

Assessment Planning Form

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A. Overview

1. Date plan initiated

2. Assessment team members and their role(s)

Role	Name
Project coordinator	
Data gathering	
Data analysis	
Intervention facilitator	
Instructional designer	
Report writer	
Report presenter	
Other	

3. Area

Campus/Organization	
Department/Unit	

4. Level of assessment

Check all that apply

Organization/Campus-wide	
Department/Program-wide	
Course/Cohort-level	
Other	

5. Stakeholders

Check all that apply

Learners	
Instructors/trainers	
Administrators/managers	
Directors/executives	
Constituents	
Other (Please specify.)	



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6. Diversity, equity, and inclusion

In what ways and to what extent have diverse stakeholders had input in this assessment practice and framing?

In what ways and to what extent will diverse stakeholders have equitable access to instruments, data, and results of this assessment practice?

Will/Can reasonable accommodations be made for all stakeholders in this assessment practice?

7. Purpose for the assessment instrument***Check all that apply***

Needs assessment and analysis

Pre- and post-measurement of program impact

Individual development

Team development

Coaching

Selection

Re-entry

Career/academic advising

Other (Please specify.)

8. Learning outcome(s), objective(s), goal(s) (Be as specific as possible)

In what ways have expected learner outcomes taken account of diverse learner needs and recourses, providing equitable opportunities to learn and perform or demonstrate competence?



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B. Criteria for Assessment Tool Decision-Making

1. Funding	No/ Yes	Recommendation	
Do you have funds to spend on assessment?	No	Use a free assessment.	
	Yes	Consider a proprietary instrument and/or paid support for assessment.	
		If yes, what is the cost per person for the assessment?	
		What is the cost per person for certification for administering the assessment?	
		Are there additional fees for processing the results?	
		Will all stakeholders have equitable access to the associated fees for instruments, data, and results?	
		Does funding matter to you and your stakeholders?	

2. Statistics & Quality	Low/High	Recommendation
What is your comfort level with statistical analysis?	Low	A qualitative approach might be best, or a proprietary instrument that provides group reports.
	High	Surveys that require t-test analysis of pre-posttest data would work well.

Is the tool reliable—free from random error?

Is the tool methodologically valid--free from systemic, built-in error?
Content validity--Does it measure what it says it will measure?
Predictive validity--Can it help me learn about things I am interested in?
Convergent validity--Is it consistent with other similar measures?
Face validity--Does it seem to the participants as if it measures what it says it will measure?
Differential validity--Is it free from cultural bias?
Is it culturally, interpersonally, & relationally valid? Have you taken into account participants':
Culture
History
Location
Power
Voice
Relationship
Time
Plasticity
Reflexivity
Have you considered multiple lenses of validity?
Relational--The quality of the relationships that surround and infuse the evaluation process
Theoretical--The cultural congruence of theoretical perspectives underlying the program, the evaluation, and assumptions of validity
Methodological--The cultural appropriateness of epistemology and method (design, measurement tools, & procedures)

		No/Yes	Recommendation
	Are you concerned about social desirability bias (<i>students/learners telling you what they think you want to hear</i>) or over-estimation of skills?	No	High face validity instruments are fine in this case.
		Yes	Choose a low face validity indirect instrument or a direct measure (rubric, for instance).
		No/Yes	
	Does the instrument measure social desirability?		
	Do statistics and quality of the instrument matter to you and your stakeholders?		

3. Research Models

How were items developed? Are they based on a well-recognized theory or model?	
What is the track record of this instrument with my audience?	
Are there research studies reporting results from using it with my typical audience?	
Are there publications suggesting approaches for using it?	
Relevance -- In what ways & to what extent were diverse cadres of stakeholders consulted & had input into this tool's development?	

	No/Yes	Recommendation
Are you interested in comparing data across programs or with peer institutions?	No	Don't worry about what is most commonly used.
	Yes	Consider a proprietary instrument for maximum comparability.
Do research and models matter to you and your stakeholders?		

4. Learner Experience

How long does it take for participants to complete the instrument?		
Is it available in the appropriate language for my group?		
Is the translation professional and accurate?		
Does it include sufficient information for participants to understand their profile, and to develop goals?		
Will all learners have equitable access to instruments & meaningful data/results?		
Will/Can reasonable accommodations be made for all stakeholders in this assessment practice?		
	No/Yes	
Will the students/learners have access to their assessment results? Does access support their learning?	No	Summative assessment such as pre-post testing or use of a rubric will work well.
	Yes	For assessment as pedagogy, choose a proprietary instrument that includes a learning plan.
Does learner experience matter to you and your stakeholders?	No/Yes	

5. Instructor/Administrator Experience		Add/Don't add	
Would you prefer to add an assessment to your curriculum or assess an assignment already included?	Add	Consider formative assessment, assessment as pedagogy, and pre-post testing.	
	Don't add	A rubric to assess student artifacts or behaviors would likely work best.	
Do I need to be certified/qualified to use it?			
What knowledge, skills, and attitudes do I need to master to use it effectively?			
Is it accompanied by support materials for the educator that include data on its development, strategies for communicating its results, & activities for enhancing learning based on results?			
To use the instrument ethically:			
Must I conduct coaching interviews?			
is it best used to gather aggregate data?			
Is it effective for pre-and post-testing?			
Is it effective for individual feedback without interviews?			
Will all instructors/administrators have equitable access to instruments and meaningful data/results?			
Will/Can reasonable accommodations be made for all stakeholders in this assessment practice?			
Is it possible to talk to other users about its effectiveness?			
Is information available on the usual consulting fees for conducting assessments using this instrument?			
Are there 360-degree versions?			
		No/Yes	Recommendation
Does educator/administrator experience matter to you and your stakeholders?		No/Yes	



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Are their instruments that meet the above criteria and are well aligned with your identified learning outcomes?	No	You might need to explore alternative frameworks (e.g., other AAC&U VALUE rubrics such as Global Learning) or even create your own measure of intercultural learning (e.g, simple, open-ended cultural knowledge questions for pre-post testing).
	Yes	Choose the best fit, or a combination of instruments.

C. Action Items

1. Tool Choices	What makes your choice(s) the best fit? How will you justify your decisions in your report or to anyone who asks?
Assessment Tools--Direct	
Assessment Tools--Indirect	

2. Timeline	
When will you administer assessments?	
What is the sequence of evidence gathering?	

3. Process for Data Analysis

Who will be responsible for collecting and analyzing your data?

What resources and/or preparation do you need to make your assessment plan work?

4. Reporting Systems

When and with whom will you meet to "close the loop" ? *By thinking through the implications of your assessment, including whether/to what extent your learners achieved learning outcomes, and if/how your program (and/or your assessment plan) should change next time as a result?*

Who will compile the report?

Who will present the report?

In what form(s) will the report be delivered?

What processes are in place to use this data for program improvement implementation system?

Other?

This assessment planning form was written by Chris Cartwright, MPA, EdD.

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