' knowledge in depth</li> <li>• scope to amend mark scheme if learner has provided an answer that hasn't been thought of</li> <li>• not always exam conditions.</li> </ul>	<ul style="list-style-type: none"> <li>• 'test' can be a threat to learners</li> <li>• marking process and standardisation need to be rigorous and it can take more time for the Examiners to come to an agreement.</li> </ul>
Assignment (not timed)	<ul style="list-style-type: none"> <li>• less of a threat if not timed</li> <li>• not always exam conditions</li> <li>• scope to amend mark scheme if learner has provided an answer that hasn't been thought of.</li> </ul>	<ul style="list-style-type: none"> <li>• write, check, standardise? (ie do the costs reflect the benefits to you, clients and learners?)</li> <li>• Marking process and standardisation need to be rigorous and it can take more time for the Examiners to come to an agreement.</li> </ul>
Case Study	<ul style="list-style-type: none"> <li>• can be seen or unseen</li> <li>• unseen – real test as the learner has to know all aspects of the topic the case study's about</li> <li>• seen – learner can focus revision on certain aspects the case study covers.</li> </ul>	<ul style="list-style-type: none"> <li>• if seen, tendency to discuss it with friends so is it really a true reflection of a learner's ability?</li> <li>• write, check, standardise? (ie do the costs reflect the benefits to you, clients and learners?)</li> <li>• marking process and standardisation need to be rigorous and it can take more time for the Examiners to come to an agreement.</li> </ul>

Assessment Type	Advantages	Disadvantages
Essay Questions	<ul style="list-style-type: none"> <li>• allow learners to express their thoughts and opinions in writing, giving a clearer picture of their level of understanding</li> <li>• assess recall of information rather than recognition.</li> <li>• Most appropriate for:</li> <li>• assessing the ability to process more complex information.</li> </ul>	<ul style="list-style-type: none"> <li>• time consuming for learners to complete</li> <li>• clear instructions are needed</li> <li>• marking can be difficult because of the variety of answers that can be given</li> <li>• learners could be marked on the basis of their writing skills rather than knowledge and understanding of the content</li> <li>• open to plagiarism.</li> </ul>
Observation	<ul style="list-style-type: none"> <li>• most appropriate to be able to make judgements about a learner's performance or piece of creative work</li> <li>• can be formative or summative</li> <li>• useful for practical based Customised Qualification, eg performance skills – 'assess as you watch' idea</li> <li>• nothing additional for the learner as they'll be doing the performance anyway</li> <li>• Most appropriate for :</li> <li>• practical application of theory and method</li> <li>• creative interpretation of source material.</li> </ul>	<ul style="list-style-type: none"> <li>• marking can be seen as subjective and the criteria for making assessment decisions needs to be carefully thought out</li> <li>• Internal Moderator (IM) needs to see performance</li> <li>• lack of observation records available</li> <li>• needs to be captured in some way, sometimes video is only option for IM/QV/QA which causes issues over extra requirements for you and issues over quality</li> <li>• in a group performance/creative work it can be difficult to assess an individual learner's contribution.</li> </ul>
Simulation	<ul style="list-style-type: none"> <li>• simulation of an actual process can be a useful tool to aid learning.</li> <li>• Most appropriate for :</li> <li>• testing a learner's skill in doing something.</li> </ul>	<ul style="list-style-type: none"> <li>• can be costly both in staff time and the cost of appropriate equipment.</li> </ul>

## Appendix 5

### Assessment Type - Advantages and Disadvantages

Fit for purpose – not one size fits all	<p>The content of the Customised Qualification will help determine the best way it should be assessed. If the Customised Qualification is very theory based and you need to assess the learner’s knowledge of a subject – you may decide to assess the learner using a test.</p> <p>If the Customised Qualification on the other hand requires practical demonstration and/or is very personal to the learner – a test may not be the most appropriate way of assessing and a portfolio of evidence may be better suited. This will allow learners to demonstrate their practical evidence and include the personal aspects.</p>
Writers’ ideas	Sector experts, who are used to write and develop the Customised Qualification, are likely to be the best people to give advice on the way in which a Customised Qualification should be assessed.
Client research	During the research phase of a Customised Qualification you may want to ask clients how they think a Customised Qualification of that kind should be assessed. For example you could send out a survey questionnaire giving clients a choice of different assessment types – that way you can analyse the survey results to identify their preferred choice.
Competitor award or other NCFE qualifications	It may be helpful to look at a competitor Customised Qualification to see how it’s assessed – this may give you the ideal assessment to use with your own Customised Qualification or it may give you an indication of something you don’t want to do. Looking at NCFE qualifications is also a good starting point as we may have an existing assessment method that’d work perfectly.
Total Qualification Time (TQT)	The size of the Customised Qualification is also something that should be considered. If the Customised Qualification is very short, assessing it via a portfolio of evidence may cause problems for clients/learners. Centres often run short Customised Qualifications on a roll on, roll off basis so organising moderation visits to sample portfolios for a 10 hour Customised Qualification can be problematic.
Cost	Some assessment methods are cheaper than others. NCFE uses an online system for testing with Multiple Choice Questions (MCQ) and the costs associated with this are low. Portfolio of evidence on the other hand is the opposite – no set up costs (if external recruitment is not needed) but ongoing costs for Moderator fees and expenses to cover the centre’s entitled visits.

E-learning and distance learning considered	If the Customised Qualification is ideal for e-learning or distance learning this may affect the assessment method chosen. For example if distance learning is likely to be used, choosing an assignment that has to be sat under exam conditions in the centre may cause problems for learners. Similarly if you want to use e-learning or online assessment for a practical Customised Qualification, you may have to consider allowing another way of assessing the practical skills.
Innovative	Some Customised Qualifications really lend themselves to being assessed in a different way. Our Enterprise qualification is an example of this. When deciding on the assessment method or writing the assessment guidance, as well as choosing something that's fit for purpose, try and select something that's different, fun and engaging for learners.
Can be used by Assessors & Moderators	Although you want to be innovative, you still have to select something that's manageable for Assessors and Moderators. There's no point in creating something too unusual as this may create additional resource requirements for the Assessor. Something too extravagant may also cause problems for NCFE Quality Verifiers (QVs).
Is it assessing knowledge, skills or practical	The purpose of each unit and the overall Customised Qualification will help determine the assessment method. For example, if it's a sport Customised Qualification there may be theory aspects for which the knowledge needs to be assessed. There may also be practical aspects for which the learner's practical application should be assessed. In this case you could either choose 2 assessment methods; MCQ and portfolio. Or you could chose portfolio only and write specific assessment guidance on the types of evidence the learner must produce.
Threat to learners	You should also consider the target group of the Customised Qualification when deciding on the assessment method. If the Customised Qualification is at a low level and will be primarily undertaken by learners who for example are disengaged, have no other qualifications or have been excluded from the education system, then perhaps a 3 hour test to assess the qualification may not be the best way to engage this type of learner.

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