Sharing the Path

Developing a Common Understanding of Assessment

Two Models for Facilitation

Project READ Literacy Network
Waterloo-Wellington

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Two models for facilitation

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Contents

ABOUT THIS DOCUMENT
Overview

- TWO MODELS for developing a common understanding of assessment among Literacy and Basic Skills (LBS) agencies are outlined within this document.

- These models are based upon the experiences of Project READ Literacy Network and Simcoe County Literacy Network in facilitating a process for common assessment with their member agencies within their Network areas.

- Both models are presented in a HOW-TO fashion, offering meeting agendas, topics, group activities, facilitation tips, and other suggestions.

> • *The focus is upon FACILITATION of the process; that is,* ***helping key referral partners work together*** *to forge their own understanding of assessment, and* ***reach agreement*** *about how they'll deliver literacy training in their community*

- Readers are not given a definitive answer about what common assessment "looks like" or how it MUST or even SHOULD be applied in their area. Rather, they are encouraged to **work with key referral partners to develop strategies, products and "outcomes" around assessment to suit the needs of their specific communities**, and offered ideas for how to accomplish the task.

ABOUT THIS DOCUMENT
The Sections

- The FIRST SECTION, the **Introduction**, provides an **overview** of the project, processes, and results. It offers observations from the facilitators about challenges they faced in their respective meetings, their recommendations to others embarking upon the task of developing a common assessment process, and facilitation tips. Co-authors of this section are Marianne Paul and Robb MacDonald.

- The SECOND SECTION, **Model "A",** describes the facilitative process that was followed for developing a common understanding of assessment among literacy providers in Waterloo Region and Wellington County. The facilitator/writer is Marianne Paul, and the network is Project READ Literacy Network.

- The THIRD SECTION, **Model "B",** describes the facilitative process that was followed for developing a common understanding of assessment among literacy providers in Simcoe County and South Muskoka. The facilitator/writer is Robb MacDonald and the network is the Simcoe County Literacy Network.

- Sections describing the respective models consist of **step-by-step outlines of each process**, and the **product** or **outcome** that resulted from it.

ABOUT THIS DOCUMENT

How to Use

- Agencies delivering literacy training through Literacy and Basic Skills (LBS) are expected to develop a common understanding of assessment with their LBS key referral partners and their Literacy Service Plan (LSP) partners. This document offers two very different ways in which this may be done.

- Both models were developed with guidance from front-line literacy practitioners, and "put to the test" within the respective Network areas.

Two Models from which to Choose

- Networks and other interested groups are invited to "mix-and-match" the approaches and exercises offered in both models to facilitate the common assessment process in their own area. Readers may use or adapt the activities as best meets their needs.

- This document may be photocopied in part as required for use in workshops offered by Networks and LBS agencies with the express purpose of developing a common understanding of assessment among LBS agencies. Please credit the appropriate author and Network for materials used.

ABOUT MODEL "A"
Project READ Literacy Network

The Network

- **Project READ Literacy Network** serves Waterloo Region and Wellington County in Southern Ontario. The area is comprised of several communities, both rural and urban. **Waterloo Region** includes Kitchener, Waterloo, Cambridge, and the Townships of North Dumfries, Wilmot, Wellesley, and Woolwich. **Wellington County** includes the **City of Guelph**, encompassing as well South Wellington, part of Eramosa and the Guelph Townships, and **rural Wellington County**, covering 1000 square miles and including several small towns and villages. Waterloo Region and Wellington County have their own LSP Committees which, in general, meet separately. A diverse range of literacy programming is offered throughout the PRLNarea, delivered by all three sectors -- community-based, school board, and college. Although the needs and geographical make-up of Waterloo Region and Wellington County are very different, PRLN member agencies chose to participate together in the process of developing a common understanding of assessment.

The Set-up

- **Seven" common understanding of assessment" meetings** were held over a period of seven months. These included a **planning meeting, five "working meetings"** and a **follow-up meeting**. Each meeting lasted approximately **three hours.**

Planning is Key

- The planning meeting occurred at the start of the process, and invited experienced representatives from each LBS agency to participate in defining and planning the process. These plans became the basis for future meetings.

- The working meetings occurred over three months, with each session "hands-on," and exploring a specific theme identified during the planning meeting. Agencies were obligated to send a minimum of one front-line LBS representative to each working meeting, and were encouraged to send more, ideally one per community served and/or site.

- The follow-up meeting was held several months later, in October after the summer break, when programming had returned to "full strength." Attendance was expanded to include all front-line LBS staff that an agency could send. The purpose was to communicate the results of the working meetings to the full range of staff members who would be expected to implement them.

The Approach

- Participants focused upon how LBS agencies "fit together" with their key referral partners to better support adult students, particularly those in transition to other LBS agencies, and how assessment (referral, initial and exit) could serve this end.

- They worked to develop an overall consistency Network-wide so that assessment results, student learning, and goal pathways were clearly communicated, and the information was USED by the next-step agency as a platform upon which to build further learning.

- Participants began by looking at **overall processes and tools**, such as the **initial assessment** and **Training Plans**. They then narrowed their focus to the LBS levels and domains where their agencies **intersected, identifying and developing a common understanding of those skills** that would facilitate successful **student transition** from one agency to another upon referral.

The Product

- Throughout the course of the meetings, participants reached a series of "**agency agreements**" concerning assessment, and HOW it would be implemented at LBS agencies throughout Waterloo Region and Wellington County.

- These agreements were "formalized" and communicated through a document that was distributed to all **front-line LBS staff** in the Network-area, including **intake staff, assessors, instructors and program coordinators.**

- Each agency accepted responsibility for **implementing** the agreements as well as **communicating** them to new staff members.

- The LCPP Committees **oversee** the agreements and **evaluate their usefulness** through **performance indicators** (included in the agreement document) and by **monitoring referrals** among agencies.

ABOUT MODEL "B"
Simcoe County Literacy Network

The Network

- Simcoe County Literacy Network (SCLN) serves **Simcoe County** and **South Muskoka**. Like PRLN, SCLN caters to both rural and urban communities. Someof the communities within SCLN's jurisdiction include Midland, Alliston, Huntsville, Orillia, Barrie, and Bracebridge. SCLN's membership includes representation from school boards, Georgian College, community literacy councils, private trainers and community agencies.

The Set-up

- The SCLN common understanding of assessment (CUA) process involved **eight meetings** between February and October, with a summer break in July and August. The first meeting, like that of PRLN,wasa **planning meeting**, while the remaining seven were **working meetings**. Initially, 11literacy representatives were invited, but only ten (and one substitute) participated.

- All **geographic areas** were represented except for the Huntsville region. The project participants selected also represented the three sectors: community-based, school board and college.

- All of the meetings were held in Barrie, on Friday mornings between 9:30 am and 12:30 pm.

The Approach

- The participants identified at the planning meeting their two primary goals for the project. The first was a better and common understanding of the levels within the Learning Outcomes Matrix. The second was a better understanding of the initial assessment tools and resources used by the different agencies.

- The remainder of the process could be grouped into three phases. The first phase was an introduction to each agency's assessment processes and resources facilitated through individual presentations. The second phase, which lasted almost two meetings, was devoted to forming the working subgroups and identifying attainable goals.

Working Subgroups

- For the Communications group, this second phase resulted in adopting skills checklists already developed and using them as the basis for developing lists of assessment criteria for Reading and Writing.

- For the Numeracy subgroup, no skills checklists had been developed; therefore, the majority of their work would be directed toward developing these.

- During the final phase, the Communications subgroup collected various assessment materials and tools and compared them with the lists of assessment criteria and skills checklists. In a small group format, they identified different resources that they agreed corresponded to the lists of assessment criteria.

- During the same time, the Numeracy subgroup worked through each of the five levels to develop skills checklists and sample exercises to correspond to the checklists.

- At the end of the official project meetings, three additional literacy community presentations (Numeracy, Reading and Writing) were scheduled for late October and early November.

- The purpose of the meetings was to present the process and results to other literacy practitioners and to solicit their feedback.

The Product

- At the official conclusion of the project in early October, the two working subgroups had developed drafts of skills checklists and samples of assessment materials to correspond to the different Levels.

- The Communications subgroup also developed lists of assessment criteria for both Reading and Writing that could be used to help an assessor identify at what level a particular resource/sample might fit.

- Using the feedback from the three literacy community presentations, these checklists and lists of assessment criteria were then modified and are presented in this resource.

RECOMMENDATIONS

Involvement and Responsibility

- **Directly involve front-line staff in the process of developing a common understanding of assessment**.

- Include people who use learning outcomes in a **practical "hands-on" way on a regular basis - instructors ,coordinators ,assessors ,and intake staff**. Although managers (school principals, Executive Directors, etc.) will need to see the RESULTS of the process, they won't be using or implementing common assessment on a front-line basis themselves -- frontline staff will. Get their "buy-in" and active participation!

- **Ensure participants have been given the responsibility and authority to make decisions for their agency at the meetings**. The process becomes ineffective if participants are not speaking for their agency and/or site, and must go back to their managers to get approval for decisions that have been made at the meetings.

- **Ensure there is adequate agency representation**. If the decisions made about assessment will impact upon a specific site, program or agency, or if staff is expected to IMPLEMENT the decisions, then make sure representatives are involved in the process!

Plan for Planning!

- **Include steps at the beginning of the process where participants will decide what issues are important to them, and how they want to approach reaching a common understanding.**

- **Give participants the opportunity to define what reaching a " common understanding of assessment" means to them,** based upon the needs of their agency, clientele, and the Network wide area. Customize your approach!

Communication

- **Give participants responsibility for communicating the decisions throughout their agency**. Make "how to communicate decisions" about developing a common understanding of assessment part of the process.

- As a group, decide **strategies for disseminating key information throughout the Network area**, particularly concerning ACTIONS that will need to be taken to IMPLEMENT common assessment.

- **Communicate the overall results of the process to each person who will need to APPLY them** - whether he or she was a participant in the meetings or not.

- *Keep in mind that developing a common understanding of assessment isn't useful if the work done or agreements reached aren't put into practice!*

Scheduling

- Part of the initial planning process will be devoted to scheduling project meetings. Depending on the project goals, the length of meetings and the number of participants, **building in additional floater meetings that can be used to complete specific tasks could become very important**.

- For example, if the different agencies are going to present their assessment tools and resources, the facilitator may find that one meeting will not be enough. Therefore, she/he may want to **overestimate the amount of time required**. If the group completes the tasks sooner and the additional meetings are not required, that's just a project bonus!

- Holding one or more meetings at the end of the project may be a valuable way of **communicating the results of the project back to the agencies** (an official launch). As part of the presentations, agency representatives who did not participate in the meetings could be provided with the tangible products of the meetings (e.g., checklists or agreements).

Technology

- **Technology, especially e-mail , presents an excellent opportunity for communicating with the group**. However, the facilitator should ensure that flexibility is sufficient to accommodate individual preferences and **levels of techno comfort**. Some participants may work in WordPerfect while others use Word. Similarly, some may only want to receive information by fax.

Participant Homework

- Minimizing the amount of homework (and accompanying paper) that each member has to contend with could become very important during the project.

- Therefore, it is critical that project goals be clearly defined and articulated at the outset. If participants feel that the work they have done is wasted because the project's direction has changed halfway through, their motivation and commitment to the project will suffer.

Who's on the "Hook?"

- Include maintaining the common assessment agreements/decisions, and evaluating their implementation, as part of the process. It's important to identify WHO or WHICH GROUP will look after ensuring the agreements or decisions are "kept alive", and HOW this will be accomplished.

- One approach is to establish performance indicators that are tracked over time, with the results interpreted and used as the basis for further planning.

- Whatever method is chosen, responsibility will need to be assigned for the overall implementation and evaluation of the common assessment agreements/decisions forged at the meetings.

- The LSP or LCPP Committee through the Network is a good vehicle for this follow-up work.

FACILITATION TIPS

Set Clear Goals

- The first meeting is important for setting **group goals** and **terms of reference** that the participants can agree upon and share.

- The facilitator may need to demonstrate the significance of the local common understanding of assessment project within the context of MTCU's overall goals and expectations.

- By helping the group **identify realistic and attainable goals**, the facilitator will be helping to ensure that participants don't stray too far from their original direction.

- Additionally, identifying terms of reference, including **homework expectations, facilitator's roles, communication procedures and working ground rules**, will minimize confusion and assumptions about what is expected.

Identify Areas of Common Interest

- Look for **overall themes and commonalities** upon which participants can build consensus and develop a shared understanding of assessment.

- **Highlight** these areas for participants, and build upon them in future discussions.

- Participants will bring their own training background and experience with them to the meetings. It is sometimes difficult for people to see the overall issues when they are situated in their own perspective. The facilitator needs to **identify areas that require further discussion** and pull these out for the group to examine. This means being able to discern the underlying issue, often quite different than the particular issue being discussed!

Highlight Progress

- It's also the facilitator's job to highlight PROGRESS. Sometimes in the "thick" of discussion, it is difficult for participants to see the progress they have made!

- One useful tip is to recap -- "It seems to me that you all agree that " and then record the agreements on flipchart as a springboard for future work.

- Another useful tip is to summarize at the beginning of each meeting the highlights of the past meeting and the progress made towards the goal of developing a common understanding of assessment.

Don't Confuse Compatibility with "Sameness"

- *The principle behind the common understanding of assessment is that tools and results are compatible.*

- Remember that it is NOT a requirement that participants agree upon everything, nor is agreement necessary to progress to the next step in the process.

- **Be careful not to confuse compatibility with "sameness,"** nor let the process be stalled because all participants don't carry out assessments the same way, or agree upon what a particular piece of student work "means"!

- Consistent and large differences in interpretation or approach may point out an **overall area that needs further work by the group.**

- Small differences are probably inconsequential, and **do not effect** the implementation of common assessment across the Network, or even among key referral partners.

- It's important to be able to discern between the two kinds of differences, and to **acknowledge each agency's autonomy in terms of HOW they carry out assessments**.

Establish Mechanisms for Discussion

- The facilitator should provide participants with at least one mechanism for **identifying differences** in a way that **encourages discussion** but that does not bog down the meetings.

- Setting and adhering to a **time limit** for discussing each agency's assessment tools is a simple and effective way to keep the meetings moving forward.

- Additionally, the facilitator may have to establish a **term of reference (or ground rule)** around "evaluating" other agencies' assessment tools and resources.

- **None of the participants should feel threatened or intimidated during these meetings**, and it will be the facilitator's role to ensure that there is an **open discussion**, but in a **safe environment**.

Encourage Participants to be Prepared

- Work between meetings to ensure that participants have the information they need to fully participate in the next session.

- *This may mean asking participants to do HOMEWORK so that they are ready to share specific information, or able to make decisions for their agency around the table.*

- One tip is to fax, email or call each participant to clarify what will be done at the next meeting, and outline what the participant needs to do to be ready.

- Keep "homework" simple, since participants are busy at their own agencies with their day-to-day work!

- Assigned tasks might simply consist of asking people to bring samples of student work or be ready to make a presentation about their assessment process.

Ensure Each Agency is Represented!

• If the work done around the table is to be truly meaningful and have real impact, then the facilitator must **work to ensure that the composition of the group serves this end**.

• It's important that each **agency is represented at EVERY MEETING**, and in some cases each site, particularly if the sites serve separate communities.

• Let participants know HOW MUCHTHEIR INPUT is required for the success of the project! Ask them to take **responsibility** to ensure that if they can't make a meeting, someone else comes from their agency/site.

• Be ready to identify "gaps" in participation and work to "fill" them. Once underway, the **process itself might point out a need to expand the group to include specific participants!**

Plan Time for "Reporting" and Discussion

• If the participants are working in small groups during the meetings, ensure there is **sufficient time for them to report back** to the plenary group.

• This will allow all participants to feel **connected to the larger project** and will help to ensure that the smaller groups are operating in a complementary fashion.

CHALLENGES EXPERIENCED
Project READ Literacy Network: Model "A"

The Need
for Consistent Participation

- **Participant turnover** was a challenge to the process of developing a common understanding of assessment for the Waterloo-Wellington area .

- The difficulty in maintaining a consistency, however, wasn't an indication that meetings were spread over too long of a time span. Rather, the schedule was well paced, and seemed ideal. Meeting for an afternoon every two or three weeks during the "front-end" of the project kept issues at the forefront so they were still fresh in the minds of participants at the next meeting. Yet, it allowed enough time for a "sober second thought," and for participants to become re-energized.

- The main reason for the lack of consistency was **staff turnover**, so that in some cases, the representatives who had STARTED at the beginning of the process were not working at the agency, or even in the literacy field, by the time it ended. New people came on board, and others left.

Strategies

- As a facilitator, this meant **constantly "recapping" and "clarifying",** as well as ensuring new participants were given the information they needed to join in.

- The situation itself pointed out a difficulty inherent in the TASK of developing a common understanding of assessment cross-agencies. Staff change!

- *Mechanisms, therefore, need to be built into the process to communicate common assessment agreements and decisions throughout the area on an ongoing basis.*

The "Buy-In" Factor

- If the CUA meetings have been viewed as a success by participants, they will have already "bought into" the idea of common assessment. After all, they DEVELOPED the agreements and decisions.

- This same "buy-in" factor will need to be cultivated on a broader basis to include other front-line staff, both new and existing.

- This may mean repeating the same messages over and over again...including the importance of common assessment, as well as HOW agencies have agreed to implement it.

CHALLENGES EXPERIENCED
Simcoe County Literacy Network: Model "B"

Participant Burnout and "Overwork"

- Turnover was NOT a challenge for the Simcoe County Literacy Network participants because the composition of the committee did not change throughout the project. In fact, after the second meeting, **participation was limited** because the participants felt that someone new coming into one of the working groups would slow the process.

- However, the opposite of turnover - **burnout** – was an issue. The short period of time between some of the meetings, the amount of homework expected and the nine-month commitment (February to November) placed a significant amount of stress on some of the participants.

Strategies

- Therefore, it is important that the participants, through the facilitator, **pace the homework**, the **frequency of meetings** and **individual expectations** to **realistically** meet everyone's schedule.

- Additionally, substitutes and back-up resources should be **identified at the first meeting** to help participants ensure their individual workloads are not too onerous.

WHAT WE'D DO DIFFERENTLY
Project READ Literacy Network: Model. "A."

Key Referral Partners

- The CUA process within the Waterloo-Wellington area focused upon **key referral partners**. The series of meetings looked at the relationship of LBS agencies, and how these agencies "fit together" to deliver literacy training in an effective and "holistic" way.

- In order to do this, each agency had to **fully** participate in the discussions and decisions about how assessment would be implemented: first, in their individual communities; second, in their LSP or LCPP area; and third, in the Network area as a whole.

- The process was set up so that participants worked primarily with their immediate **referral partners within their own community grouping**, and then extending the discussion and agreements to include a larger configuration (i.e. LSP providers or Network-wide).

- The idea was to establish a clear and workable understanding of assessment where it counted most - between the **front-line staff who would be encouraging and facilitating the movement of students between their two agencies**. This meant establishing relationships on a **site-to-site** basis.

- To build this kind of relationship, agencies needed to make a commitment to send representatives from **each community** where they offered programming, and ideally, **from each site**.

- WHO and HOW MANY REPS attending the CUA meetings had been left up to each agency, with an understanding that at **least** one person would attend on behalf of the agency per meeting, ideally the same person for consistency.

The "More, " the "Merrier"

- Agencies were **strongly encouraged** to send more representatives, but this was not required.
- **In hindsight, the meetings should have been set up so that agencies sent a representative from each community it served, and ideally, from each site within that community.**
- Broader attendance on a regular basis would have better facilitated **site-to-site** discussions among front-line staff.

WHAT WE'D DO DIFFERENTLY
Simcoe County Literacy Network: Model "B"

Reporting Back

- The CUA model applied in Simcoe County was set up to work with the same 12 people throughout the process. Therefore, the actual working meetings were more restricted than those in Model *"A"*.

- As part of the initial planning process the **project participants indicated that they would report the progress back to their individual agencies and bring forward ideas. questions and concerns**. However, this process was not structured as well as it could have been, and some participants were unsure what to report back to their agencies and what to bring forward to the group.

- To help alleviate this in future projects, asking the questions **"How will this reporting process be conducted?"** and **"What kind of information should I pass back and forth?"** would help the participants and increase the effectiveness of the project.

PARTICIPANT EVALUATION
Project READ Literacy Network: Model *"A"*

Ask for
Participant Feedback

- Participants completed evaluations for the **planning meeting**, and each of the **themes** that were identified as topics for successive meetings.

- The forms asked participants to **reflect on the meeting**, their **understanding and acceptance of the agreements reached**, and to **suggest topics for future meetings**. (To review the evaluation forms, refer to the How-To Guidelines for Model *"A").*

- Overall, participants approved of the facilitation model. **They noted that since they were involved in the planning meeting they had control over the topics for discussion** as well as the timing and frequency of meetings. All participants felt that facilitation during each of the working meetings was positive and supportive.

- Participants found the planning, working and follow up meetings useful. They appreciated the opportunity to learn more about **other LBS agencies** in their communities, **and to meet with other front-line staff** to discuss issues of mutual concern.

- Participants found **sharing assessment processes and tools** helpful when it came to **accepting assessment results** for transitioning learners.

- They also noted that the small group discussions with key referral partners about transition was a valuable opportunity.

Real Proof:
Put the Agreements
into Action!

- All participants accepted the agreements that they had reached during the working meetings. They were also willing to develop and implement plans to follow the agreements in their own programs.

- *Some participants noted. however, the real demonstration of the project's success would be in the number of learners that were actually referred from one LBS agency to another. Would other practitioners actually make the referrals? Would other agencies prefer to hold on to the learners they had'*

- Finally, meeting participants seemed very pleased with a common Training Plan Cover Sheet for use in referring learners from one agency to the other.
- Some participants requested that, as a community, we develop a common Training Plan that would serve the needs of all participating agencies.

NOTE:

The participant evaluation of Model "A" was designed, implemented, and reported by Yvonne Roussy.

PARTICIPANT EVALUATION
Simcoe County Literacy Network: Model "B"

"Highs" and "Lows"

- At the end of each meeting, participants were asked to complete an evaluation form. The form used by the SCLN group asked the participants to specifically report three meeting *highs* and three *lows* instead of having them rank preconceived factors. The facilitator theorized that participants might give a more accurate report if they were able to use their own words to describe the meetings.

- Participants seldom reported three positives and three areas for improvement. Instead, they often focused on just one or two positives or negatives.

- The participants regularly reported that they felt the group was making progress and that the model of small group work was effective and productive.

Importance of the Agenda

- Participants also noted and appreciated when meetings adhered to the agenda. Similarly, when the items on an agenda were not met, they reported that as an area for improvement.

- This suggests that the agenda was an important benchmark for the participants, one which the facilitator should monitor to ensure that the agendas are not too "enthusiastic".

Suggestions for Evaluation

- For the purposes of the pilot, the format of the evaluation forms was kept the same for each meeting. However, in hindsight, a combination of qualitative measures (e.g., Likert or rating scales) and open-ended questions might be more thorough.

- Additionally, a final project evaluation was not administered. Although participants were asked via e-mail to indicate what they felt were the successes and the challenges and to offer recommendations for improvement, fewer than half responded.

- Therefore, a more formalized evaluation form administered during the last meeting or via email immediately upon completion would help the project leaders meet their accountability and evaluation requirements.

PRLN: Facilitation Model "A"
How-to guidelines for Developing
a Common Understanding Assessment

CONTENTS

The Planning Meeting

AT THE START

- Each agency offering LBS training throughout Waterloo Region and Wellington County was invited to participate in the process of developing a common understanding of assessment by sending a representative to a **planning meeting**.

- The invitation was extended through the LCPP **Committee**, the advisory group for the project. Members were asked to **identify a staff member** at their agencies who had experience in delivering LBS training, and would be able to contribute to defining the project and the direction it should take.

- The LCPP Committee decided that the project would involve **front-line staff** rather than managers – those people at their agencies who were directly involved with students and assessment and had firsthand experience to offer. All participants in the planning meetings and the follow-up "working" meetings were front-line staff. These included **assessors, instructors, coordinators, and intake personnel**.

- Some agencies sent representatives to the planning meeting by community and site: others sent one representative. The only **requirement** was that each agency, through its LCPP Committee member ensure that at least one person attended to represent it.

FOCUS

- What does "developing a common understanding of assessment" MEAN to our area?
- Designing plans for future meetings

DESIRED OUTCOMES

- Participants discuss their ideas about what developing a common understanding of assessment means, and how it might be accomplished.

- Participants highlight those areas which are most important to them, and that they want to pursue at future meetings.

- Participants plan the "logistics" of future meetings where, how often, when, who, and what.

- Participants give direction to the facilitator about HOW to organize the project and outcomes.

- Participants "buy into" the project by agreeing to be active participants.

Agenda
The Planning Meeting

OVERVIEW

- Introductions
- About the project
- Springboard for Discussion: About Common Assessment
- Today's agenda
- Today's outcomes

DEVELOPING A COMMON UNDERSTANDING OF ASSESSMENT

- What does it MEAN?
- Is it achievable?
- Priorities and themes - HOW do we do it?
- Scheduling details for future meetings

WHERE DO WE GO FROM HERE?

- Getting ready:
  - What should participants do to prepare?
  - What should facilitators do to prepare?

Springboard for Discussion About Common Assessment

- By end of year *(2000/2001),* agencies identify a common assessment process by which they understand and accept assessment results of key referral partners.

- By end of year *(2001/2002),* agencies understand and accept the assessment results of their literacy services planning partners.

- Agencies begin to include a broader range of stakeholders in the understanding of assessment results.

Source: MTCU , Directive 2: *Developing Common Assessment,* 1999

- The implementation of common assessment will allow learners to move from one agency to another without re-assessments. This movement will be possible because assessment tools will have been cross-referenced to the common language of learning outcomes and to the five LBS levels.

- Common assessment refers to the use of compatible assessment tools and approaches across the field, not to the development of a single instrument. Common assessment is built upon a common language of progress: the LBS learning outcomes.

- The LBS outcomes language is used in the learner's training plan to describe the results of learner assessment. This feature will help to ensure that when learners move to other programs, they will not need to be re-assessed despite difference in programming and assessment tools the agencies might use.

Source: MTCU , Directive 2: *Developing Common Assessment,* 1999

What the participants Said:
Highlights of the Planning Meeting

- Interests of the students must be kept to the FOREFRONT throughout Common Understanding of Assessment (CUA) meetings; need to make "system" easier for the students, more relevant; maintain student's strengths in order to ensure goals are achieved and progress continued.

- Initial, ongoing and exit assessments should be examined as part of the CUA process; one agency's exit assessment must mesh or dovetail with another agency's intake or initial assessment.

- An important focus is the Training Plan; participants need to share agencies' Training Plans and discuss what information they should contain; should develop methods of documentation; i.e., providing information in a precise, easy to- read way that clearly communicates to the "next-step" agency the student's goals and progress made toward them.

- CUA meetings should address Training Pathways; how agencies work together to fulfill parts of the Training Plans; reach clear agreements about how students might be sent to other agencies to deliver specific learning and then return to original agency for remainder of training; role of each agency.

- Participants need an understanding of each agency's assessment tools and methods before they can talk about how systems work together and assessments mesh, and can agree to ACCEPT each other's results.

- Participants should clarify how clients/students are "coming to their door"; examine referral process. For example, must the initial assessment process be repeated in full for every student? Assessment results and processes should be compared so that agencies can reach agreement about what to assess and when. Participants should explore what must be included in a Training Plan, and/or what agreements need to be in place, so that key referral partners build upon assessments done by the referring agency, instead of starting "from scratch". The CUA process needs to examine the referral package; what is sent with student upon exit to communicate assessment results, progress, and goals?

- Self-management and self-direction skills must be considered. What skills do students need to help them make a successful transition from one agency to another? How can agencies facilitate or support the student in developing these skills?

- Agencies need to compare what they mean when they talk about specific learning outcomes, particularly at those LBS levels where students tend to move from one agency to another. Rather than trying to explore and agree upon the broad spectrum of LBS levels and domains, the meetings should focus upon developing an understanding of the LBS entry levels required by key referral partners.

- Effort should be directed at developing an understanding of assessment where agencies "link"; that is, entry levels and what they mean in terms of learning outcomes / assessment. CUA meetings need to focus upon those levels / learning outcomes that impact upon exit from one Agency and entry into another - rather than try to focus on EVERYTHING!

- "Myths" need to be dispelled, so that each participant, and ultimately his or her agency, has a clear understanding of the training delivered and programs offered by other LBS agencies in the community. Participants need to understand how each agency serves students, and how one agency might meet the "next-step" requirements of another agency's exiting students. The CUA process should explore not only where transitions NOW take place, but where they might or should be taking take place; potential referral scenarios.

- Meetings should be organized around "themes" or topic areas that help participants explore how agencies fit together in terms of assessment/ referral PROCESS; an overview examination of the system as a whole, or at least, among key referral partners. This method is recommended over focusing each meeting on a specific domain, learning outcome, or LBS level.

- Meeting themes might include: Training Plans; the low level student; assessment processes and tools; training delivered by each agency; key referral partners & linkages; interpretation/ assessment of LBS levels; examining assessment results - how do agencies communicate, use, and build upon assessment results for students in "transition" between agencies?

- Agencies will send a minimum of one representative to each meeting, and ideally, one participant for each site and/or program. More participants are welcome to attend meetings if the agency would like to send them! However, participants must be involved in a front-line capacity at the agency and have a practical, working knowledge of learning outcomes (i.e., instructor, coordinator, assessor, intake personnel).

Working Out Scheduling Details
Sample Worksheet

POSSIBILITIES	AGREED
When to meet? - best day of the week? - morning, afternoon, or all day? - time?	❒ _____ ❒ _____ ❒ _____
How often? - Approximate number of meetings	❒ _____
Dates?	**Working' meeting dates:** 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____
Who should attend? - Min. one rep. per agency each meeting? - Min. one rep. from each site? - Same person/people each time? - As many front-line staff as can come? - Assessors? coordinators? Instructors? - Approx. number of people?	❒ _____ ❒ _____ ❒ _____
Where to hold meetings? - Joint meetings (both LCPPs?) - Same location each time? - Different locations? - Suggestions? Volunteer hosts?	**Locations per meetings:** **1.** _____ **2.** _____ **3.** _____ **4.** _____ **5.** _____ **6.** _____

What Happened Next
Future Plans

- The highlights of the planning meeting - the results of the discussions among agency representatives -- became the basis for facilitating the common understanding of assessment process, particularly the decision to focus upon "overall systems" – how agencies and their assessments fit together or link.

- Future meetings looked at how assessment results would be communicated to key referral partners so that tools and processes were not only COMPATIBLE among agencies, but results actually USED to support a student's progress towards his or her goal and to build future learning.

- The remainder of the CUA process consisted of six workings meetings of three hours each. Sixteen front-line staff attended the first five meetings. Thirty participants attended the sixth meeting.

- The working meetings each covered a specific theme drawn from the highlights of the planning meeting. Wherever possible, participants formalized the results of the meetings into agreements to record and structure their work.

- The following pages OUTLINE in a "how-to," meeting by- meeting fashion the process by which participants developed a common understanding of assessment and reached agreements to keep their shared understanding alive across the Network area.

Theme: Key Referral Partners

FOCUS

- Identifying key referral partners
- Overview of each agency's programming

DESIRED OUTCOMES

- Participants identify their agency's key LBS referral partner(s)
- Participants identify an LBS agency from which they'd like to increase referrals
- Participants gain a general understanding or overview of the LBS programs offered by their key referral partner(s)

Getting Ready

PARTICIPANT HOMEWORK

- Come to the meeting ready to share information with the group about the LBS programming your agency offers.

- You might also want to prepare by checking your referral statistics (if available) to help you identify your key referral partners.

Agenda:
Theme: Key Referral Partners

REVIEW

- Highlights from past meeting
- Today's agenda
- Today's outcomes

IDENTIFYING KEY REFERRAL PARTNERS

- Exercise 1 (present partners)
- Exercise 2 (potential partners)
- Exercise 3 (optional -- non-LBS partners)

PROGRAM INFORMATION

- Exercise 4 (sharing info about programs)

WHERE DO WE GO FROM HERE?

- Next meeting: date, place, time
- Topic: Meeting theme
- Getting ready:
  - What should participants do to prepare?
  - What should the facilitators do to prepare?
- Evaluation

Exercise 1
Identifying Key Referral Partners

- Work in a small group with other participants from your agency.
- Identify your LBS key referral partner(s): the LBS agency and site to which you most often refer students, and the site from which you receive the most student referrals.

- If your agency has multiple sites where LBS programming is offered, identify a key referral partner for each of the sites.

WE MOST OFTEN REFER STUDENTS TO:

LBS Agency _____

Site _____

WE MOST OFTEN RECEIVE STUDENTS FROM:

LBS Agency _____

Site _____

Exercise 2
Identifying Key Referral Partners

- Discuss and identify:

  Is there an LBS agency/site that **should be** a key referral partner but isn't right now and where you'd like to **increase** referrals to/from?

- Why do you think this agency should be a key referral partner?

WE'D LIKE THE FOLLOWING AGENCY/SITE TO BE A KEY REFERRAL PARTNER:

LBS Agency _____

Site _____

HERE'S WHY:

_____

_____

Exercise 2
Identifying Key Referral Partners

OPTIONAL

- Discuss and identify:
  What agency / organization is your non-LBS key referral partner?

- Is there a non-LBS agency that should be a key referral partner but isn't right now and like to increase referrals to/from? Why?

OUR KEY NON-LBS KEY REFERRAL PARTNER IS:

Name _____

WE'D LIKE THE FOLLOWING NON-LBS AGENCY TO BE A KEY REFERRALPARTNER IN THE FUTURE:

Name _____

HERE'S WHY:

_____

_____

Facilitation notes
Exercises 1, 2, and 3

- Divide into small groups or pairs comprised of participants who work at the same agency.

- Agencies will probably want to identify more than one key LBS referral partner - that's okay.

- Once participants have had a chance to discuss and answer the exercise questions, bring all participants back together into a large group.

- Have agencies report to the group. Make a Master List of key referral partners and potential partners according to agency / site.

- Ensure that each agency / site identifies at least one key referral agency, as well as an agency where they'd LIKE to increase referrals.

- **OPTIONAL** - you may wish to have agencies report about their non-LBS referral partners, present and potential. It is useful information for future planning, and identifies common interests and student clientele bases.

Exercise 4
Program Information

FIRST ...

- Meet with those participant(s) representing your key referral partner. If you don't already know each other, introduce yourselves.

- Share general information about your agency and programs.

- Be sure you have a clear understanding of the programming that the other agency offers, and ensure the agency understands your programming. Ask those questions you always wanted to have answered!

THEN...

- Meet with the representative from the LBS agency you identified with which you'd like to increase referrals.

- Share general information about your agency and programs.

- Talk about why you think your agencies would make good key referral partners. For example, do you have a similar client base? Are your agencies close in proximity? Do many of your students need to attend that agency as the next step in order to reach long term goals?

Facilitation notes
Exercise 4

- Depending upon the group, you might present this activity as a coffee break mingling session (where people chat with one key referral partner, and then after a few minutes, chat with another one) or as a more formal activity.

- Each participant should share information with a minimum of two other people during this exercise: one key referral partner, and one potential key referral partner.

- Bring back to large group. Did you learn something new about another agency? Something you didn't know before?

FOLLOW-UP & WRAP-UP

- You may wish to have each agency present a brief overview to the large group about its agency's programming and sites/locations. Encourage questions and requests for clarification.

- DON'T *MOVE* ONTO THE NEXT THEME until participants have the **base knowledge** they need about each other's programs to be able to reach useful agreements about common understanding of assessment.

- Relate how a basic knowledge of your key referral partners' programs is important to developing a common understanding of assessment.

Post Meeting

FACILITATOR'S THOUGHTS (in hindsight)

- Participants needed to have a basic understanding of each other's programming and agencies as a foundation upon which to build future agreements.

- It was important to set aside time at the beginning of the process to establish a baseline starting point. Without a common(and accurate) understanding of each other's programming, members are unable to analyze HOW their assessments results, processes and approaches, can mesh or link.

- Change over in agency staff, in particular, meant that people came to the meeting with different levels of experience and knowledge. Some did not know basic facts about other LBS agencies in their area. They lacked an accurate picture of WHA T programs were offered, HOW agencies delivered services, and WHO could access them.

- The more "front-line" the participant, the "less" knowledge he or she seemed to have about other programs. Yet, the involvement of "front-line" practitioners, particularly those working directly with students in a classroom or as an assessor, is vital to putting the agreements into practice.

- Some experienced participants felt frustrated that they had to repeat basic information about their programs. Their frustration didn't lie with the CUA process, but with misconceptions about their programs that existed around the meeting table.

- Developing trust is an important part of the CUA process - participants needed to know they could ask basic questions without feeling embarrassed by their lack of knowledge. They also needed to be encouraged to ask questions and voice concerns at the meeting, rather than away from it.

- In several instances, LBS agencies reported that they received many more referrals from non-LBS agencies than LBS agencies.

- Establishing key referral partners (and potential partners) provided a good way to ensure exercises had practical meaning to the group members, rather than being simply theoretical. Participants could see HOW developing a common understanding of assessment had useful implications to their programs.

- It facilitated the process to have participants be as specific as possible when identifying key referral partners. For example, an agency may have several sites and locations spread across a wide geographical area, particularly if it serves more than one community. Identifying key referral partners by sites and locations, not simply by agency, and then having participants work in corresponding groups, ensured agreements and discussions occurred at a "grass root" level. This is important so that agreements, once made, are implemented on a front-line basis.

- The key referral exercises also helped to identify participants that NEED to be at the table for future meeting and weren't present at this meeting!

Sample Participant Evaluation

1. Overall, how useful was today's meeting?

Very Useful	Somewhat Useful	Not Useful	Useful

2. Do you feel that you have identified your key referral partner(s) at this point?

YES NO

3. Do you feel that you have had an adequate opportunity to communicate information about your agency's programs?

YES NO

4. What feature/activity of today's meeting has been most helpful to you?

5. Are there any other tasks/activities that you think would improve your understanding of other agencies' programs and help you identify your key referral partners?

Theme: Assessment

FOCUS

- Overview of how each agency conducts assessment
- Process, tools, student samples
- General agreements about assessment

DESIRED OUTCOMES

- Participants gain a general understanding or overview of how their key referral partner(s) assess students - process, tools, samples

- Participants reach agreement with other LBS agencies (particularly key referral partners) about aspects of each other's assessments that they can accept

Getting Ready

PARTICIPANT HOMEWORK

- Come to the meeting prepared to tell the group about how you carry out assessments at your agency.
- Bring samples of tools and forms you use for initial, ongoing, and exit assessments to show the group.
- Bring a few samples of student assessments to share.
- Remember to remove the student's name and other identifying information.

Agenda
Theme: Assessment

REVIEW

- Highlights from past meeting
- Today's agenda
- Today's outcomes

ASSESSMENT AT OUR AGENCIES

- Exercise 1 (questions to ask each other)
- Exercise 2 (sharing assessment approaches and processes)

REACHING AGREEMENT

- Exercise 3 (identifying similarities and differences)
- Exercise 4 (initial assessment)
- Exercise 5 (students in transition)

WHERE DO WE GO FROM HERE?

- Next meeting: date, place, time
- Topic: Meeting theme
- Getting ready:
  - What should participants do to prepare?
  - What should the facilitators do to prepare?
- Evaluation

Exercise 1
Assessment At Our Agencies

- Find a partner.
- Choose someone from an agency other than your own.
- Brainstorm together a list of general questions you would like to have answered by participants when they share information about how they do assessments at their agency.
- Jot them down below.

OUR QUESTIONS:

_____

_____

_____

_____

_____

Facilitation Notes
Exercise 1

- Have participants work in pairs. Organize activity so partners are not from the same agency.

- After pairs have completed the exercise, bring large group together again.

- Create Master List.

- Keep questions general (rather than specifically aimed at a particular agency).

- Use as a checklist and guide for presentations/ discussion during remainder of meeting.

- Point out WHY this activity is important. It ensures participants get the information THEY need in order to develop a common understanding of assessment around the "table." For example, what do you need to know about HOW your key referral partners carry out assessment in order to be able to accept their assessment results?

- As an alternative (depending upon time), you may simply set up the activity as a large group brainstorming session, rather than working in pairs.

Exercise 1
Assessment At Our Agencies

- In small groups, share information about HOW you do assessments. Include a general overview, then the examples/samples you brought.
- Use the Master List from Exercise 1 to help guide the conversation.
- Feel free to ask each other questions!
- Be sure to request clarification if there is something you don't understand about HOW another agency carries out assessments.

Facilitation Notes
Exercise 2

- Divide participants into small groups according to key referral partners. Are there natural groups that flow from previous exercises?

- One way to organize groups is according to community (and indeed, that might be the natural grouping that occurs from exercises to identify key referral partners). For example, agencies that serve the same town or neighbourhood may work together.

- Another approach is to organize groups so that each sector is represented: 1-1, school board, colleges. This encourages a sharing of different approaches to assessment across sectors.

- Emphasize that the purpose of the exercise is to share information and gain an overview understanding of each other's assessment process - not to "judge" another agency's process or results.

- Note that there will be an opportunity at other meetings to look at assessment results in more depth.

- Encourage groups to touch upon the three aspects of assessment: initial, ongoing and exit.

- Refer to the Master List created in Exercise 1 as a discussion guide. Ensure the questions are answered!

Exercise 3
Reaching Agreement

FIRST ...

- Compare the approaches to assessment among agencies in your small group (key referral partners).
- Use flip chart paper to record key points. What similarities did you find? What differences?

THEN...

- Make a presentation to the large group. Summarize the similarities and differences in assessment processes and approaches.

Similarities	Differences

Facilitation notes
Exercise 3

- Work in the same small groups as for Exercise 2 for the first part of the activity.

- Based on the information they've learned about key referral partners during Exercise 2, have small groups compare their assessment processes and approaches, and "flip chart" the results.

- Point out that participants will use the discussion of similarities and differences in order to find common ground towards developing an understanding and acceptance of each other's assessments.

- Next, have each small group make a presentation to the larger group about similarities and differences in their assessment processes and approaches. Post the flip chart lists created by each small group.

- Give the larger group plenty of opportunity to ask questions of agency representatives about their assessment processes.

- By the end of the presentations, participants should have sufficient general knowledge about how other agencies carry out assessments (particularly their key referral partners) that they can proceed towards GENERAL agreements (see Exercise 4).

- If participants do not feel they are ready to proceed, find out what information is required and how it can be provided.

Exercise 4
Reaching Agreement

FIRST ...

- Focus on initial assessment. Think about the agency presentations you have just heard. Review the flip chart lists of similarities and differences.

- What are the elements that are (in most part) common to all of the initial assessments?

- For example, has each agency said that it identifies short-term and long-term goals with the student?

OUR INITIAL ASSESSMENTS INCLUDE THESE ELEMENTS IN COMMON:

_____

_____

_____

_____

_____

_____

Exercise 4
Reaching Agreement

THEN ...

- Examine the list of common elements. Is the list complete? Are there elements that you think SHOULD be part of every initial assessment process, regardless of LBS agency, and that do not appear on the list? Discuss!

- Work to develop a common understanding among your key referral partners (and if possible, the larger group, community, or Network as a whole) of what constitutes initial assessment. Add agreed-upon elements to the list.

- Then work towards reaching agreement that each agency will provide these elements as part of the initial assessment process.

- For example, "A referral or placement assessment will be part of the initial assessment process for every student entering our agencies. Each agency will provide this service. We all agree that training options are discussed with the student and he/she will be referred to the most appropriate agency."

ADDITIONS TO OUR "INITIAL ASSESSMENT" LIST:

_____

_____

_____

_____

_____

_____

Facilitation notes
Exercise 4

- Set up the first part of the exercise as a large group activity.

- Help the group see HOW their assessment processes and approaches are similar. Speak in GENERAL terms. For example: "We may carry out the referral! placement assessment in different ways, but we all carry it out. "

- Focusing on initial assessment makes the task easier, since it narrows the discussion. However, participants will soon discover that they really can't talk about one aspect of assessment in isolation, since each aspect or type of assessment impacts on the other. Be ready to recognize overlap and draw attention to links!

- You might continue the rest of the exercise as a large group activity, or have participants return to their small groups of key referral partners. Which is best will be decided by the needs of the group as a whole, the size, and how well participants are making decisions together.

- Wherever possible, try to "broker" agreement among the larger group -- across an entire community, Network, or LSP area. However, continue to focus on key referral partners, since this is where the agreements need to be implemented at a grass root level.

Exercise 5
Reaching Agreement

FIRST ...

- Let's say your agency receives a student that has been referred from a key referral partner.

- Having listened to the presentations, and examining the list of common elements, are there parts of the referring agency's assessment that you can agree to accept "as is" without re-assessing?

- For example, "I can see you put a lot of effort into helping the student identify a long-term goal. I can accept your goal statements - there's no need to reassess for goals when the student enters my program."

- Work to develop agreement among your key referral partners (and if possible, the larger group, community or Network), about what parts of the other agency's assessment that you can accept without re-assessing when a student is referred.

WE AGREE TO ACCEPT:

_____

_____

_____

Exercise 5
Reaching Agreement

THEN ...

- Discuss how agreements will affect your agency PRACTICALLY. For example, how will the initial assessment or intake process be different for a "new" student who has never participated in LBS training before, and a student who HAS participated and is moving between your LBS agencies to continue training?

Assessment & Intake Process

NEW or PROSPECTIVE STUDENT	STUDENT IN TRANSITION

Exercise 5
Reaching Agreement

NEXT ...

- Think about LBS levels and Learning Outcomes.

- IN GENERAL, can key referral partners agree to use the exit results from a referring agency rather than reassessing literacy skill?

- For example, "If your agency assesses the exiting student to be working at a specific LBS level and Learning Outcome, we'll accept and build upon that assessment ...."

- Can the agreement be extended to include the larger group, community or Network? What information do you still need before you can reach this agreement. How will you get this information?

FURTHER INFORMATION REQUIRED:

_____

_____

_____

Exercise 5
Reaching Agreement

FINALLY ...

- There are probably special situations that you have talked about in your discussions where applying an agreement would be difficult.

- Acknowledge them! For example, "If the student has taken a long time off before resuming literacy training, then we may need to re-do the initial assessment process (or parts of it) when he/she enters our agency."

- Try to word your agreements in such a way that they are flexible! Agreements should FACILITATE student participation in literacy training and learning.

SPECIAL SITUATIONS or CONDITIONS:

_____

_____

_____

Facilitation Notes
Exercise 5

- Throughout the process, keep a list of the areas where participants cannot yet agree or reach a consensus. Identify what information the group still needs, and design future activities / discussions that will help participants gain the required information in order to reach agreement.

- Depending upon the participants, you may wish to set up portions of the exercise as small group work with key referral partners, particularly when discussing issues of referral and how assessments will mesh in a practical way. However, it is always helpful to bring the discussion back to the larger group to develop agreements that can be applied across the Network / LSP area.

- As facilitator, listen carefully and draw attention to potential areas where agreements might be reached. Sometimes, when immersed in the discussion or the perspective of "my agency does it this way," participants cannot see the "forest for the trees!" That's the facilitator's job!

- Conditions will arise where a particular agreement does not fit. You may wish to keep a "parking lot" flip chart list of such situations, and then refer to them during the last part of the exercise. Try not to let specific situations become roadblocks -- keep agreements flexible and general. Acknowledge that agreements are not "carved in stone", nor are they meant to be viewed in that way. There will always be exceptions.

Post Meeting

FACILITATOR'S THOUGHTS (in hindsight)

- Sharing assessment information in a "Show 'n Tell" presentation by each agency was extremely useful. Its primary outcome was to draw attention to common ground among agencies in terms of process and tools, and to develop a trust among participants that their key referral partners methods were sound.

- This "Show 'n Tell" approach was time-consuming; however, the exercise was imperative to the next step. Agencies were able to reach agreements much more quickly than anticipated after they had an understanding (in a broad sense) of how others implemented assessment. In many cases, agencies realized they used almost identical processes and methods, and therefore, could easily agree to accepting assessment results from each other and building upon them (rather than reassessing).

- In cases where agencies employed very different methods, others could see the results were sound, and could therefore accept them or work towards that end. The task of developing a common understanding of assessment became less onerous.

- Cross-sector awareness and acceptance of assessment methods were important for reaching future agreements. For example, a 1-1 agency's presentation demonstrated that its staff did a thorough and astute job of assessing students. The presentation put to rest distrust/lack of confidence in the 1-1 methods and results that had been voiced by some participants from other sectors. Professionalism . cross-sector and cross-agency was recognized.

- Surprising to the facilitator, participants easily made the "jump" to accepting assessment results in terms of literacy skill, and expressing these results in Learning Outcomes language. Key referral partners could see that there were reliable methods behind each other's assessments. The task of "hashing out" what each agency meant in specific terms when it talked about a Learning Outcome, level and success marker, and reaching agreement about it became less important. Instead, it became more pressing to reach agreement upon what assessment information participants would commonly agree to collect, how agencies would use each other's results, and how assessments would mesh and be communicated to each other.

- By developing this consistency among key referral partners, and then the greater community, Network or LSP area, participants found that they could better trust the content and quality of each other's assessments. The method of finding consistency was making common agreements.

- It was important to emphasize that discussions and agreements were general in nature, rather than specific. (There would be opportunity at other sessions to look at student samples of assessment in detail). It was easier to reach agreements once it was understood that flexibility was built into the process, and that there would always be exceptions or special conditions. Agreements were not meant to stifle, but facilitate. They did not take away an agency's ability to implement their literacy program in the way they saw best, nor did it mean agencies HAD to do things in the same way.

- Special conditions were acknowledged and built into the agreements. For example, an agency would, in general, agree not to repeat goal-setting with a student who had been referred to them, but accept and build upon the work that had been done at the previous agency. However, an adult may have changed his/her long-term goal in the meantime, in which case, the receiving agency would need to do goal-setting at intake.

- Participants spoke mainly about their initial assessment process during presentations and afterwards. Several agencies hadn't worked out ongoing and exit assessment to the same degree, so weren't as comfortable discussing them. Focusing upon initial assessment offered a way to "start" the discussion, and then naturally move into other areas (since so much of the assessment process is interconnected).

- Sometimes the exercises pointed out shortcomings or differences in quality of assessment. This information was useful to the facilitator and earmarked for further discussion or exploration. Coming to overall general agreements helped "level out" inconsistency without "pointing fingers." For example, by agreeing upon a list of elements that would be part of the initial assessment process at each agency, it ensured a consistent quality across the Network areas.

- The exercises also pointed out different methods of operation at agencies that led to challenges in implementing aspects of the agreements. At some agencies, for example, the intake process was not carried out by LBS staff, and therefore, the referral or placement assessment did not happen (or not to the degree that is should). It was unlikely that students would be channeled to another LBS agency at intake, even if that other agency better met their needs. By "pulling out" and emphasizing the referral or placement assessment as an important element ALL agencies needed to fulfill, then its importance was highlighted and the responsibility each agency had to ensure that it happened. The mechanics of HOW was up to the individual agency. That it DID happen became the shared concern of the larger group.

- Finally, starting the process of reaching agreements in small groups of key referral partners or geographical area/community, and then building towards agreement within the larger group or Network/LSP area, worked well. Often, the agreements/discussions of each small group mirrored the agreements/discussions of other small groups, and it made sense to pool or combine the insights and reach agreement (wherever possible) among all participants.

Sample Participant Evaluation

1. Overall, how useful was today's meeting?

Very Useful	Somewhat Useful	Not Useful	Useful

2. Do you feel that you understand your key referral partners' assessment process/instrument better after today's meeting?

YES NO

3. Have you and your key referral partners reached an agreement about what pieces of the assessment will be done by a referring agency for transitioning learners?

YES NO

4. Are there any other tasks/activities that you think would help to give you a better understanding of how other agencies do assessments or evaluate assessment results?

5. Now that we have shared our assessment tools and processes I feel confident that we can reach a common understanding and acceptance of assessment results.

- ❒ I strongly agree with this statement
- ❒ I agree with statement
- ❒ I disagree with this statement
- ❒ I strongly disagree with this statement

Theme: Training Plans

FOCUS

- Overview of each agency's Training Plans
- Samples of Training Plans
- General agreements about Training Plans

DESIRED OUTCOMES

- Participants gain an understanding of the Training Plans used by other LBS agencies.

- Participants identify what their agency needs to see on the Training Plan of a student who is entering their program.

- Participants reach agreement about what Training Plans will contain for a student in transition to a key referral partner.

- Participants reach agreement about what information needs to be communicated through a Training Plan, and how this will be done for the Network ILSP area as a whole.

Getting Ready

PARTICIPANT HOMEWORK

- Come to the meeting prepared to tell the group about your agency's Training Plans.
- Bring samples of blank forms you use, as well as samples of Training Plans you have created with students.
- Remember to remove the student's name and other identifying information.

Agenda
Theme: Training Plans

REVIEW

- Highlights from past meeting
- Today's agenda
- Today's outcomes

TRAINING PLANS AT OUR AGENCIES

- Exercise 1 (questions to ask each other
- Exercise 2 (agency presentations)

REACHING AGREEMENT

- Exercise 3 (what's each agency requires on a Training Planfor a student in transition)
- Exercise 4 (strategies cross-Network)

WHERE DO WE GO FROM HERE?

- Next meeting: date, place, time
- Topic: Meeting theme
- Getting ready:
  - What should participants do to prepare?
  - What should the facilitators do to prepare?
- Evaluation

Exercise 1
Training Plans at Our Agencies

- Think about Training Plans.
- Brainstorm a list of questions you'd like to have answered by participants when they share information about their agency's Training Plans.

Our Questions

_____

_____

_____

_____

_____

_____

Facilitation notes
Exercise 1

- Set up as a large group activity.
- Create a Master List of GENERAL questions the group wants answered by speakers when they make their presentations about the Training Plans they use at their agency.
- Follow-up the activity with presentations by agency representatives.

Exercise 2
Training Plans at Our Agency

- Make a presentation to the group on behalf of your agency telling us about your Training Plans.
- Show us samples.
- Be sure to include the answers to the questions from the list we've brainstormed together.

Facilitation notes
Exercise 2

- If numbers allow, continue as a large group activity.
- A general understanding of Training Plans used by all agencies will later facilitate participants reaching agreements about what common information should be included on Training Plans Network-wide, and/or among LSP partners as a whole.
- Keep the presentations short - focus on an overview look at Training Plans used by each agency.
- Use the Master List as a guide during presentations. Have the speakers answered the questions? Is there more information or clarification the group needs?

Exercise 3
Reaching Agreements

- Work in small groups with your key referral partner(s). Discuss what each agency needs/wants to see on a Training Plan of a student referred to it.

- Focus on the Training Plan as a tool to communicate the information you will need to implement the agreements previously made.

- For example, if you have agreed not to repeat the initial assessment for a referred student, but build upon assessment information from the previous agency, what will you need to know in order to do this? In what detail?

- Come to an agreement about what information you WILL provide on the Training Plan of a student in transition among your agencies.

As key referral partners, we agree to provide the following information on our Training Plans:

_____

_____

_____

_____

_____

Facilitation Notes
Exercise 3

- Set up as a small group activity among key referral partner(s).

- Have participants discuss what info they NEED to know to help a student make a smooth transition to the new agency and what info they WILL provide to the new agency when they refer a student.

- You may wish first to review agreements made at the previous meeting(s) concerning assessment. How might the Training Plan be used as the tool to communicate the information required to put these agreements into effect?

- Think in practical terms. What will the instructor / practitioner need to know at the new agency in order to help the student continue towards his / her individual goal? How will he / she get this information?

Exercise 4
Reaching Agreement

- Be ready to present to the larger group the Training Plan agreements that you made with your key referral partners.

- Compare the information you and your key referral partners decided to provide to each other with the agreements made in the other small groups. Are there similarities? Have other groups come up with ideas that you would now like to incorporate?

- Work towards reaching a common or shared agreement among all participants. Can you come to an agreement about how you will use Training Plans among all LSP partners or Network-wide?

- Are there other strategies that you can commonly implement to communicate assessment information?

As LSP-partners (or Network-wide), we agree:

_____

_____

_____

_____

_____

Facilitation notes
Exercise 4

- Set up as a large group activity.
- One approach is to have a small group of key referral partners make a presentation about what they decided would be part of their Training Plans.
- Make a list of the key points.
- Ask the rest of the group to comment with the goal of creating a common list that they might all accept. Have they included the same information? Different information? Would they like to add something? Delete something?
- Emphasize communication, that is, how assessment results/info can be communicated among agencies to best facilitate the student's learning.
- Listen for, and draw the group's attention to, other strategies that come up during discussions that might complement or accompany the Training Plans and further clarify or communicate assessment information / results. Work to incorporate these strategies into agreements, too, as participants find useful and appropriate.

Post Meeting

FACILITATOR'S THOUGHTS (in hindsight)

- It helped the process immensely to focus upon the use or purpose of the Training Plan as a communication tool. HOW would participants ensure that they had the information required to fulfill the agreements they had made concerning assessment? An agency could not "build upon" assessment results and learning done at the previous agency if it did not know what was, indeed, done – the Training Plan became one of the main tools to facilitate this exchange of information. It presented a concrete strategy for how agencies would link their assessments.

- This led to discussions of what NEEDED to be included on the Training Plan or accompanying it. Deciding upon these areas or elements was another aspect of developing a common understanding of assessment Network-wide.

- Training Plans "looked" quite different cross-sector. The group did not focus upon the format of individual Training Plans, nor feel the immediate need to develop a common Training Plan that would be used by each agency. More important was that the Training Plans provided the information that the "next" agency required, and in a way that it could understand. As with other agreements, autonomy for HOW it might be accomplished, and WHO within an agency would accomplish it, was the responsibility of the individual agency.

- The group, however, did decide to develop a common Exit/Referral Cover Sheet to accompany the Training Plans. The purpose of the cover sheet was to communicate key information in a quick, consistent, and thorough way. This need grew from the discussions around HOW to use the Training Plan to communicate assessment information from agency to agency so not to RE-DO what had already been done in the past. The student would not undergo another series of assessments, nor be asked to remake decisions he / she had already made concerning learning.

- Participants identified the content of the cover sheet, and the tool was further developed as part of the project. Its use Network-wide became a common assessment agreement, and participants set collection and tracking of the cover sheet by each agency as a related performance indicator.

- The group also agreed to forward the exit demonstration - either the actual student demo or its description (depending upon practicality) to the next agency along with selected samples of student work.

- As well, each agency agreed to help the student develop a learning portfolio that would demonstrate / communicate current skill level in a practical way. The student would be asked to take the learning portfolio with him/her upon exit to the "next-step" LBS agency, and the "next-step" agency would ask to see it.

- Highlighting and reviewing key points and agreements from the previous meeting at the start of the next meeting was extremely important for building upon past work. It not only gave participants a starting point for new work, but also a sense of accomplishment. In the "thick" of the discussion, it is sometimes difficult to see progress or to separate what might be useful from what is not. Agreements were often made or reiterated at the beginning of the NEXT meeting after reviewing the highlights.

Sample Participant Evaluation

1. Overall, how useful was today's meeting?

Very Useful	Somewhat Useful	Not Useful	Useful

2. Do you feel that you have reached an agreement about what information is required on a Training Plan when a learner is referred to a program?

YES NO

3. What feature/activity of today's meeting has been most helpful to you?

4. Are there any other tasks/activities that you think would improve your understanding of other agencies' Training Plans?

5. Do you feel that developing a common regional/county/network Training Plan for transitioning learners is a worthwhile goal for this project? Why or why not?

6. After today's meeting, I feel confident that I can understand and accept a Training Plan from another agency.

- ☐ I strongly agree with this statement
- ☐ I agree with statement
- ☐ I disagree with this statement
- ☐ I strongly disagree with this statement

Theme: Identifying Transition Skills

FOCUS

- Overview of each agency's entry requirements
- Identifying related skills (both required and desired)

DESIRED OUTCOMES

- Participants have an understanding of the entry REQUIREMENTS that a student in transition to a key referral partner should possess.

- Participants have an understanding of the DESIRED or HELPFUL skills that students in transition to a key referral partner MIGHT possess.

- Participants reach agreement with their key referral partner(s) about skills that they will assess and work to help students learn to facilitate an adult's smooth transition.

- Participants have identified the LBS levels where they "link" (student entry/exit) with key referral partners.

Getting Ready

PARTICIPANT HOMEWORK

- Come to the meeting prepared to tell the group about entry requirements and expectations / suggestions for a learner coming into your agency.

- Be ready, as well, to describe the self-management and self-direction skills desired or required by the student.

- Bring reading, writing, and math samples that demonstrate your expectations / suggestions.

- If your agency serves very low-level learners and you do not have literacy entry requirements, then bring samples of student work from your agency that reflect common skill level.

- Remember to remove the student's name and other identifying information.

Agenda
Theme: Identifying Transition Skills

REVIEW

- Highlights from past meeting
- Today's agenda
- Today's outcomes

ENTRY SKILLS

- Exercise 1 (student profiles and agency target groups)
- Exercise 2 (entry requirements & desired skills)

WORKING TOWARDS AGREEMENT

- Exercise 3 (skills / tasks useful for transition)
- Exercise 4 (LBS level links with key referral partners)
- Exercise 5 (sharing samples)

WHERE DO WE GO FROM HERE?

- Next meeting: date, place, time
- Topic: Meeting theme
- Getting ready:
  - What should participants do to prepare?
  - What should the facilitators do to prepare?
- Evaluation

Exercise 1
Entry Skills

- Make a presentation on behalf of your agency, your site, and/or your specific program. Tell us about your students.

- Is there a specific target group? Do students, in general, share common needs? WHO do you serve? For WHOM are your programs designed? What students would be suitable for referral to your agency and/ or program? Why?

- Be sure to touch upon suggested or required LBS entry levels for students.

Facilitation Notes:
Exercise 1

- Set up as a large group activity.
- Have agency representatives make a presentation about the students they serve so that other participants may have a clear idea about WHO to refer from their agencies.
- If agencies have multiple programs / sites offering LBS training to specific target groups – ask presenters to talk about the range of programs offered and who might be interested in them. Encourage questions.
- Have presenters describe (in general terms) entry requirements (for example, LBS level).
- Watch for descriptions of, or references to, desired skills (rather than set requirements) that will help the student make a successful transition into the program of the referral partner.
- Use the presentations and follow-up discussions as a basis to reach agreement in later exercises about WHAT SKILLS are useful, HOW WELL they need/should be done by students, and HOW the skills might be assessed.

Exercise 2
Entry Skills

- Work in a small group with your key referral partner(s).
- Based upon the information presented by your key referral partner(s) in the previous exercise, clarify required SKILLS that a referred student MUST possess and DESIRED kills that would help the student succeed in a program.
- Make a list for each of your agencies. Try not to get hung up on too much detail about HOW WELL a student needs to perform the skill - just identify required or DESIRED skills for the student to have mastered.
- Be sure to include self-management and self-direction skills. For example: "It really helps if the student is able to work on his / her own for ten minutes on a task" or "The student needs to be able to work in a group."

Desired / required skills:

_____

_____

_____

_____

Facilitation Notes
Exercise 2

- Work in small groups of key referral partners.

- Clarify the difference between a REQUIRED skill that a student MUST possess ("able to read a text of paragraph at a LBS level 2") and a DESIRED skill that will help the student handle learning at the new agency/program and increase the likelihood of success ("able to show commitment to learning through regular attendance").

- Note that participants will have the opportunity to discuss expectations about HOW and HOW WELL the skills might be performed (i.e., assessment criteria, evaluation, quality of performance). Right now, they should simply establish a list of GENERAL entry skills that are desired or required. You may also wish to note that it is recognized that SPECIFIC skills are dependent upon each student's individual goal.

- Keep in mind that the purpose of this exercise is to provide a focus for developing a common understanding of assessment so that the task is manageable and practical. The exercise is meant to concentrate efforts upon those areas and skills most important to key referral partners -- that is, where they "link" - rather than discussing assessment in a broad, theoretical way across the full range of domains, skill sets and levels.

Exercise 3
Working Towards Agreement

- Record on flip chart paper the list that you developed in the previous exercise for your specific agency or program.

- Keep your list as simple as possible, focusing upon the skills that are most important!

- Post flip chart for large group to see.

- Make a brief presentation to the large group. Be ready to answer questions from participants. Tell WHY you've chosen these skills - HOW they are helpful to a student entering your agency/program.

- Differentiate between those skills that are REQUIRED by the student, and those that are HELPFUL!

- Listen to the other presentations. Watch for common entries. Are there skills that keep "reappearing"? Are there common themes?

Facilitation Notes
Exercise 3

- Have participants post their flip chart lists. Depending upon what's most useful to the group as a whole (and its participant composition), organize HOW the lists are posted for ease of analysis and comparison. For example, you may wish to post flip charts by sector, so that a view emerges of the skills required for entry into or participation at a 1-1, school board or college program. You may also organize the flip charts by community, or LSP areas, or agency.

- Note that some agencies (i.e. 1-1 serving very low level learners) will probably not have minimum skill level requirements. Focus for these participants might be on understanding what's required by their key referral partners.

- Have participants make brief presentations to the large group. Then ask participants to identify common skills or themes that emerged. Make a Master List. Discuss. Which items are most important to the group as a whole? Why? Earmark these skills for further discussion/analysis.

Exercise 4
Working Toward Agreement

- Work in small groups of key referral partners. Identify the LBS levels around which your agencies tend to "link."

- For example, let's say your agency delivers 1-1training to primarily low-level learners. A key referral partner is a school board LBS program with a minimum literacy requirement that the student be working at a LBS level 2. That's the level your students need to achieve (in keeping with their goal) to be able to enter your key referral partner's program. That's where you "link. "

- If your key referral partner doesn't have a minimum literacy requirement, then either identify a DESIRED or RECOMMENDED level where students will have a good foundation for success OR identify the LBS level where most of your students presently make the transition to the new agency.

LBS LEVEL(S) WHERE OUR AGENCIES LINK:

_____

_____

_____

_____

Facilitation notes
Exercise 4

- Discuss why it is important that key referral partners have a shared understanding of assessment of the LBS levels where they "link"! Think in terms of student transition.

- Note that it is at these levels (and the skills that they have highlighted as key to successful student transition) where participants will now focus efforts in developing a common understanding of assessment.

- Have participants work in small groups of key referral partners to identify the LBS levels where they "link."

- If participants can't identify a minimum skill level, or the task isn't relevant to their programs, they may wish instead to identify a DESIRED or RECOMMENDED level where students will have a good foundation for success.

- Another option is to identify the LBS level where most of their students presently make the transition to each other's program.

Exercise 5
Working Toward Agreement

FIRST

- Share the reading, writing, and math samples you've brought from your agency. Look at the samples brought by your key referral partner(s).

- Compare the samples to the list of skills you developed in the previous exercise.

- IN GENERAL, do the samples demonstrate the skills on your list to the proficiency required or desired for entry into your program? Which ones do? Which ones do not?

- Relate to the LBS levels where you link. Do you and your key referral partner(s) agree the samples are reflective of these levels?

- Note those skills/LBS levels where you and your key referral partner(s) disagree or have questions so that you can work further on these areas.

WE NEED TO WORK FURTHER ON...

_____

_____

Exercise 5
Working Toward Agreement

THEN...

- There are probably things you need to know about HOW a student did a particular piece of work before you can decide whether it meets the criteria for entry into your program, or demonstrates student work reflective of a specific LBS level.

- For example: "How much help did the student have? Is this a first draft or final draft? How long did it take the student to complete the work?"

- Make a list of the questions.

- Be ready to report to the large group. Around what LBS levels do your agencies "link?" Did you agree (in general) about the samples? Where do you need further work before you can agree? What questions do you need answered about the sample?

QUESTIONS:

_____

_____

_____

_____

Facilitation Notes
Exercise 5

- Have participants work in small groups of key referral partners for the start of the exercise. Encourage participants to ask each other questions about the samples in light of the skills highlighted in the previous exercise. How do samples compare to or reflect this list?

- Next have participants compare their understanding of the LBS levels. For example, "You've brought a sample of student writing. Let's say your key referral partner's entry requirement for writing is LBS level 2. Does the sample reflect the skill required/desired for entry into your key referral partner's program? Discuss and come to agreement about it if you can. "

- Participants will naturally begin to talk about criteria for evaluating the QUALITY of a piece of work. That's good! However, let them know that they'll be examining these areas in more detail at the next meeting, so it's fine to talk in general terms. In fact, it might be more useful for the next meeting to establish the QUESTIONS they have and the specific samples/skills where they disagree.

- Bring back to the large group. Discuss together where agencies "linked."

- Make a Master List of the TYPES of questions participants needed answered before they could assess/evaluate a piece of student work. Note that the group will be using these questions to help guide their assessment of the levels / skills where they link, and coming to shared understanding of criteria for evaluating quality.

Post Meeting

FACILITATOR'S THOUGHTS (in hindsight)

- This meeting moved participants from a "big picture" view of assessment to beginning to examine how agencies assess and evaluate specific literacy skills and LBS levels. In a sense, a "task analysis" approach was applied throughout the course of the meetings. Participants first worked towards agreement on broader issues surrounding such items as Training Plans and content areas of Initial Assessments, and now narrowed the focus to a more specific analysis of assessing and evaluating skills.

- There was still a need, however, to maintain a balance between the general and specific. Shared agreements had to be workable in frontline situations or they wouldn't be used. They required flexibility to accommodate individual students, goals, and programs. They also had to recognize the professionalism of literacy staff to make sound decisions, and leave manoeuvrability that allowed them to do so.

- Like the LBS Learning Outcomes, work around common assessment needed to result in decisions that offered guidelines and provided a framework. It was not so important that participants agreed about each "success marker" and what it "looked like," but rather, that their assessment results were in the same "ballpark" and compatible with each other. In other words, participants worked towards an understanding, in general, of what to look for, and how to carry out assessments in a way that would facilitate movement among their agencies and prepare students for the "next-step" in their plans.

- Agencies had previously participated in a Network project involving student referral and transition. It was natural, therefore, for this previous work to be reflected in the group's approach to the task of developing a common understanding of assessment. Participants looked at how assessment processes would "fit together" in order to facilitate student movement. This portion of the series of meetings followed the same tact. Participants worked to develop an understanding around those areas/levels/skills that would help the student prepare to make successful transitions.

- In both projects (student referral/transition and developing a common understanding of assessment), the domains of self-management and self-direction were "hot topics" that arose repeatedly. These skills were often viewed as more pivotal than literacy level and proficiency in a student's success in making a transition among agencies. An important part of developing a common understanding of assessment, therefore, became acknowledging the importance of self-management and self-direction, and incorporating these skills into assessments and learning plans.

- Focusing on areas/levels/skills where students commonly made transitions among agencies made the overall task of developing a common understanding of assessment manageable. Trying to come to a shared understanding across the range of domains / LBS levels seemed unwieldy, overwhelming, and impractical. For example, it wasn't really pressing whether participants had a shared working knowledge/ understanding of LBS levels 4 & 5, since the majority of their students were not working at these levels. In reality, it wasn't possible to cover "it all," nor even necessary to try. Participants had only so much meeting time and energy to give, and perhaps even patience. It was important to use time carefully – to get, in a sense, the most "bang for the buck". For this reason, exercises were designed to focus effort on those areas that would have a practical, visible benefit to front-line staff and their students. This was accomplished by concentrating efforts on those areas/levels/skills where agencies "linked".

- In one LSP area, key referral partners had no difficulty with the task of identifying LBS levels/skills where agencies "linked". For example, in general, the school board LBS classes required LBS Level 2, and the college LBS classes required LBS level 2/3, depending upon the domain, goal, and the self-management/self-direction abilities of the individual student. The 1-1agency served many low level learners working at LBS levels 1-2, so "links" were easily defined.

- Difficulties arose in the other LSP area, where both school board programs commonly accepted students working at LBS level 1.In this case, key referral partners could not agree, even in general terms, upon skills/levels required for students making the transition from 1-1 programs to the school board classes.

- The task, therefore, was shifted to listing desired or helpful skills that would facilitate student success when making a transition from the 1-1 program to a school board class. One of the two school board programs still had difficulty with the task, fearful that the discussion would result in students NOT being referred or entering their program because they didn't have adequate skill levels. The college LBS programs identified entry requirements at LBS level 2/3, depending upon the program and individual student.

Sample Participant Evaluation

1. Overall, how useful was today's meeting?

Very Useful	Somewhat Useful	Not Useful	Useful

2. Do you feel that you have an understanding of the general entry requirements of key referral partners?

YES NO

3. Do you feel that you have had an adequate opportunity to communicate your agency's expectations?

YES NO

4. Have you and your key referral partners identified the LBS Level where your agencies link? Are you comfortable accepting these levels? If not, what would make it possible to accept them?

5. After today's meeting, I feel confident that I can help learners enter another LBS agency for further training.

- ❒ I strongly agree with this statement
- ❒ I agree with statement
- ❒ I disagree with this statement
- ❒ I strongly disagree with this statement

Theme: Assessing Transition Skills

FOCUS

- Assessing/evaluating transition skills -- HOW and HOW WELL they need to be performed

DESIRED OUTCOMES

- Participants identify/agree upon transition skills by LSP area, sector , and/or Network (rather than simply by individual agency/site).

- Participants reach a common understanding about assessing these skills for LBS Level(s) where their agencies "link".

- Participants commit to communicating the agreements reached at the "developing a common understanding of assessment" meetings to frontline staff and others at their agency

Getting Ready

PARTICIPANT HOMEWORK

- Bring samples that demonstrate the TRANSITION SKILLS identified by your agency/ site/ programs in the previous meeting.

- Bring STUDENT WORK from your program that you think demonstrates the transition skills identified by your key referral partner(s), or for which you'd like more clarification.

- Be ready to discuss the samples in terms of the LBS levels where your agencies link.

- Remember to remove the student's name and other identifying information.

Agenda
Theme: Assessing Transition Skills

REVIEW

- Highlights from past meeting
- Today's agenda
- Today's outcomes

REVIEW PAST WORK

- Exercise 1 (Skills List & Questions)

ASSESSING PERFORMANCE: HOW and **HOW WELL**

- Exercise 2 (Reading)
- Exercise 3 (Writing)
- Exercise 4 (Speaking and listening)
- Exercise 5 (Numeracy)
- Exercise 6 (Self-management/Self-direction)

WHERE DO WE GO FROM HERE?

- Next meeting: date, place, time
- Topic: Meeting theme
- Getting ready:
  - What should participants do to prepare?
  - What should the facilitators do to prepare?
- Evaluation

Exercise 1
Review Past Work

FIRST ...

- Review the list(s) of required/desired transition skills developed at the last meeting.

- Take note of the skills the group had identified as "most important". These are the skills you will now focus on exploring further so that you and your key referral partner(s) agree upon HOW to assess these skills, and HOW WELL the student may perform them.

THEN ...

- Review the list of questions that you developed at the previous meeting around what you'd need to know about HOW a student did the sample work BEFORE you could assess whether it met entry requirements for your program.

- IN GENERAL TERMS, add to the list. What other considerations / questions might you have? What else might you look for when assessing HOW or HOW WELL the student does/did the work?

- Use these questions to help guide your discussions / decisions for the remainder of the exercises.

- Through these exercises, you'll develop with your key referral partners (and perhaps for your entire LSP area or Network) a common understanding of assessment for the skills that you have highlighted.

Facilitation Notes
Exercise 1

- This exercise might be done in conjunction with reviewing the highlights of the previous meeting. As PREP for Exercises 2-6, have participants look at the list oftransition skills (required or desired) and the list of assessment questions produced at the previous meeting. Do this as a large group activity.

- For ease of reading and discussion, you might have previously reorganized the skills list to suit the needs of the participants and common themes that have emerged. For example, if there are several agencies/programs from the same sector, and many of the skills they've identified with their key referral partners are similar, is it possible to combine the items and make a single list of transition skills for a community or LSP area as a whole? Can all the school board LBS programs, for example, agree upon the same general transition skills? And/or college programs?

- Give participants a chance to edit/clarify the transition skill list, but try not to get "hung up" on the task. Emphasize that the list is simply a platform to do the next step – further develop a common understanding of assessment – by focusing on skills they've highlighted as important. The lists aren't mandatory, but guidelines/suggestions.

- Next review the QUESTIONS developed by participants about HOW a student did a particular piece of work. Relate, in general, to assessment/evaluation. Brainstorm other GENERAL questions or considerations that MIGHT be addressed in assessing a piece of work. Ask participants to use the list to help guide their work in Exercises 2-6.

Exercise 2
Assessing Performance: How and How Well
Read with Understanding for Various Purposes

- Work in a small group with your key referral partner(s).
- Look at the transitions skills list. Together choose a skill (or a group of related skills) that would fall under the LEARNING OUTCOME "READ WITH UNDERSTANDING FOR VARIOUS PURPOSES".
- Create and agree upon a list that describes HOW or HOW WELL a student is expected to perform the skill or task to make a smooth transition among your agencies.
- Use the samples you've brought to help clarify and guide your discussions and decisions.
- Refer to the LBS Learning Outcomes success markers/skill sets to HELP describe your expectations, although don't feel LIMITED to their use alone.
- Keep your list easy to understand and apply! It should describe expectations so students are better prepared for their "next step", and assessors/ instructors can better help them get there!
- Be ready to report to the larger group

Learning Outcome:
Read With Understanding for Various Purposes.

What SKILL have you chosen?

Assessment guideline for student performance ...

HOW or HOW WELL should the skill(s) be performed?

_____

_____

_____

_____

_____

_____

This list is a guideline for transition among what programs/agencies?

What is the corresponding LBS level (where your programs "link")?

Exercise 3
Assessing Performance: How and How Well
Write Clearly To Express Ideas

- Work in a small group with your key referral partner(s).
- Look at the transitions skills list. Together choose a skill (or a group of related skills) that would fall under the LEARNING OUTCOME "WRITE CLEARLY TO EXPRESS IDEAS".
- Create and agree upon a list that describes HOW or HOW WELL a student is expected to perform the skill or task to make a smooth transition among your agencies.
- Use the samples you've brought to help clarify and guide your discussions and decisions.
- Refer to the LBS Learning Outcomes success markers/skill sets to HELP describe your expectations, although don't feel LIMITED to their use alone.
- Keep your list easy to understand and apply! It should . describe expectations so students are better prepared for their "next step", and assessors/ instructors can better help them get there!
- Be ready to report to the larger group.

Learning Outcome:
Write Clearly To Express Ideas

What SKILL have you chosen?

Assessment guideline for student performance ...
HOW or HOW WELL should the skill(s) be performed?

_____

_____

_____

_____

_____

_____

This list is a guideline for transition among what programs/agencies?

What is the corresponding LBS level (where your programs "link")?

Exercise 4
Assessing Performance: How and How Well
Speak and Listen Effectively

- Work in a small group of your key referral partner(s).
- Look at the transitions skills list. Together choose a skill (or a group of related skills) that would fall under the LEARNING OUTCOME"SPEAKAND LISTEN EFFECTIVELY."
- Create and agree upon a list, that describes HOW or HOW WELL a student is expected to perform the skill or task to make a smooth transition among your agencies.
- Use the samples you've brought to help clarify and guide your discussions and decisions.
- Refer to the LBS Learning Outcomes success markers/skill sets to HELP describe your expectations, although don't feel LIMITED to their use alone.
- Keep your list easy to understand and apply! It should describe expectations so students are better prepared for their "next step", and assessors/ instructors can better help them get there!
- Be ready to report to the larger group.

Learning Outcome:
Speak and Listen Effectively

What SKILL have you chosen?

Assessment guideline for student performance ...
HOW or HOW WELL should the skill(s) be performed?

_____

_____

_____

_____

_____

_____

This list is a guideline for transition among what programs/agencies?

What is the corresponding LBS level (where your programs "link")?

Exercise 5
Assessing Performance: How and How Well
Numeracy

- Work in a small group of your key referral partner(s).
- Look at the transitions skills list. Together choose a skill (or a group of related skills) that would fall under the DOMAIN: NUMERACY.
- Identify the related "Learning Outcome".
- Create and agree upon a list that describes HOW or HOW WELL a student is expected to perform the skill or task to make a smooth transition among your agencies.
- Use the samples you've brought to help clarify and guide your discussions and decisions.
- Refer to the LBS Learning Outcomes success markers/skill sets to HELP describe your expectations, although don't feel LIMITED to their use alone.
- Keep your list easy to understand and apply! It should describe expectations so students are better prepared for their "next step", and assessors/ instructors can better help them get there!
- Be ready to report to the larger group.

Domain:
Numeracy

What SKILL have you chosen? Related Learning Outcome?

Assessment guideline for student performance ...
HOW or HOW WELL should the skill(s) be performed?

_____

_____

_____

_____

_____

_____

This list is a guideline for transition among what programs/agencies?

What is the corresponding LBS level (where your programs "link")?

Facilitation Notes
Exercises 2 – 5

- Have participants work in small groups of their key referral partners.

- In preparation for this meeting, it might help to group similar skill descriptions under specific learning outcomes. This organizes the list so that the work done by a small group is applicable to a larger segment of participants, and will expedite shared understanding across a LSP area or Network.

- For example, let's say one group of key referral partners has identified "Write a simple paragraph or journal entry" as a transition skill. Another group identifies: "Write <;l group of related sentences on a topic of personal interest", and still another, "Students express through writing a bit about themselves." These are easily discussed together, and a common list of assessment guidelines developed relevant to them all.

- Depending upon the number of participants and time limitations, you may wish to assign each small group ONE exercise to focus on, rather than have ALL groups do EVERY exercise.

- Small groups present their assessment guidelines to the larger group and share related student work. Flip chart lists. discuss: What clarifications are needed? Has the list taken into consideration the assessment QUESTIONS from the previous exercise? Can the larger group accept and use this list, too?

Exercise 6
Assessing Performance: How and How Well
Self-Management / Self-Direction

- Think about the SELF-MANAGEMENT and SELFDIRECTION skills you and your key referral partner have identified as important transition skills for a student moving among your agencies.

- Now check the assessment guidelines you have created together. Do they incorporate or reflect these self-management/self-direction skills?

- If not ,can you make additions or clarify the guidelines so that self-management/self-direction is included?

- Can you agree upon a few other strategies to incorporate self-management/self-direction skills into a student's learning program and assessment?

STRATEGIES

_____

_____

_____

_____

_____

Facilitation notes
Exercise 6

- As a large group, have participants examine the transition skill list for self-management / self-direction skills that they identified as desired or required.

- Then have participants think about the assessment guidelines they've created for the other Learning Outcome areas. Have the guidelines incorporated self-management/ self-direction? Where? How? If not, can they? Re-word or edit accordingly.

- Let's say the group has identified the need for a student to be able to work independently. Have the guidelines incorporated this ability into the descriptions? Has HOW the assessment is being carried out or set-up facilitated evaluation of this self-management skill?

- One way to accomplish this, for example, might be a time requirement. The student might be asked to read on his or her own for ten minutes, and then "retell" what he/she has read. Another way might be to limit the amount of HELP the student receives. The evaluation then revolves around whether the student applied strategies that allowed him/her to continue with the task, even if "stuck" on one particular part.

- Next identify what self-management skills/self-directions can't be incorporated into the assessment guidelines. Develop strategies and agreements as a group: how will participants facilitate students learning these skills? How will they evaluate for student self-management/ self-direction?

Post Meeting

FACILITATOR'S THOUGHTS (in hindsight)

- The simple act of participants discussing samples of student work, assessment criteria, and evaluation worked towards developing a shared view of assessment. Whether people agreed wasn't as important as having the opportunity to ask questions of each other, compare experiences and assessment results, and hear about how other programs evaluated students' work.

- As might be expected, the exercises helped to build common understanding among participants from different agencies. Interestingly, they also facilitated discussion and common understanding among front-line staff from the SAME agency. Differences existed from program to program, and from site to site. These differences pointed out the need for agencies to create opportunities for their staff to explore assessment among themselves and to develop an agency-wide consistency.

- LBS levels, Learning Outcome descriptions such as success markers, and samples of student work were used to support discussion among participants, rather than drive or initiate it. For example, the task wasn't to say "our agencies link at LBS level 2, and therefore, this is what students must be able to do". Rather, it was to say, "these skills will facilitate a student's success in our program", and then describe performance and link expectations to the LBS levels and Learning Outcomes.

- In LBS training, the student's goal is central and defines the learning plan, assessment, and evaluation. Common assessment agreements and/or tools need to have flexibility in order to be relevant to a variety of situations, demonstrations and goals. The assessment guidelines developed by the participants are flexible in application and simple, which should increase the likelihood of their being used on a front-line basis.

- It was originally thought that samples might be distributed to illustrate expectations, cross referenced to LBS levels and success markers. The samples, however, caused more confusion than clarification. Student work is difficult to evaluate out of context, and perhaps, shouldn't be evaluated in that way. GENERAL statements were more useful in developing a common understanding of assessment than deciding upon specific "rules" or samples that would become models.

- Having said that, it was useful for agencies that served students with higher literacy levels to bring samples to illustrate what a student might be expected to read and write at the program (rather than to use the samples as models for assessment). Similarly, it was useful for participants who commonly worked with students at higher levels to see samples from students at the lower levels. The gap in skill level, at times, offered a needed reality check.

- Participants focused on the Communications domain. The exercises presented in this model do not explore Learning Outcomes for Numeracy in detail. The exercises/ process, however, may be adapted to focus on these skills and outcomes.

Sample Participant Evaluation

1. Overall, how useful was today's meeting?

Very Useful	Somewhat Useful	Not Useful	Useful

2. Do you feel that you and your key referral partners have a clear understanding of the main skills or tasks/activities that a student needs to perform when moving among your agencies?

YES NO

3. Do you have an understanding of how well the student needs to perform these?

YES NO

4. Are there any other tasks/activities that you think would improve your understanding of other agencies' entry requirements?

5. After today's meeting, I feel confident that I can help learners enter another LBS agency for further training

- ❒ I strongly agree with this statement
- ❒ I agree with statement
- ❒ I disagree with this statement
- ❒ I strongly disagree with this statement

Theme: The Agreements

NOTE: This meeting consisted of a larger group than previous meetings. Front-line LBS instructors, assessors, coordinators, and intake staff throughout the Network area were invited to attend, as well as the original participants involved in designing the common assessment agreements.

FOCUS

- Sharing agreements with front-line literacy staff across the Network area, inviting their input and participation for implementation.

DESIRED OUTCOMES

- Participants have reached a common understanding of assessment in those areas highlighted by them as most important.

- Participants express their common understanding of assessment through a series of agreements.

- Participants communicate these agreements to frontline staff and others at their agency, and develop strategies to implement them.

- Participants establish performance indicators to measure the success of the agreements and their implementation

Getting Ready

PARTICIPANT HOMEWORK

- Invite front-line staff from your agency to attend the meeting! The more, the merrier! Spread the news to LBS instructors, assessors, coordinators, and intake / support staff!

- Ensure that there are representatives in attendance from each site and program that offer LBS training through your agency.

- This final meeting in the common assessment series is "opened up" to include front-line staff members who have not participated in the previous meetings.

- The purpose: to communicate the "common understanding of assessment" agreements to a broader Network audience; to ensure these agreements are communicated to and understood by the staff who will implement them on a "front-line" basis.

Agenda
Theme: The agreements

REVIEW

- An overview of the process and goals
- Today's agenda
- Today's outcomes

GETTING TO KNOW EACH OTHER

- Exercise 1 (Referral Pathways)

REVIEWING THE AGREEMENTS

- Exercise 2 (Initial Assessment, Using each other's assessment results, Training Plans)
- Exercise 3 (Transition Skills, assessment)
- Exercise 4 (Communication, implementation)

WHERE DO WE GO FROM HERE?

- Participants
- Facilitators
- Evaluation

Exercise 1
Getting to Know Each Other

FIRST ...

- On the piece of paper you've been given, write down the name of your AGENCY your PROGRAM where you deliver LBS training, and the SITE/COMMUNI1Y.
- Post.
- Walk about the room reading the various postings.
- Identify one that you'd like to known more about!
- Find the person who POSTED the information. Introduce yourselves. Tell each other about your programs and what you do at your agencies.

My Agency: _____

The Site/Community: _____

The Program:_____

Exercise 1
Getting to Know Each Other

THEN ...

- Now create an imaginary student whose "next step" in literacy training involves a transition between your programs.

- Decide upon a feasible scenario.

- Consider: Student goal, special needs, location, program target group, set-up, or other reasons which would make the move "right" for the student.

- Be ready to introduce each other to the group, and describe the "referral pathway" you've created for the imaginary student.

Facilitation Notes
Exercise 1

- Although this is the final in the series of the "developing a common understanding of assessment" meetings, a get-to-know exercise is still important! Since this meeting is "opened up" to a broader audience, many of the participants will be attending for the first time. If your Network area is large, then participants may not know each other, nor be aware of each other's programs.

- The activity provides a context for the rest of the meeting - why the agreements are important. The "scenarios" serve to detail practical situations where a common understanding of assessment is useful and applicable on a front-line basis.

- Provide paper (8.5" X 11"), magic markers, and masking tape.

- Encourage participants to choose a "posting" with which they aren't too familiar!

- Give ample time for mingling and sharing introductions.

Exercise 2
Reviewing the Agreements

- Work in a small group of participants from agencies who offer LBS training in your community.
- Discuss the agreements made by your agency representatives at previous meetings concerning INITIAL ASSESSMENT, using assessment RESULTS, and TRAINING PLANS.
- What changes or clarifications to the agreement do you suggest? Can you formulate concrete realistic performance indicators for this agreement? Is there more information you need to implement the agreement? How might you implement it at your agencies?
- Be ready to present your group's ideas.

CHANGES & CLARIFICATIONS

_____

_____

PERFORMANCE INDICATORS (how will we know we have done it?)

_____

_____

Facilitation notes
Exercise 2

- You'll need to prepare beforehand a booklet or other written materials that outline agreements made at past meetings. Present the agreements in a logical way that promotes ease of reading and discussion. Note that the order in which the agreements were REACHED isn't necessarily the best way to organize them now! The highlights and minutes from previous meetings should contain the information needed to formulate the wording of the agreements, if the group hasn't been doing this all along. For sample agreements, see the attachment at the end of this section.

- Organize the set-up of the exercise according to the number and complexity of the agreements to be presented, the number of participants, and time available.

- One idea is to divide participants into small groups, and assign each group a different agreement. Participants work through Exercise 2, and then gather into a large group. Each small group starts/leads the discussion in turn. Participants reach consensus about changes and clarifications that need to be made to an agreement, and formulate /agree upon performance indicators, if applicable.

- Organize small groups according to community, so that key referral partners will work together. Include participants from different sectors. Ensure each small group has at least one participant who has been involved in the previous meetings and has worked to DEVELOP the agreement. Ask This person to take a leadership role by answering questions about WHY/HOW the agreement was reached.

Exercise 3
Review the Agreements

- Work in a small group of participants from agencies who offer LBS training in your community.
- Discuss the agreements made by your agency representatives at previous meetings concerning TRANSITION SKILLS and ASSESSMENT of these skills.
- What changes or clarifications to the agreement do you suggest? Is there more information you need to implement the agreement? How might you implement it at your agencies?
- Be ready to present your group's ideas.

CHANGES & CLARIFICATIONS ...

_____

_____

MORE INFORMATION IS NEEDED

_____

_____

Facilitation notes
Exercise 3

• As with the previous exercise, organize set-up according to the needs of the group and the agreements to be reviewed.

• Since Exercise 3 directly involves assessment of skills - the HOW and HOW WELL - it will probably take group members longer to work through the agreements than it took for Exercise 2.

• One approach is to organize the transition skills and assessment guidelines/agreements by Learning Outcome. Assign each small group a different outcome area to discuss and present to the larger group.

• Modify and clarify the agreements and guidelines as required.

• Create a Master List of the areas where participants express the need for more information. Use the list for further Network-wide initiatives or training sessions.

• This exercise doesn't specifically ask participants to create performance indicators. If performance indicators arise from the discussion, add them to the agreements where relevant.

Exercise 4
Reviewing the Agreements

FIRST ...

• Brainstorm ways in which you can ensure the agreements reached through this process STAY *ALIVE*.

• Think of practical REALISTIC ways to maintain and implement the agreements on a front-line basis among key referral partners, and wherever possible, across the Network area.

OUR IDEAS

_____

_____

_____

_____

Exercise 4
Reviewing the Agreements

THEN...

- Decide as a group which ideas you will implement at all of your agencies.
- Write what you decide to do as an agreement!

WE AGREE:

_____

_____

_____

_____

Facilitation Notes
Exercise 4

- Work in a large group.
- Use this exercise to bring a sense of closure and summation to the meetings.
- Note that the agreements are only useful if they are ACTUALLY USED by front-line staff in day-to-day operations at their agencies.
- The ultimate purpose of developing a common understanding of assessment is to help agencies better serve the needs of their students, and facilitate students' efforts to reach their goals.
- Formalize what participants/agencies will do to communicate, implement, and maintain the agreements, and what the facilitators or Network will do to complete their part of the process.
- For example, the facilitators or the Network may agree to publish the assessment agreements, and agencies may agree to distribute them to each front-- line staff member

Post Meeting

FACILITATOR'S THOUGHTS (in hindsight)

- Structuring the results of the meetings into statements of agreement was the vehicle used to record joint decisions and common understandings, and communicate them. These agreements were the product or OUTCOME of the discussions and work of the group members. Agreements were kept simple, with "check-mark notes" added to clarify each agreement to ensure meaning and intent was preserved, and to emphasize flexibility.

- Communication of the agreements on a broad basis was paramount to the "next-step" of the project. It didn't matter how hard the original participants worked to reach a shared understanding of assessment, or how sensible and useful the product if the agreements were not APPLIED on a front-line basis -- first among key referral partners, and then within the greater Network area.

- The challenges of keeping the agreements alive were apparent even in the process of the meetings themselves. The meetings were spread over an eight month period. The planning meeting occurred in February, the five "working meetings" occurred from March to May, and the last "follow-up" meeting occurred. in October. In that time, staff at agencies changed, with people leaving for new jobs and others taking their places. That meant the agency representatives changed throughout the course of the project as well.

- At two agencies, NONE of the original participants worked at the agency at the time of the final meeting. The staff in attendance at the final "follow-up" meeting were ALL new, and some, new to the literacy field. Similarly, since there were seven meetings in total, sometimes an agency representative couldn't attend a meeting, whether for illness or another reason, and may or may not have found a replacement. Since the discussions were interconnected (reflective of the tasks and issues surrounding assessment itself!), decisions made at one meeting were often dependent upon the decisions made at the previous meeting. Reaching a common understanding of assessment was a "building" process, and involved layers of understanding.

- The same kinds of changes/challenges needed to be taken into account when planning ways to implement and communicate the OUTCOME or PRODUCT of the common assessment project. Staff change. New staff is hired, sometimes with little experience. Add to the mix the fact that front-line instructors often work in isolated situations, their program at a site where there is little interaction with other LBS agencies and literacy staff.

- Front-line application was a factor in keeping the agreements (as well as performance indicators) simple. It was important that the agreements did not ADD a new layer of work to front-line staff who often already feel overwhelmed. But neither was "extra work" necessary-- harder work or "more of it" doesn't intrinsically make something better! The agreements involved tasks, methods, and tools that LBS staff, students, and agencies were already using. They did not include new demands but rather promoted a shared understanding about how to USE common tools (such a? the Training Plan),and COMMUNICATE assessment results in a consistent manner from agency to agency. They focused upon skills and proficiency levels that would aid the student in reaching their goals.

- Opening up the meeting to all front-line staff across the Network area was successful. It worked on several levels, first communicating the agreements to those who would need to use them on a front-line basis. As well, it gave staff from a variety of agencies and programs a chance to meet and discuss assessment, but also student transition - how their programs complemented each other and "fit" together. The introductory activity for this meeting, in particular, was useful and enjoyed.

- The meeting gave the working group the opportunity to "stand behind" their decisions in front of their peers, and therefore increased validity of the outcomes for the project. The common assessment agreements were not something that were "handed down" or imposed, but created by front-line staff who worked with learning outcomes and literacy students on a regular basis. They had come to the meetings on behalf of their agencies and colleagues, and brought to the table their experience. In a sense, the meeting put a "face" to the product and the process.

- Finally, it was a purposeful decision to focus upon participation of FRONT-LINE staff throughout the project process (and not just this last meeting). Managers and others who participate at the LCPP/LSP level (for the most part) did not attend, nor were the expected to come. It was important, therefore, that the managers gave front-line staff the POWER and RESPONSIBILITY to make decisions for their agency around the meeting table and the TIME to be able to participate fully. It was also important that managers actively SUPPORTED the project by ensuring that their agencies (and sites/programs) were well represented at each meeting, and letting their staff know that the work they were doing was a priority and meaningful.

Sample Participant Evaluation

1. Overall, how useful was today's meeting?

Very Useful	Somewhat Useful	Not Useful	Useful

2. Do you feel that you understand the agreements that have been reached concerning the Common Understanding of Assessment in Waterloo and Wellington LBS agencies?

YES NO

3. Do you accept the agreements that were discussed at today's meeting?

YES NO

4. Do you feel that your agency will be able to keep the agreements "alive"? Why or why not?

5. In your opinion. do the performance indicators that we have selected today give us adequate evidence that the agreements are being kept and implemented within and between agencies? Why or why not?

6. After today's meeting. I feel confident that I can help learners enter another LBS agency for further training.

- ☐ I strongly agree with this statement
- ☐ I agree with statement
- ☐ I disagree with this statement
- ☐ I strongly disagree with this statement

A Common Understanding Assessment
Waterloo – Wellington Agreements

NOTE: Included on the following pages are the agreements reached by participants from Waterloo Region and Wellington County.

These are offered here as SAMPLE agreements only. Another Network or group of key referral partners who work through the process of developing a common understanding of assessment using the same meeting themes and exercises is encouraged to reach their OWN agreements according to the needs of their community.

Agreement #1

Prospective students are assessed to see if an agency is best suited to serve them, and if it is not, they are referred to the most appropriate agency.

- ✓ Each agency will do a referral or placement assessment as part of the entry/intake process or the initial assessment (i.e, Is this adult in the best place to meet his/her needs?)
- ✓ When the intake process involves non-LBS staff members, agencies will endeavor to ensure intake personnel understand and implement their responsibility for directing the potential student to the most appropriate agency .
- ✓ Information about WHERE to refer students (when in doubt) is available from Project READ Literacy Network.

PERFORMANCE INDICATORS

- ➢ Agencies track referrals they make and receive.*
- ➢ Tracking results are presented and discussed at the LCPP Committee on a regular basis.

Agreement #2

For those students participating in the LBS LEARNING OUTCOMES for the first time, the intake / initial assessment process includes:

- ✓ Referral or placement assessment (see Agreement #1)
- ✓ Goals (long-term and short-term)
- ✓ Skill levels (present student level; gap between present level and goal)
- ✓ Background info - employment/education history/transferable skills
- ✓ Needs/interests/learning styles

PERFORMANCE INDICATORS

- ➢ Completed Training Plans include/reflect the above items.

Agreement #3

Agencies accept and use the assessment results of other LBS agencies .

- ✓ This agreement applies to students who enter training at an LBS agency less than one year from the time of exit from another LBS agency or program.

- ✓ In these cases, the initial assessment process is NOT repeated in full. Agencies accept "as is" rather than reassess:
  - goal statements
    personal student data
  - training supports required information (e.g. child care, transportation, etc.)
  - learning style
  - LBS levels, although these may be reassessed briefly (rather than in full) to ensure placement in program is valid.

- ✓ Agencies may clarify information to ensure it is current .

- ✓ Agencies ensure a release of information form has been explained, agreed upon, and signed by referred students before information is passed among agencies. Sample release forms are available from Project READ Literacy Network.

PERFORMANCE INDICATORS

- ➢ A "Student Referral Cover Sheet"* is used to design the student's learning plan and requested from the previous agency if not received.

* See Agreement #9

Agreement #4

Self-direction and self-management skills are important aspects of literacy learning. LBS agencies help students gain these skills *I* and assess for them *I* as relevant to the individual's goal(s) .

- ✓ Front-line staff identified skills and abilities that help students make successful transitions among their LBS agencies. These include:
  - work independent~
  - get along with others
  - interact in a group
  - make decisions
  - be organized
  - attend regularly
  - arrive on time
  - complete assignments.

- ✓ Literacy level is sometimes secondary to self-management and self-direction, particularly if the student is moving into a classroom. Students with lower reading, writing, and numeracy skills may successfully make the transition to an agency's program if he or she has effective self-direction and self-management skills .

- ✓ Agencies that plan to refer students to a classroom as the "next-step" will work to help the individual gain self-direction and self-management skills.

PERFORMANCE INDICATORS

- ➢ Self-management and self-directions skills that have been demonstrated by the student are listed on the" Student Referral Cover Sheet"* accompanying the Training Plan.

* See Agreement #9

Agreement #5

Agencies help students prepare a learning portfolio. The student takes the portfolio to the LBS agency upon referral.

- ✓ Wellington County LBS agencies .have also agreed to include in the learning portfolio the student's demonstration activities from the exit assessment.
- ✓ The referring agency keeps a copy of the portfolio on file for a reasonable amount of time after exit in case the student misplaces his or her copy.

PERFORMANCE INDICATORS

- ➢ Agencies follow-up on student referrals to see if further information or clarification is required..

Agreement #6

When LBS levels are used to describe a student's literacy skill, they refer to the level in which the student is CURRENTLY WORKING .

- ✓ For example, let's say an agency has an entry requirement of Level 2 reading. This means that a student should be currently WORKING WITHIN level 2 on those learning outcomes/success marker areas relevant to his or her goal, not that he or she has already ACHIEVED level 2.

Agreement #7

The Training Plan is forwarded with the student .

- ✓ The student brings his/her Training Plan to the LBS agency.
- ✓ Agencies may forward the student's Training Plan directly if that student has signed a release of information form, and the student prefers that it be forwarded.

PERFORMANCE INDICATORS

- ➢ Referring agencies keep a copy of a student's Training Plan on file for a minimum of one year after exit.

Agreement #8

The Training Plan records LBS levels by learning outcome(s), and includes the exit demonstration(s) .

- ✓ The Training Plan records LBS levels by learning outcome(s) as relevant to the goal), rather than simply providing an overall LBS level.

Agreement #9

A referral cover sheet is included with the Training Plan of students being referred to a LBS agency .

- ✓ A common "Student Referral Cover Sheet" is used throughout Waterloo- Wellington (see next page).
- ✓ The" Student Referral Cover Sheet" provides the information agencies . require so they do not have to repeat the entire initial assessment process with a referred student. Front-line staff identified the information/categories on the referral cover sheet .
- ✓ (
- ✓ It is not mandatory that all of the information be completed. The student and referring agency make the decision about which information is relevant to the individual's learning.
- ✓ The "Student Referral Cover Sheet" includes the student's long-term goals and the goal path, particularly the role of the agency to which the student is being referred.

Waterloo Region/Wellington County
Student Referral Cover Sheet

Agency/Program where student referred: _____

Referring Agency: _____ Assessor's Name: _____

Student's Name: _____ Phone: _____

Address: _____

Caseworker: _____ Income Source ❑ Employment ❑ OW ❑ ODSP ❑ EI ❑ Other

Educational Background: _____

LBS Level at Exit: _____Reading _____Writing _____Speak/Listen _____Numeracy

Self-Direction/ Self- Management Skills: ❑ Works independently ❑ Attends regularly ❑ Arrives on time

❑ Completes assignments ❑ Organized ❑ Shows decision-making ❑Gets along with others ❑ Works well in a group

Learning Style: ❑ Visual ❑ Auditory ❑ Kinesthetic/Tactile ❑ Other _____

Date student entered program: _____ LBS Level at entry: _____

Number of hours of training per week: _____

LONG-TERM GOAL:

GOAL PATH:

1.
2.
3.
4.

Transferable Skills: _____

Health Issues: ❑ Vision ❑ Hearing ❑ Mobility ❑ Medication ❑ Other _____

Required Supports ❑ Transportation ❑ Childcare ❑ Other _____

Will the learner bring Portfolio? ❑ Yes ❑ No Exit Demonstration(s)? ❑ Yes ❑ No

Training Plan? ❑ Yes ❑ No

Additional Comments:

"I, _____, give permission for the release of information." ❑ **Yes** ❑ **No**
(print student's name)

_____

Student's Signature Date Assessor's Signature

Agreement #10

The following skill/task lists are used as a guide to help a student prepare for transition to a LBS agency.

Transition to LBS programs offered by the Wellington Centre for Continuing Education (school board):

- Read simple instructions and process them.
- Follow simple oral instructions.
- Do independent work.
- Write simple and compoundsentences.
- Write a group of related sentences on a topic of personal interest.
- Understand and apply basic math operations.
- Understand basic money concepts.
- Communicate orally in English.

Transition to LBS programs offered by the Waterloo Catholic District School Board or the Waterloo Region District School Board:

- Know basic phonics and the alphabet.
- Write name and address.
- Write a complete sentence.
- Read 2-3 basic sentences.
- Read and follow simple instructions.
- Follow simple oral instructions.
- Recognize numbers.
- Understand basic concept of adding and subtracting.

Waterloo Catholic District School Board also adds the following suggestions:

- Express through writing a bit about themselves.
- Write a simple paragraph or journal entry.
- Read a paragraph independently.

Transition to LBS programs offered by Conestoga College:

- Read and comprehend 1 to 2 pages of text.
- Follow instructions.
- Write paragraphs of 5 to 6 sentences with some accuracy.
- Basic numeracy operations, especially multiplication tables.
- Communicate orally in English

Agreement #10

- ✓ The skill/task lists were created by front-line agency staff and their key referral partners. They are meant to improve the likelihood of success of students making the transition from one LBS agency to another, and to develop a common understanding of assessment to better help a student reach a goal.

- ✓ The skills and tasks are not mandatory requirements, but offer suggestions .

- ✓ In a few cases, the suggested lists contain items that require a higher literacy skill than the minimum LBS level cited by the particular agency for entry. Discussion showed that there is a difference between MINIMUM literacy skills required for a referral and DESIRED or IDEAL literacy skills that will give the student a better chance for success

- ✓ Many students lack the self-management and self-direction skills to work successfully in their new learning setting. Students who are referred to an LBS agency "just meeting or not quite reaching" the required entry levels, but with good interaction skills, the ability to work independently, and a strong motivation, are more likely to succeed than students lacking these skills, but having higher literacy levels.

Agreement #11

The guidelines on the following pages are used to help assess skills and tasks outlined in Agreement #10 .

- ✓ Similar tasks suggested by different agencies within the same sector have been grouped together.
- ✓ Self-management and self-direction skills are included as part of the assessment description .
- ✓ The descriptions are not exit assessment requirements, but guidelines.
- ✓ Front-line staff discussed the LBS Level required / expected upon entry to their programs. With their key referral partners, they identified and focused upon developing a common understanding for those LBS levels where students most often make the transition among their agencies.
- ✓ The particular skills and tasks were chosen for further discussion because they offer a greater range for interpretation and show a continuum or progression of skill. (We simply didn't have time to look at ALL the areas - i.e. numeracy).
- ✓ As with all assessments for LBS training, the assessment tasks and expected proficiency level are goal-directed, and designed to fit the needs of the individual student.

Reading

LEARNING OUTCOME: Read with understanding for various purposes

DESCRIPTION
Read and comprehend a paragraph independently; read basic sentences; do independent work (transition to school board LBS programs).

RELATED LBS LEVELS:
Levell & Level 2 (Waterloo Region & Catholic District School Boards)
Level 2 (Wellington Centre for Continuing Education)

Assessment:

- ✓ Text has personal relevance to student and/or related to individual's goal.
- ✓ Some assistance can be provided .
- ✓ Student has a general overall grasp of text; when reading aloud getting some words wrong, or replacing some words, is acceptable .
- ✓ Student can "read and retell" - comprehends what he or she has read.
- ✓ Student can orally answer simple questions about what he or she has read.
- ✓ Student can read silently on own for ten minutes .
- ✓ Student takes initiative and moves along to another task, or another part of the same task, after 10 -15 minutes if "stuck" and help isn't immediately available.

DESCRIPTION
Read and comprehend 1- 2 pages of text (transition to Conestoga College LBS programs)

RELATED LBS LEVELS: Level 2 (Guelph Campus)
Level 3 (Cambridge & Waterloo Campus)

Assessment:

- ✓ Student is working at a LBS Level 2 (Guelph Campus),and LBS Level 3 (Cambridge & Waterloo Campus) as a minimum requirement.
- ✓ Student reads to follow instructions, such as those required to do a multiple choice test or exercise.
- ✓ Student demonstrates the *ability* to learn how to get help to complete a task, rather than simply sitting there .
- ✓ Student reads and works independently for approximately an hour.

Writing

LEARNING OUTCOME: Write clearly to express ideas

DESCRIPTION
Write a simple paragraph or journal entry; write a group of related sentences on a topic of personal interest; express through writing a bit about themselves (transition to school board LBS programs).

RELATED LBS LEVELS:
Level 1 & Level 2 (Waterloo Catholic & Region District School Boards)
Level 2 (Wellington Centre for Continuing Education)

Assessment:

- ✓ Student writes 2 or 3 sentences of personal relevance.
- ✓ Student completes the writing independently (not transcribed or corrected by a tutor or instructor) .
- ✓ Writing sample is first draft (and not polished or rewritten final draft) .
- ✓ Sentences do not have to be "perfect" (or even nearly perfect!) .
- ✓ More importantly, the student is able to express his or her idea(s) through the writing, and demonstrates the *confidence* to write independently, or is eager/willing to *try* in order to learn.

DESCRIPTION
Write paragraphs of 5 to 6 sentences in length with some accuracy (transition to Conestoga College LBS programs).

RELATED LBS LEVELS: Level 2 & 3

Assessment:

- ✓ Writing is logical; recognizable
- ✓ The quality / standard of performance required is linked to the student's goal, his or her reading and numeracy levels, and self-management and self-direction abilities .
- ✓ For example, a student able to read reasonably well and work independently may be successful with lower level writing skills upon entry

Following Instructions

LEARNING OUTCOME: **Speak and listen effectively**
Read with understanding for various purposes

DESCRIPTION
Follows simple oral instructions; reads basic instructions; reads simple instructions and processes them (transition to school board LBS programs)

RELATED LBS LEVELS:
Level 1 & Level 2 (Waterloo Catholic & Region District School Boards)
Level 2 (Wellington Centre for Continuing Education)

Assessment:

- ✓ Student is comfortable interacting / following instructions within a group setting .
- ✓ Student follows simple instructions, both written and oral.
- ✓ Student processes simple instructions from a variety of texts .
- ✓ Student comprehends what he or she reads, and can summarize.
- ✓ Student is familiar with BASIC common conventions of instructions in text; i.e., sequential numbering, bold print.

DESCRIPTION
Follows instructions (transition to Conestoga College LBS programs)

RELATED LBS LEVELS: Level 2 & 3

Assessment:

- ✓ Student is comfortable interacting / following instructions within a group setting .
- ✓ Student is able to apply instructions, both written and oral.
- ✓ Student completes the task in an appropriate amount of time .
- ✓ Student is able to develop the skill of knowing when to ask questions, and when to reread for clarification .
- ✓ Student uses skimming and scanning skills.

Agreement # 12

Each agency communicates to staff the agreements found within this document and encourages/facilitates their implementation.

- ✓ In particular, the agreements are communicated to front-line instructors, coordinators, assessors, intake personnel, and support staff (as relevant to their jobs).

PERFORMANCE INDICATORS

- Project READ Literacy Network prints and distributes the agreements to each LBS agency in Waterloo-Wellington.
- Each agency distributes the agreements to their front-line LBS staff, including assessors, instructors, intake personnel and others whose duties involve related responsibilities.
- Each agency ensures new LBS staff members receive the agreements and provide explanation as required.
- Annual training is delivered to front-line staff on common understanding of assessment (either Network-wide and/or within an agency).
- Opportunities are provided for front-line staff across the Network area to meet and discuss issues of common concern.
- Front-line staff members are surveyed annually to see if the agreements are being implemented.
- REFERRAL(and other issues concerning how LBS agencies work together) is a regular agenda item at LCPP meetings

Sample Participant Survey
Overall Progress

1. What features of the meetings you attended were the most helpful in developing your understanding and acceptance of common assessment in our region? Why?

2. What features of the meetings you attended were the least helpful in developing your understanding of common assessment in our region? Why?

3. Are there topics of concern that were not addressed? What were they?

4. Do you support the agreements that we have made around common assessment? Do you think they are manageable? Why or why not?

5. As a practitioner, do you have a plan for continuing to support the agreements we have made? What is it?

6. Has your agency developed a plan for continuing to support the agreements we have made? What is it?

7. Considering this project as a whole, what did you think of the effectiveness of the facilitation process used? Please feel free to comment on the facilitation model, the facilitator's performance, the timing and frequency of meetings, or anything else.

SCLN: Facilitation Model "B"

How-To Guidelines for Developing a Common Understanding of Assessment

CONTENTS

The Planning Meeting

FOCUS

The focus of this first meeting is twofold:

- First, establishing a comfort level among the group is critical.
- Second, participants must have a clear understanding of the project goals and a tentative path for reaching those goals.

DESIRED OUTCOMES

By the end of the meeting, the facilitator and participants should have:

- Introduced themselves and their organizations
- Developed an understanding of the purpose and goals of the common assessment project
- Discussed and agreed upon measurable and attainable group objectives for the project
- Agreed upon terms of reference for the committee and the facilitator
- Discussed possible subgroup working formats
- Established a level of comfort within the group to accommodate future discussions.

Getting Ready

PARTICIPANT HOMEWORK

- Participants should be forwarded copies of the project goals and expected outcomes.

- Participants should also be encouraged to begin collecting assessment tools used within their respective agencies.

FACILITATOR'S HOMEWORK

The facilitator should ensure that she/he has:

- Flip chart paper and markers
- Overhead project and overheads
- Refreshments
- Lunch arranged (if appropriate)
- Tools for recording meeting (video, audio, assistant with laptop or be prepared to have a participant record notes)
- Participant working binders (minimum2")

- The facilitator may also want to forward - in advance - any provincial document that will demonstrate to the participants the context within which their particular Common Understanding of Assessment project will fit (e.g. implementation schedule for Common Understanding of Assessment).

Agenda

Time: 3 to 4 hours

INTRODUCTIONS

- Committee/group go-around
- Today's agenda

PROJECT GOALS

- Significance of project locally and provincially
- Discussion of individual expectations and desired outcomes
- Identification of three to five primary objectives for the committee

TERMS OF REFERENCE

- Communication formats (between meetings)
- Expected roles of committee members
- Expected roles of facilitator
- Homework expectations (as set by committee)
- Travel claims and honoraria (if applicable)

TENTATIVE ACTION PLAN FOR REMAINDER OF PROJECT

- Small group composition and format
- Future meeting dates

WRAP UP AND NEXT STEPS

- Next meeting preparation plans - who needs to do what

EVALUATION

- Using a standard meeting evaluation form

Introductions

FACILITATOR'S NOTES

- According to this particular facilitation model, one of the first meeting's primary objectives is to increase the comfort level of participants. Therefore, the exercise used to have participants introduce themselves should set the stage for that level of comfort.

- Some participants may feel intimidated by the experience, knowledge or even personalities of other committee members. Therefore, it is important that the facilitator begin the project proceedings in an environment that is conducive to a sharing of information from all members.

- The facilitator may want to begin with a humorous exercise, overhead, story, etc. Similarly, if the facilitator is not a literacy practitioner, he/she may want to use the opportunity to highlight this distance and to begin establishing his or her role as a project facilitator and not evaluator.

Project Goals

FACILITATOR'S NOTES

- A discussion around the project goals need not (and perhaps should not) be long. Depending on how much information was sent out prior to the first meeting, this exercise should serve as a review and clarification of that information. However, the facilitator may want to emphasize two key points:

- First, she/he may want to highlight the particular region's project goals so that each committee member has a clear understanding of the project's direction. Subsequent discussions may ensue regarding the impetus for the project; however, it will be important for the facilitator to ensure that this does not become a venting free-for-all, especially given that the first meeting is heavily geared toward ensuring participant buy-in.

- Second, the facilitator mayor may not need/want to frame the project within the MTCU's directives for LBS reform. However, it may help participants to better appreciate the overall context of the project.

- A simple and concise way to facilitate these two points is through the use of overheads or flip chart paper with the project goals and provincial directives clearly outlined. Leaving these points visible for part or the remainder of the meeting may provide a useful visual reminder to the group (and the facilitator) of where their particular project is going.

- Upon completion of the project goals review, participants should be well prepared to present their project expectations and hopes. Each member of the committee should have the opportunity to indicate what she/he expects to achieve within the confines of the project goals. For example, some members may say "I want to have a better understanding of what each level means, "while others might say "I want to learn what other agencies are using for their initial or exit assessments."

- All responses should be written on flip chart paper. At the end, there should be some consistency among the responses so that the facilitator can identify commonalities. These similar responses can then be highlighted to the group and molded into more specific project goals and objectives using a template like the one on the following page.

- Based on the individual expectations presented, the SCLN group identified the following two major project goals:
    1. *To develop a basic understanding of what the different levels mean.*
    2. *To understand what a quality assessment should look like.*

The group further clarified these goals by agreeing that they would work towards achieving these goals by:

• Focusing on initial assessments only
• Focusing on Numeracy and Reading and address
Writing if there was sufficient time.

Project Goals and Objectives Worksheet

Project Goal #1	
Objective	**Details**
1	
2	
3	

Project Goal #2	
Objective	**Details**
1	
2	
3	

Project Goal #3	
Objective	**Details**
1	
2	
3	

Remember: Goals are fairly general statements, while objectives should be specific, measurable, attainable, realistic and time-limited

Terms of Reference

FACILITATOR'S NOTES

The terms of reference discussion should accomplish several things:

- Participants should identify and adopt their own roles and responsibilities for the project.

- The participants and facilitator should identify the responsibilities of the facilitator.

- Project specifics should be addressed and confirmed, including homework expectations, forms of communication, meeting dates and times, travel claims, etc.

- This section of the meeting is also critical for helping to build buy-in and for establishing a clear set of expectations for all committee members. It helps to alleviate assumptions about the roles and responsibilities of the participants and the facilitator.

- And finally, this discussion may provide an opportunity for setting any meeting ground rules to ensure that no individual feels threatened or intimidated. For example, it may be clearly articulated and recorded that participants will not judge the *quality* of any organization's assessment pieces. Comments like "Personally, I think that is a useless assessment resource" will be withheld unless specifically requested by the agency representatives.

Terms of Reference Checklist

Committee Members

Question	Y/N	Details
☑ What is an acceptable number of hours of homework between meetings?		
☑ Does the committee want substitutes in the event of absenteeism?		
☑ How much time is required between meetings to allow for adequate preparation?		
☑ Do we have all relevant and current contact information (including e-mail)?		
☑ What are the communication responsibilities to agency and community representatives?		

Facilitator

What will her/his roles and responsibilities be?

Roll / Responsibility	Details
☑ Setting meeting agendas	
☑ Time keeper and minutes recorder	
☑ Coordinator and distributor of information and resources	
☑ Referee	
☑ Other	

Terms of Reference Checklist

Project Specifics

Question	Y / N	Details
☑ What will be subsequent meeting dates and locations (including what to do during the summer)?		
☑ What will be the length of meetings (suggest a minimum of three hours)? Will they vary?		
☑ How are the meetings to be recorded (note-taker, video, audio)?		
☑ What communication methods will be used (including specific software systems to be used)?		
☑ How and when will information be distributed?		
☑ Are travel claims and/or honoraria to be processed after each meeting?		
☑ Are refreshment/meal and accommodation arrangements required?		

Tentative Action Plan

FACILITATOR'S NOTES

- To help ensure the committee budgets time appropriately and realistically, the facilitator should sketch out an action plan for the remainder of the meetings. For instance, if 12 meetings remain, the committee may want to commit to the following schedule:
    - **Meetings 2 & 3** - Agency Assessment Presentations
    - **Meeting 4** - Establishing an Assessment Review Model
    - **Meetings 5 to 10** – Reviewing Assessment Tools
    - **Meetings 11 to 12** - Presentations to Literacy Community.

- As part of this discussion, the facilitator may want to initiate a review of possible obstacles and solutions to those obstacles. Included in this may be "What do we do if we cannot agree on whether an organization's assessment is set at the appropriate level?"

- Additionally, the group should try to schedule the remainder of the project meetings, building into the action plan details and participant expectations for the amount of time required between meetings to complete homework duties.

- If possible, the facilitator should have members identify the working subgroups that will be formed. For example, the SCLN participants divided into Numeracy and Reading and Writing. The Reading and Writing group then further sub-divided into two groups: Levels 1 and 2, and Levels 3, 4 and 5. The composition of the subgroups will depend on the number of participants, agency representation and the project goals identified in the Planning Meeting.

Sample Action Plan Template

Task	Details	Who To Do	Who Else	When	Resources Needed

Wrap Up and Next Steps

FACILITATOR'S NOTES

- In preparation for the next meeting, a more detailed account of what is expected and required, as well as individual responsibilities, should be facilitated. The facilitator should record each decision and include in the notes so that there is no confusion about responsibilities. Questions to address would include:
  - *Who is going to do what and by when?*
  - *What resources will be needed before and for the next meeting.'*
  - *Who will be responsible for obtaining those resources?*
  - *Where and when will the next meeting be?*

- If the group decides to proceed with agency assessment presentations, the facilitator may want to identify a presentation format that each agency representative can follow to help her/him prepare and present. Specific information the group may want could be:
  - *Overviews of the assessment tools;*
  - *The process that learners go through when they complete an assessment;*
  - *The levels that each agency is serving through the use of the assessment tools;*
  - *Information about the criteria each agency uses to ensure a smooth transition to other agencies*
  - *What the differences are among the tools used by the different agencies.*

Evaluation

FACILITATOR'S NOTES

- The evaluation at the end of each meeting will provide the facilitator with a tool for gauging minor - or major - issues that may inhibit the progress of the meetings. Comments about temperature, food and room size should be recorded and monitored, especially if a number of participants are reporting the same thing.

- Keeping the evaluations anonymous may be important for some participants, especially in the earlier meetings.

- The evaluation form on the following page asks the participants to specifically report meeting highs and lows instead of having them rank preconceived factors. This qualitative model may allow the facilitator to readily identify consistent positives and negatives.

Common Assessment Meeting Evaluation

Date and time:

Here are three things that I liked about today's meeting:

1._____

2. ._____

3. ._____

Here are three things that I would like to see improved for subsequent meetings:

1. ._____

2. ._____

3. ._____

Additional Comments and Suggestions:

Working Meeting – Agency Assessment Presentation

FOCUS

The focus of the second meeting should be on two areas:

- Having a clear understanding of the project goals
- Beginning to learn about the different assessment tools used by different agencies.

DESIRED OUTCOMES

By the end of the meeting, the participants should have

- Reviewed the project goals and discussed issues/concerns that have arisen since the first meeting
- Presented and discussed individual agency assessment methods and resources.

Getting Ready

PARTICIPANT HOMEWORK

Participants should have prepared for this meeting by:

- Preparing a 10 to 15 minute presentation, highlighting the assessment processes used in their organizations (only one presentation/organization)

- Sending samples and/or presentation handouts to the facilitator to photocopy and distribute to other subcommittee participants (in advance of or during meeting)

FACILITATOR HOMEWORK

The facilitator should prepare for the meeting by:

- Sending out notes from the first meeting as soon after the meeting as possible so that participants can clarify their roles before beginning their homework (72 hours seemed reasonable for the SCLN group)

- Photocopying any relevant documents for new participants

- Photocopying and/or printing outlines, overheads for the presenters

- Arranging for overhead projector

- Confirming next meeting date, time, location and agenda with all members via e-mail at least one week in advance.

Additionally, the facilitator may need:

- Video or audio cassette recorder
- Flip chart paper and markers
- Lunch and refreshment

Agenda

Time: 3 to 4 hours

INTRODUCTIONS

- New members if any
- Today's agenda and outcomes

REVIEW

- Review of last meeting's notes
- Project goals as identified by committee in first meeting

AGENCY ASSESSMENT PRESENTATIONS

- Individual agency presentations

WRAP-UP AND EVALUATIONS

- Next steps
- Meeting evaluations

Introductions

FACILITATOR'S NOTES

- One of the key decisions the group will have to make is whether the meetings will be restricted to those participants in attendance at the first and/or second meeting.

- If new members arrive at the second meeting and are to be part of the project, then the facilitator should ensure that their reception is welcoming. If the participants know each other, this will not be a difficult or time consuming exercise. If, however, they have not worked together, the facilitator will have to devote some time at the beginning of the meeting to a second introduction exercise.

- Depending on the number of agencies represented and the number of presenters, the group may decide that one meeting will not be enough. If this is the case, then an additional meeting for the presentations may be required.

Review

FACIUTATOR'S NOTES

- One of the key goals for the second meeting is to ensure that everyone - including new participants - has a clear understanding of the project goals and directions. Given the amount of information that will have been covered during the first meeting, it is very likely that some of the participants will feel overwhelmed with the information. Therefore, using the notes from the previous meeting (as well as overheads or flip chart paper), the facilitator should spend between 15and 30 minutes reviewing the following topics and decisions:
    - Local project goals and objectives
    - Tentative action
    - Terms of reference
    - Provincial goals and expectations.

- As part of the review, the facilitator should also allow sufficient time for questions and answers. However, she/he should ensure that this does not become a venting session which could negatively affect the mood of the meeting and slow down the process.

Agency Assessment Presentations

FACILITATOR'S NOTES

The individual agency presentations are important for at least two reasons:

- First, they enable the entire group to begin to develop a better understanding of other agencies' assessment resources and tools.

- Second, they provide an opportunity for individuals to begin sharing their agencies' rationale for using different assessment tools in a relatively non-intimidating manner.

- For each presentation, representatives should be encouraged to restrict their presentations to 15 to 20 minutes (depending on the number of participants and the length of the meeting). Some of the key points each presenter may want to demonstrate in her/his presentation are:
    - *An overview of the assessment tools*
    - *The process that learners go through when they complete an assessment*
    - *The levels that the agency is serving through the use of the assessment tools.*

- Sufficient time should be allotted at the end of the presentation to allow other participants to ask questions. However, it will be important to ensure that each person sticks to the time limit or there may not be enough time to hear from everyone. For this reason, and depending on the number of agencies presenting, an additional meeting may be required.

Working Meetings – Establishing the Review Process

FOCUS

The focus of this meeting will be on structuring the assessment review process that the participants will use in their working subgroups.

OUTCOMES

The three major outcomes for this meeting will be to have participants:

- Confirm the composition of the working subgroups
- Understand the process of review to be applied to the different assessment tools
- Discuss and agree upon the skills that a learner must possess for the various Domain Levels.

Getting Ready

PARTICIPANT HOMEWORK

Participants should have prepared for this meeting by:

- Reviewing a list of evaluation criteria that can be applied to the assessment resources
- Collecting or recommending to the facilitator additional resources that may assist the subgroups in the development/refining of their own assessment criteria lists.

FACILITATOR HOMEWORK

The facilitator should prepare for this meeting by:

- Photocopying and/or distributing assessment criteria lists from this resource and/or others
- Collecting additional resources and references that may assist the subgroups develop or refine their own assessment criteria lists.

Agenda

Time: 3 to 4 hours

INTRODUCTIONS

- New members or substitutes if any
- Today's agenda and outcomes

FORMATION OF WORKING SUBGROUPS

- Deciding on form and composition

MODEL TO APPLYTO ASSESSMENT TOOLS

- Deductive review model

REVIEWING SKILLS CHECKLISTS AND CRITERIA LISTS

WRAP-UP AND EVALUATIONS

- Reporting back from subgroups
- Next Steps

Formation of Working Subgroups

FACILITATOR'S NOTES

The number and composition of the subgroups will depend upon at least four factors:

1. The first will be the project goals identified at the Planning Meeting. For example, if the project group as a whole determined that they were only going to try to come to a common understanding of Reading Levels 1-4, then the subgroups might be based around the four Levels. However, if the group determined, as did the SCLN project group, that they wanted to come to a common understanding of Communications Levels 1 to 5 and Numeracy 1 to 5, then the subgroups might then follow the two different Domains.

2. The second major factor will be the size of the group. The SCLN group was comprised of ten people. Consequently, four formed the Numeracy subgroup and six formed the Communications group. If the group was even larger, say 15, then the Communications group might have been further subdivided into Reading and Writing, thereby allowing five in each area.

3. The third factor to consider is individual area of expertise. If the project group does not have representation from the College sector for Numeracy or Communications, and other members of the group are not working with learners in Levels 4 and 5, then reviewing these two Levels may be ineffective.

4. And finally, time has to be considered. Depending on when the project has to be completed, the amount of time between meetings and the amount of individual time, the subgroups may choose to focus on a limited number of Levels.

Model to Apply the Assessment Tools

FACILITATOR'S NOTES

- By the beginning of this meeting, the project goals and objectives will have been established (in the Planning Meeting), and the participants will have become familiar with each other's agency initial assessment processes. The purpose of this meeting will be to help the participants form working subgroups so that they can begin a structured and consistent method for reviewing and discussing initial assessment tools and resources.

- Following the results of the SCLN project, the facilitation recommendations presented throughout this section are based on the assumption that a deductive model will be used for reviewing the various assessment tools and resources.

Deductive Review Model

- The deductive review model used by the Communications and Numeracy subgroups within SCLN and offered here is based on a five-step process.

  1. It begins with the subgroup participants agreeing on a list of skills that a learner at a particular Domain Level should have. For example, a Reading Level I skill might be *the learner can read common sight words.*

  2. Using the skills checklists as a base, the subgroups then work towards agreeing upon criteria that each assessment tool for a particular Level and Domain should have. (For example, a Reading Level I criterion might be that the content should be made up of very short, simple text.) Depending on how the participants decide to complete this step, each subgroup might first develop a list of criteria for each Level they are addressing and then move onto the next step. Or they might decide to develop a list of criteria for only one Level, proceed to the next step and then repeat the process for each subsequent Level. The facilitator should try to ensure that all of the subgroups are proceeding in the same manner.

  3. Once the criteria lists have been developed, samples of assessment tools and resources are collected for each Domain Level. These tools and resources should come from the individual agencies and from other identified sources, including those from the various Assessment Tool projects throughout the province.

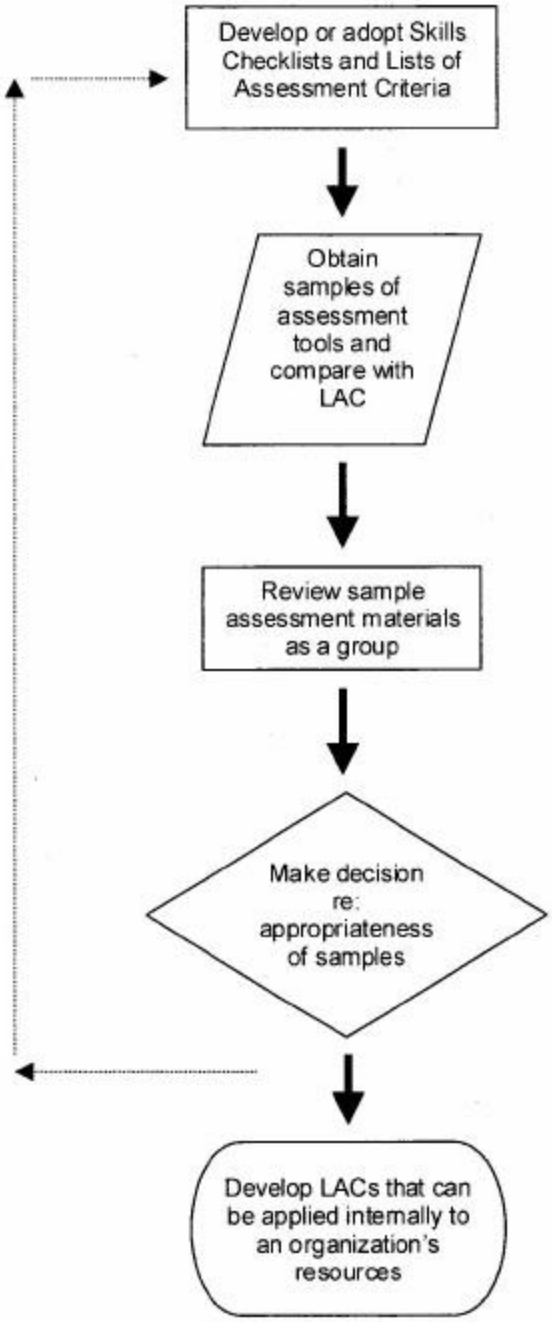
  4. The subgroups then review the different assessment tools as a group.

  5. Finally, the group makes a decision about whether the assessment tool corresponds to the criteria list.

- Although this model appears entirely scientific, in reality, changes to the skills checklists and the criteria lists will likely occur throughout the process. Therefore, a sixth step could also be added:

    6. At the end of reviewing all of the collected assessment tools and resources for a particular Domain Level, the subgroup would develop a revised criteria list that could then be used by an organization to apply internally to its assessment tools and resources.

Deductive Review Model



Reviewing Skills Checklists and Lists of Criteria

FACILITATOR'S NOTES

- One of the challenges associated with this facilitation model is that it is based on two assumptions:
  1. First, it is assumed that all participants within each subgroup agree or can agree with the skills presented/developed in the skills checklist.

  2. Second, they must then be able to agree on the list of criteria that stems from the skills checklist.

- Therefore, if this model is to be used, it is important for the facilitator to allow sufficient time for each subgroup to review, discuss and modify the skills checklist and/or the list of criteria.

- Even if the subgroups use the criteria lists included in this resource, the facilitator should allow a minimum one hour review time for each list.

The SCLN Story

- The SCLN subgroups - Communications(Reading and Writing) and Numeracy - were working towards the same goal of developing a resource that agencies could use to determine whether their initial assessments were measuring what they were purporting, based on the Learning Outcomes Matrix. However, because of prior work done by two members, the Communications subgroup began with skills checklists already developed. The Communications subgroup then proceeded from steps two through six.

- The Numeracy subgroup did not have skills checklists for the five Levels in advance. Therefore, their meeting and homework time was devoted to developing the initial checklists, which they then used to develop sample assessment tasks.

Wrap Up and Evaluations

FACILITATOR'S NOTES

Reporting Back

- As part of the wrap-up, the subgroups should report back to the plenary group about their progress. If the facilitator finds that one of the subgroups has decided to proceed by developing and applying one list of criteria at a time, while another group has decided to address all of the lists of criteria at once, she/he should encourage the participants to decide on one format that all subgroups will use.

- The facilitator may find that there is confusion about the process that the subgroups will be employing. For this reason, she/he may want to allow ample time at the end of the meeting for people to ask questions and to clarify, if necessary, how the subgroups will be working towards meeting the project goals.

- The facilitator may also want to invite participants to call or e-mail any questions they might have, in the event there are participants who feel uncomfortable asking these questions in front of the group.

Next Steps

- The facilitator should identify what additional resources the subgroups will need for the next meeting and determine who will be responsible for getting them.

Evaluations

- The evaluation forms may also provide a good indication as to the level of understanding that took place during this particular meeting.

Working Meeting - Assessment Reviews

FOCUS

- The focus of this meeting should be on beginning the subgroup work to review and discuss assessment tools according to the different Levels and Domains.

OUTCOMES

By the end of this meeting, the participants should have:

- Confirmed the discussion/review process to be applied to the different assessment tools

- Begun reviewing assessment tools and resources in their respective subgroups.

Getting Ready

PARTICIPANT HOMEWORK

Participants should have prepared for this meeting by:

- Bringing samples of assessment forms and resources they have collected
- Sending samples to the facilitator to photocopy and distribute to other sub-committee participants (in advance of or during meeting)
- Based on the results from the SCLN meetings, participants will probably need a minimum of three weeks to adequately collect and organize their materials
- If one or more of the subgroups is reviewing Writing assessment materials, those participants may want to bring student writing samples (with names removed) to accompany the assessment forms.

Getting Ready

FACILITATOR HOMEWORK

The facilitator should prepare for this meeting by:

- Photocopying any relevant documents for new or substitute participants
- Obtaining relevant resource materials for the subgroups (at their request)
- Distributing notes from the previous meeting
- Confirming meeting date, time, location and meeting agenda with all members via e-mail.

Agenda

Time: 3 to 4 hours

REVIEW

- Notes from previous meeting

ASSESSMENT REVIEW DISCUSSIONS

- Small group discussion format
- Participant roles
- Agreeing to disagree
- Recording of progress

REPORTING BACK

- What to report back

WRAP-UP AND EVALUATIONS

- Next steps

ASSESSMENT REVIEW DISCUSSIONS

FACILITATOR'S NOTES
Small Group Discussion Format

- Once the sub-groups have been identified, it is important that each group have a similar method of operation. This will help expedite the overall process and assist with reporting back at the end of each meeting as well as at the end of the project.

- The facilitator may want to suggest that each subgroup participant have an opportunity to present her/his assessment pieces for the appropriate Domain and Level(s). As part of the presentation, she/he would adhere to the following:

  - An overview of the materials
  - Rationale for inclusion of the materials (i.e. why the person believes the materials are appropriate).

- The working groups should be advised to budget their time so that each representative has an opportunity to present her/his materials. Approximately 20 to 30 minutes per person should be allotted.

Participant roles

- To ensure that the sub-group work is as effective and efficient as possible, the facilitator may instruct the groups to assign roles to some or all of the members, including
  - Time keeper
  - Recorder
  - Reporter
  - Reference person (to refer to Learning Outcomes Matrix or other relevant documents to answer specific group inquiries)
  - Referee.

Agreeing to disagree

- Given that agreement will probably not occur on all aspects, the referee or time keeper should be instructed to allow discussion/debate for no more than five minutes on any issue before recording that issue and moving on. At the end, the reporter or recorder can present a list of points where there was agreement and a list where there was not. Depending on the amount of time left at the end of the group session, the points where agreement was not achieved could be further discussed.

Recording of Progress

- The sample sheet on the next page could be photocopied by the facilitator in advance and offered to the recorder of each group to help her/him with note-taking and reporting.

Assessment Tools Review Form

Organization	Presenter	Level	Domain

Overview of Assessment Tool(s):
Agreement was reached in the following areas:
Agreement was not reached in the following areas:
What we need to do next to reach agreement:

Reporting Back

FACILITATOR'S NOTES

- Using the notes from the Agency Assessment Review Form, each group reporter can report back to the larger group the results from the discussions.

- It will be important to allow sufficient time - approximately 5 to 10 minutes - for each reporter to update the larger group. Sufficient time should also be budgeted to allow plenary group participants to ask questions.

- If possible, the facilitator should obtain a copy of the reporter's form (at the end of the meeting or by fax) so that she/he can build the information into her/his meeting notes.

Working Meetings - Applying Lists of Assessment Criteria

FOCUS

- Following the initial Assessment Review Meeting (previous meeting), participants should continue to focus on developing an understanding of the outcomes in each level and their application to the initial assessment process.

- Depending on the specific project goals and the subgroup composition, the participants may decide to proceed by addressing one level per meeting.

OUTCOMES

By the end of the second last meeting, participants should have:

- Reviewed and discussed a variety of initial assessment tools and materials vis-a-vis the lists of criteria developed by the different subgroups

- Identified any assessment tools where consensus could not be achieved and sought outside assistance to resolve the dispute

- Shared the progress of each working subgroup with the plenary group

- An agreed upon list of criteria for each Domain Level that can be applied to additional initial assessment tools and materials.

Getting Ready

PARTICIPANT HOMEWORK

In preparation for each meeting, participants should:

- Continue to bring samples of assessment forms and resources according to the levels being examined
- Provide additional samples of students' work to accompany sample assessment forms (for the Writing subgroup)
- Send materials to the facilitator to photocopy and distribute to other sub-committee participants (in advance of or during meeting)
- Based on the amount of preparation and homework time required, a minimum of three weeks should continue to be allotted between meetings. The SCLN group found that four weeks was a sufficient amount of time for preparation and review. Four weeks also enabled the facilitator sufficient time to copy and/or electronically distribute resources.

FACILITATOR HOMEWORK

- The facilitator's preparation for each of the Assessment Review Meetings will be similar to that outlined in the first Assessment Review Meeting.

Agenda

Time: 3 to 4 hours

REVIEW

- Notes from previous meeting

ASSESSMENT REVIEW DISCUSSIONS

- Ongoing subgroup work
- Developing lists of criteria

REPORTING BACK WRAP UP AND NEXT STEPS

N.B. The agenda outlined in the previous meeting can be reapplied to the subsequent meetings.

Assessment Review Discussions

FACILITATOR'S NOTES

It will be important to ensure that the meetings do not get too monotonous and/or overwhelming. Some of the signs to watch out for include:

- Participants coming unprepared to meetings
- Lasting tension within the groups through discussions
- Expressions of concern about the amount of paper (overwhelmed with information).

Several methods to help alleviate tedium include:

- Changing lunch and or refreshments (a small thing that goes a long way)
- Changing location of meetings (provided the new location is a better facility)
- Revisiting original goals and celebrating incremental progressions
- Using humour at the beginning of the meeting and after breaks (overheads of cartoons, trivia, etc.)
- Reestablishing an open line of communication between individual participants and facilitator
- Scrutinizing meeting evaluation forms for signs of individual and group distress.

Developing the Lists of Assessment Criteria

- If the group has determined that lists of assessment criteria will be a product of the project, then the facilitator should ensure that the subgroups are using a similar template for overall consistency.

- Additionally, the facilitator may find that one subgroup is progressing faster or slower than the others. If this is the case, the facilitator may want to present several options to the group:

1. First, she/he can refer the group back to the original project outcomes and see if they are still realistic. If not, the group may want to pare them back to ensure project success and to avoid participant burnout. (For example, if the group initially indicated that they wanted to develop assessment checklists for all five levels in Numeracy, Reading and Writing, but that one of the subgroups was having difficulty, the group may decide that they would only develop checklists for the first four levels).

2. Additionally, the facilitator may suggest rescheduling one or more of the meetings to allow more time for the groups to complete their homework.

3. And finally, the facilitator should find out from the subgroup participants if they require additional resources (human or otherwise) to help them complete their checklists.

Reporting Back

FACILITATOR'S NOTES

- The format established in the first Assessment Review Meeting for the reporting back of each subgroup's progress can be reapplied to each of the subsequent Review Meetings.

- The facilitator may want to have copies of the Assessment Tools Review Form available for each meeting to help the subgroup reporters report back to the plenary group.

- The facilitator may want to record the main findings from each subgroup on flip chart paper to assist the group discussions.

Working Meeting(S) - Finalizing And Presenting The Checklists

FOCUS

- The last meeting(s) of the project should be devoted to finalizing and presenting the lists of assessment criteria, reviewing the success of the project and identifying post-project actions.

OUTCOMES

By the end of the last meeting, participants should have:

- Completed the list of assessment criteria for their subgroups and have copies of the lists of criteria from the other subgroups

- Presented the overall results of each subgroup to the plenary group and invitees

- Discussed and evaluated the success of the project according to the original project goals

- Identified and discussed post-project plans to help ensure the ongoing success of the project.

Getting Ready

PARTICIPANT HOMEWORK

In preparation for the final meeting(s), participants should:

- Within the working subgroups, complete final versions of the lists of assessment criteria
- Develop short presentations for the plenary group (and other invitees) on the process and results of the work completed by the subgroups
- Consider the success of the project by referring back to the original project goals and expected outcomes
- Identify possible future actions to help secure the ongoing success of the project.

FACILITATOR HOMEWORK

The facilitator should prepare for this meeting by:

- Ensuring that she/he has received copies of each subgroup's lists of assessment criteria and arrange for distribution to all participants and invitees if applicable
- Arranging for overhead projector for subgroup presentations
- Proposing an agenda for the presenters to ensure that each subgroup budgets their time accordingly
- Preparing for a discussion about future actions
- Ensuring that all invitees know of location, date and time of presentations.
- Additionally, she/he should also develop an evaluation form that enables participants to objectively and subjectively measure the success of the project.

Agenda

Time: 3 to 5 hours

INTRODUCTIONS

- If invitees are present
- Outline for the day

PROJECT EVALUATION

- Evaluation forms and discussion

SUBGROUP PRESENTATIONS

- Review of the methodology employed
- Discussion of challenges
- Results of the subgroup work
- Distribution of assessment checklists

FUTURE ACTIONS

- Possible next steps
- Who else to be involved

WRAP-UP

SUBGROUP PRESENTATIONS

FACILITATOR'S NOTES

During the presentations, the facilitator's role will likely be threefold:

1. To assist the presenters with the set up, including arranging for the overhead projector, and distributing copies of the lists of criteria to participants and invitees.

2. To introduce the presenters and provide background information about the project to invitees if necessary.

3. To monitor the time and facilitate the transition from one presenter to the next.

• Depending on the number of presentations and the number of invitees, more than one meeting may be required. The SCLN group, upon completing the project work, scheduled three presentation meetings: one for each of the subgroups.

Project Evaluations

FACIUTATOR'S NOTES

- Prior to the formal group presentations, the facilitator may want to initiate a discussion around the project evaluation. If additional people are to be invited, then the working group may want to meet at least one hour in advance of the presentations and the arrival of the invitees.

- The purpose of the evaluation will be to determine whether the participants feel the project has been a success. By referring back to the specific objectives that were identified in the first meeting (and possibly modified during the progress of the project), the facilitator and participants can measure just how successful the project has been.

- By measuring the participants' perception of the *degree* of success, the facilitator will also have valuable information to pass on to the Network about areas for future development in Common Assessment.

- And finally, the project evaluation will provide quantifiable information that the Network can use as part of their funder accountability.

Sample Project Evaluation Form

1. In your opinion, were the following project objectives successfully met?

Goal	Objective	Met Y/N	Comments
1.	**1.**		
	2.		
	3.		
2.	**1.**		
	2.		
	3.		
3.	**1.**		
	2.		
	3.		

2. Overall, how successful do you think the project has been in improving Common Understanding of Assessment in your region?

Not at all Successful Somewhat successful Successful Very successful

3. In your opinion, what were the three most important outcomes of this project?

1. _____

2. _____

3. _____

4. In your opinion, what were the three most significant challenges the group faced in the project?

1. _____

2. _____

3. _____

5. If you were to counsel another group on repeating the same project in their region, what three important recommendations would you pass along to them?

1._____

_____

2 ._____

_____

3._____

_____

Future Actions

FACILITATOR'S NOTES

- A discussion addressing future actions is an important way of sustaining the enthusiasm and commitment from the project. It also provides an opportunity to highlight gaps that may still exist and how those gaps can be bridged. For example, perhaps the group has identified that they would like to develop lists of criteria for one or more Levels that they could not address during the length of the project.

- The Sample Action Plan Template (on page 14) could be used to help the group identify what short-term actions need be taken to address the additional needs.

A Common Understanding of Assessment

Sample Skills checklists and Lists of Assessment Criteria

Note: The following Skills Checklists for Communications and Numeracy, and the Lists of Assessment Criteria for Communications are offered as samples only.

And while another region may find these suit their needs without modification, project participants are encouraged to use them as a *base,* from which they can develop their own Skills Checklists and Lists of Assessment Criteria.

Skills Checklist – Level 1 Numeracy

Skill Set	Skill Ability
Read & Write Numbers	✓ reads mathematical signs +, - ✓ reads & writes number words up to 10 ✓ reads & writes numbers up to 100
Count	✓ counts by 2's, 5's, 10's to 100 ✓ uses ordinal numbers to 10th
Add & Subtract	✓ Add & Subtracts 1 digit numbers mentally and on paper ✓ Solves real-life problems using addition and subtraction may be explained
Place Values	✓ Models numbers grouped in 1's & 10's up to 100 (i.e. grouping physical objects in groups of 1's & 1O's to represent a number) ✓ Uses zero as a place holder
Use of Fractions, Decimals, Ratios and Percentages	✓ represents & explains halves as a part of a whole using concrete materials & drawings
Calculate Money	✓ states the value of coins and bills up to $99.99
Linear Measurement • **Time** • **Temperature** • **Volume & Mass**	✓ uses mathematical language to describe dimensions (e.g. height, length, width) ✓ reads an analog clock to the hour and % hour ✓ relates temperature to daily activities – pictorial ✓ estimates capacities and masses of common objects (e.g.a litre of milk)
Managing Data Probability	✓ reads graphs made with concrete materials (e.g.pictographs)
Two Dimensional Geometry	✓ recognizes & identifies circles, squares, rectangles & triangles

Skills Checklist – Level 2 Numeracy

Skill Set	Skill Ability
Read & Write Numbers	✓ reads mathematical signs +, -, x ✓ reads & writes number words up to 100 ✓ reads & writes numbers up to 1,000
Count	✓ Recognizes and counts numbers 1,000 ✓ Counts by 25's ✓ Uses ordinal numbers to 100th
Add & Subtract	✓ Adds 3 digit numbers with carrying ✓ Subtracts 3 digit numbers with borrowing ✓ Determines value of missing term in addition and subtraction sentence (4 + _ = 13), (7 - _ = 5) ✓ Mentally adds/subtracts one and two digit numbers ✓ Solves real-life problems
Place Values	✓ Understands place values up to 1,000
Multiply and Divide	✓ Multiplies by 1 digit ✓ Mentally recalls multiplication tables to 10 x 10 ✓ Divides a 2 digit number by a 1 digit number
Use of Fractions, Decimals, Ratios and Percentages	✓ Can distinguish whole numbers from fractions ✓ Uses terms for common fractions (%, ~) ✓ Explains common percentages (25% = %, 50% = ~, 100% = 1 whole)
Calculate Money	✓ Adds and subtracts money to $999.99
Linear Measurement • **Linear** • **Time** • **Temperature**	✓ Begins to understand metric units ✓ Estimates, measures and records (to the nearest whole #) ✓ Expresses time in minutes per half-hour and hour, hours per day, days per week, month, year/weeks and months per year ✓ Understands temperature (Celsius, Fahrenheit) and temperature changes
Grids and Coordinate Geometry **Transformation Geometry**	✓ Describes how to get from one point to another on a grid (2 spaces across, one down) ✓ Recognizes and identifies the difference between 2/3D figures and forms; e.g. square/cube, circle/spheres, triangles/pyramids ✓ Begins to understand geometric terms ✓ Begins to understand the concepts of simple transformations e.g. reflections
Managing Data Probability	✓ Predicts the probability that an event will occur (a weather forecast chance of rain) ✓ Interprets data from graphs (e.g. circle graphs)

Skills Checklist – Level 3 Numeracy

Skill Set	Skill Ability
Read & Write Numbers	✓ writes numbers to 100,000 ✓ reads & writes whole numbers in standard and expanded forms
Count	✓ Recognizes and counts numbers 100,000
Add & Subtract Multiply and Divide	✓ Adds & subtracts more than three digit whole numbers and decimals up to hundredths place value ✓ perform simple mental additions and subtractions ✓ demonstrates proficiency of all multiplication/division functions of whole numbers with and without a calculator ✓ solves real-life problems
Place Values	✓ Understands place values from 0.01 to 100,000
Use of Fractions, Decimals, Ratios and Percentages	✓ can place fractions in order of size ✓ begins to understand concept of proper & improper fractions ✓ can determine a common denominator ✓ begins to relate fractions to decimals ✓ uses percentages ✓ relates decimals to percentages (e.g .. 5=50% .25=25%, etc.)
Calculate Money	✓ recognizes all forms of money up $99,999.99 coins and bills ✓ reads & writes money values to $99,999.99 ✓ begins to understand debits & credits (integers) ✓ understands when a bank account is in overdraft ✓ attempts to balance a cheque book
Linear Measurement • **Linear** • **Time** • **Capacity, Volume & Mass**	✓ recognizes the difference between millimetres, centimetres, metres, kilometres to measure distance and dimensions and applies skills and converts from imperial measurement ✓ estimates time intervals to the nearest second ✓ reads an analog, digital & a 24-hour clock ✓ can estimate the time of arrival based on distance travelled ✓ understands and demonstrates standard measurements of, containers ✓ begins to relate a millilitre, litre and milligram, gram, and kilogram.
Perimeter & Area	✓ uses grid paper to calculate areas & perimeters of polygons and irregular 2 dimensional shapes ✓ uses formulas and rules for calculating perimeters and areas

Skill Set	Skill Ability
Two & Three Dimensional Geometry	✓ recognizes the difference between two and three dimensional figures ✓ classifies 2D shapes according to angles and side properties e.g. obtuse, scalene ✓ is introduced to two and three dimensional figures using graph paper & nets ✓ identifies shapes such as quadrilaterals, pentagon, hexagon & octagon ✓ begins to understand congruency
Geometry **Transformation Geometry**	✓ begins to understand the use of a Cartesian plane ✓ begins to understand simple transformations e.g. translations, reflections & rotations
Managing Data **Charts & Graphs** **Probability**	✓ can gather simply data for information and draw a reasonable conclusion based on the information ✓ understands and explains the use of data in everyday life ✓ relates information to personal issues ✓ can determine the mean and mode of a set of data ✓ recognizes the value and limitations of a chart or graph ✓ can determine information from a simply chart or graph ✓ begins to analyze simple probability experiments using tree diagrams, etc. ✓ predicts probability in simple experiments and real-life situations, e.g. weather, games, etc.
Patterning & Algebra	✓ begins to work with patterns and number sequences ✓ begins to work with equations

Skills Checklist – Level 4 Numeracy

Skill Set	Skill Ability
Read & Write Numbers	✓ Reads & writes numbers from .001 to 1,000,000
Count	✓ recognizes & counts numbers 1,000,000
Add & Subtract **Multiply and Divide**	✓ applies the order of operations in simple equations using decimals and whole numbers (BEDMAS) ✓ multiplies and divides at least four digits by two digits ✓ demonstrates proficiency with exponents and square roots
Place Values	✓ understands place values from 0.001 to 1,000,000
Use of Fractions, Decimals, Ratios and Percentages	✓ demonstrates proficiency of all basic operations with decimals and fractions with and without a calculator ✓ converts between fractions, decimals and percentages ✓ understands percent and ratios as used in everyday situations (e.g. 30% off, maps) ✓ solves simple real-life problems involving fractions, percent and ratios (e.g. adjusting a recipe, calculating PST & GST taxes)
Calculate Money	✓ reads and writes money to $1,000,000
Measurement	✓ understands imperial and metric systems for measurement of length, mass (weight), volume & temperature ./ converts basic metric/imperial systems and solves simple real-life problems involving metric and imperials measurements
Perimeter & Area	✓ finds the area and perimeter of a rectangle, square, triangle & irregular shapes and solves realistic problems (e.g. determines the amount of fencing required for a yard)
Geometry • **Two-and Three-dimensional Geometry** • **Transformational Geometry**	✓ understands congruency of two geometric figures ✓ identifies two dimensional shapes that meet certain criteria (e.g. an isosceles triangle with a 40° angle) ✓ estimates the size of angles within a reasonable range ✓ locates and plots coordinate points in the first quadrant of a Cartesian plane ✓ extended use of nets to design 3D Objects ✓ extends work with reflections, translations & rotations of a figure in the plane begins to use a protractor

Skill Set	Skill Ability
Managing Data	✓ demonstrates a proficiency in reading and interpreting data presented on tables, charts and graphs and can discuss the important features . ✓ Can conduct, record & analyze a brief survey ✓ Begins to work with spreadsheets
Patterning & Algebra	✓ makes predictions related to patterning and number sequences ✓ solves simple algebraic equations using whole numbers (e.g. solve for c when a =2 and b=3: a + b=c)

Skills Checklist – Level 5 Numeracy

Skill Set	Skill Ability
Perform Basic Number Operation	✓ Compares and orders rational numbers in any form ✓ Understands expanded form of whole numbers ✓ Adds/subtracts/multiplies/divides rational numbers in any form and applies these operations to practical problems using correct order of operations where necessary ✓ Understands scientific notation when working with approximate numbers ✓ Has full understanding of squares/square roots: -estimates square roots of whole numbers: e.g. square root of 15 lies between 3 and 4 but closer to 4 therefore approximately 3.9. -uses iteration to estimate square root of non-perfect squares ✓ Understands the meaning of powers with rational exponents: (natural, 0, negative) ✓ Correctly applies the power laws in calculations ✓ Understands the use of power key on calculator
Use· Measurement for Various Purposes	✓ Has a full understanding of when to estimate and when to calculate using formulae with appropriate units: -perimeter, area of standard plane figures; triangles, rectangles, squares, circles (using II) -surface area, volume of prisms, cones, pyramids ✓ Understands how to determine perimeters, areas, volumes of irregular shapes objects
Geometry • **2D**	✓ Understands properties of basic geometric figures: triangles, quadrilaterals (parallelograms, rectangles, squares, trapezoids), circles ✓ Understands angle relations for intersecting lines, parallel lines, transversals, triangles ✓ Understands and applies Pythagorean Theorem
• **3D**	✓ Is familiar with standard 3D forms: prisms, cylinders, cones, pyramids ✓ Understands the use of nets to sketch, build 3D object
• **Cartesian**	✓ Understands the Cartesian plane and uses it: ✓ -to plot points, lines, tables of values ✓ -to draw similar figures with a given scale factor ✓ -to plot transformations using algebraic rules (see transformational geometry below)
• **Transformational**	✓ Understands isometrics: translations, reflections, rotations, slide rotations on the plane and uses them to discuss congruency ✓ Can relate each of these transformations to an algebraic formula to use on Cartesian plane

Skill Set	Skill Ability
Managing Data Probability	✓ Understands how to design and carry a survey to investigate a given topic, differentiating between sample and census
Collecting, Organizing	✓ Presents data effectively ✓ Uses databases and spreadsheets effectively ✓ Draws line graphs, histograms, circle graphs with and without computer
Concluding/ Reporting	✓ Makes judgments based on data analysis ✓ Understands concept of best measure of central tendency and how to use it effectively to draw conclusions
Analyzing	✓ Is aware that statistics can distort reporting of information: -poor sampling -manipulation of graphs -biased misuse of data ✓ Uses graphs to predict trends, extract quantitative information, draw conclusions and report information
Probability	✓ Understands basics of probability of events ✓ Uses more complex definitions of probability with tree diagrams and lists ✓ Applies probability to game theory
Patterning and Algebra	✓ Understands patterns and sequences of numbers and is able to *identify/ extend/ create/ analyze/ generalize* ✓ Writes algebraic expressions for general term of a sequence of numbers
Sequences/ Series	✓ Understands basic algebra involving variables, terms, expressions, distribution over brackets
Symbolic Algebra	✓ Evaluates simple expressions by substituting rational numbers ✓ Understands the math and solution of equations and inequations in one variable ✓ Applies knowledge of equations and inequations to solution of problems and real life activities

Skills Checklist Level 1 Reading

Outcome: Reads with understanding for various purposes

Skills	Can do this	Needs some help	Comments
Decoding unfamiliar words			
1. Pronounces sounds of letters and letter combinations a. consonants b. short vowels c. long vowels d. vowel combinations e. digraphs/blends			
2. Decodes unfamiliar words using a variety of strategies a. Blending b. Context c. Sentence structure d. Pictures			
3. Recognizes that names begin with capital letters			
Types of texts (recipes, menus, schedules. etc.):			
4. Recognizes type of text			
5. Describes how type of text is organized			
6. Locates information using: a. alphabetical order b. headings c. titles			
Comprehension			
7. Retells story accurately in sequence			
8. Finds information accurately (rereads if necessary)			
9. Reads symbols			
10. Reads common sight words (in sequence or not)			
11. Follows pictorial instructions			
12. Shows an understanding of periods, commas & question marks when reading			
13. Uses experience to understand what is read			

Skills	Can do this	Needs some help	Comments
Interpretation			
14. Expresses thoughts and feelings about stories and events			
15. Predicts what may happen next			

Skills Checklist Level 2 Reading

Outcome: Reads with understanding for various purposes

Skills	Can do this	Needs some help	Comments
Decoding unfamiliar words			
1. Decodes unfamiliar words using a variety of strategies: a. Phonics b. Word parts (syllables, root words, suffixes, prefixes) c. Context d. Sentence structure e. Dictionary			
Types of texts (recipes, menus, schedules. etc.):			
2. Distinguishes between fiction and nonfiction			
3. Identifies different forms of writing (e.g. poems, short stories, biography, etc.)			
4. Locates information using: a. format of text b. table of contents c. charts d. headings and subheadings e. diagrams f. maps g. index h. other resources (e.g. organizations/ individuals)			
5. Reads common abbreviations			
6. Shows an understanding of common punctuation when reading			
7. Asks questions			
8. Predicts what may happen next			
Interpretation			
9. Begins to develop own opinions			
10. Begins to make inferences			
11. Distinguishes between fact and opinion			

Skills	Can do this	Needs some help	Comments
Comprehension			
12. Follows written instructions			
13. Identifies main idea in a piece of writing			
14. Describes: a. the plot b. characters c. setting			
15. Restates information			
16. Uses a large sight word vocabulary			

Skills Checklist Level 3 Reading

Outcome: Reads with understanding for various purposes

Skills	Can do this	Needs some help	Comments
Type of text (e.g. essays, reference materials, novels)			
1. Selects appropriate materials for specific purpose			
2. Skims and scans to locate specific information			
3. Uses a dictionary or glossary to determine the meaning of specialized terms			
4. Finds information using simple graphs and tables			
5. Understands format for different types of writing, e.g.: letters, reports			
Decoding unfamiliar words			
6. Decodes unfamiliar words using a variety of strategies			
Comprehension			
7. Follows written instructions			
8. Identifies main idea in a piece of writing			
9. Outlines the main events of the plot. Describes the role of the characters and the setting			
10. Compares information from various sources			
11. Asks self questions			
12. Records key points			
13. Edits research material			
Interpretation			
14. Makes predictions based on evidence			

Skills	Can do this	Needs some help	Comments
15. Makes judgements/ draws conclusions using evidence Begins to identify the writer's or character's point of view			
16. Develops own opinion by reading a variety of materials			
17. Recognizes how own attitude influences interpretation			

List of Assessment Criteria
Reading -- Level 1

Criterion	Details
Content	• very short, simple tests • familiar topics • concrete ideas • may have pictures • list of sentences and/or common sight words
Form	• large print • good spacing • may have pictures • instructions up to 6 steps long, 1 instruction per step
Length	• always remembering that content is a prime factor, and this section should not be used as a prime factor in determining levels, most reading passages at the level should contain: • one paragraph • 100 words or less • average length of sentences 6, no more than 10
Sentence Structure	• simple punctuation only (i.e. periods, commas, question marks) • simple sentences (one idea per sentence) • repetitive patterns • sentences follow natural order (subject, verb, object)
Vocabulary	• familiar words • 1-2 syllable words • repetition of words
Types of Text	• page of individual letters • short article or simple stories • simple schedules • charts, calendar • menus • letters, notes or memos • advertisements • symbols and signs • picture dictionary • recipes • maps • poems • comics • captions under pictures • simple table of contents

List of Assessment Criteria
Reading -- Level 2

Criterion	Details
Details	• concrete ideas and some inferential meaning • familiar, everyday content of personal or general relevance
Form	• may have illustrations or diagrams • text is clear, easy to read print or handwriting • well spaced • instructions up to 10 steps long. May be more than 1 instruction per step
Length	• always remembering that content is a prime factor, and this section should not be used as a prime factor in determining levels, more reading passages at this level should contain: • one page short paragraphs, minimum 2-3 • 300 words or less
Sentence Structure	• more advanced punctuation - apostrophe, quotation marks, exclamation marks • compound sentences using linking words • some complex sentences • sentence length generally 10-12, no more than 20 • sentences follow natural order (subject, verb, object) • descriptive phrases and clauses
Vocabulary	• multi-syllable words, (mainly 2 with some 3 syllables) • may contain proper names, other than familiar first names • mainly concrete, with some abstract but common words
Types of Text	• fiction (poems, short stories, novels) • non-fiction, articles • charts and graphs • simple maps • directories • menus • recipes • letters, memos • dictionaries • encyclopaedias • advertisements • table of contents • index • phone book

List of Assessment Criteria
Reading -- Level 3

Criterion	Details
Content	• opinion • cause and effect • may be beyond personal experience • combination of concrete and inferential meaning • abstract ideas
Form	• type is of normal size • prose may contain inserts • graphs and tables contain more than one category of information • non-fiction prose may contain headings, subheadings, tables, graphs, etc. • instructions more than 10 steps long and may have more than 1 step per sentence

Length	• always remembering that content is a prime factor, and this section should not be used as a prime factor in determining levels, most reading passages at this level should contain:
	  • a minimum of four (4) paragraphs
	  • each paragraph should have a minimum of 5-6 sentences
	  • reading should be a minimum of 2 pages in length
	  • novels should be a minimum of 50 pages

Sentence Structure	• more detailed punctuation and grammar
	• longer sentences with introductory clauses (e.g.
	  • ***1***. *After reading pages* 1-2, *answer the following questions in complete sentences.*
	  • ***2***. *If we are going to make progress, we had better get started now!*
	  (Generally more than 12 words per sentence)
	• use of multiple verb tenses
	• variety of sentence types
	• passage may contain quotation marks for titles of articles, commas, apostrophes, exclamation marks, and the colon in salutation, time and lists

Vocabulary	• words are sometimes unfamiliar (including proper names) • multi-syllable words (3-5) • may have some figurative language

Criterion	Details
Types of Text	• informational texts • articles • editorials • short essays and novels • magazines • graphs and tables • directories • CD-ROM disks • newspapers • books • internet • reference material assignment directives (instructions) • maps • Poems • Letters, memos • Recipes/instructions • schedules

Skills Checklist - - Level 1 Writing

Outcome: Write clearly to express ideas

Skills	Can do this	Needs some help	Comments
Writes for various purposes			
1. Prints the alphabet in small letters and capital letters			
2. Writes and signs own first and last name			
3. Writes own address			
4. Writes number symbols (1-10) • Writes number words (1-10)			
5. Copies accurately from printed material			
6. Dictates an experience story			
7. Expresses an idea in a sentence			
Visual Presentation			
8. Prints legibly			
9. Leaves space between words			
Grammar and Punctuation			
10. Can write a simple complete sentence			
11. Forms plurals of 1- syllable words			
12. Uses periods at the end of sentences			
13. Uses comma after the salutation (note)			
Spelling			
14. Spells unfamiliar words phonetically			
15. Uses capitals: • at beginning of sentences • for familiar proper names • for 1st person singular (I)			
Building Vocabulary			
16. Uses instructor-presented words in sentences			

Skills Checklist - - Level 2 Writing

Outcome: Write clearly to express ideas

Skills	Can do this	Needs some help	Comments
Expresses ideas when writing for various purposes			
1. Completes forms with detailed personal information			
2. Writes answers to questions in sentence form			
3. Brainstorms ideas for writing			
4. Organizes thoughts in a short simple paragraph			
5. Rewrites corrected material			
Visual presentation			
6. Uses titles, underlining & letter size for emphasis			
7. Uses correct format to suit purpose			
8. Uses appropriate margins and spacing			
9. Uses visual material to convey message			
10. Begins to use cursive writing			
Grammar and Punctuation			
11. Generally uses complete sentences			
12. Identifies nouns and verbs			
13. Uses correct subject-verb agreement • Uses adjectives and adverbs correctly • Uses the negative correctly			
14. Forms irregular plurals			
15. Uses a variety of sentence types (questions, etc.)			
16. Uses connecting words to link simple sentences			
17. Uses end punctuation correctly (**.**, **?**, **!**) • Uses a comma to separate items in lists, addresses and dates • Uses an apostrophe in common contractions and to show possession			

Skills	Can do this	Needs some help	Comments
18. Spells irregular words phonetically			
19. Uses spelling rules to add endings (-ing, -ed, -es)			
20. Divides words into syllables			
21. Uses capitals for all proper nouns			
22. Uses common abbreviations correctly			
23. Uses resources to check spelling (dictionary, computer)			
Building Vocabulary			
24. Builds new words by adding common prefixes and suffixes to root words			
25. Uses compound words			
26. Uses new words from reading in sentences			
27. Learns words relevant to personal goals and uses them in sentences			
28. Chooses appropriate words for purpose and to convey feelings			
29. Uses a dictionary and thesaurus to expand vocabulary			

Skills Checklist - - Level 3 Writing

Outcome: Write clearly to express ideas

Skills	Can do this	Needs some help	Comments
Expresses ideas when writing for various purposes			
1. Expresses an opinion in writing			
2. Organizes information into well developed paragraphs			
3. Conveys a main idea and gives relevant supporting details			
4. Provides factual information accurately and completely			
5. Revises work, seeking feedback from others			
6. Proofreads and corrects final drafts			
7. Completes various forms that require paragraph answers (e.g. accident reports, insurance claims and more comprehensive application forms)			
Visual Presentation			
8. Uses proper paragraph indentation, spacing and margins			
9. Uses legible cursive writing			
10. Labels pictures and diagrams appropriately			
11. Uses graphs, charts and captions			
Grammar and Punctuation ...			
12. Uses correct noun-pronoun agreement • Uses verb tenses correctly			
13. Uses phrases to clarify meaning			
14. Uses simple and compound sentences • Varies sentence structure			
15. Uses connecting words to link sentences in a paragraph			
16. Uses comma for a variety of purposes to clarify meaning • Uses quotation marks for dialogue • Uses end punctuation correctly			

Skills	Can do this	Needs some help	Comments
Spelling			
17. Uses phonics, spelling rules, knowledge of word structure and meaning to spell with accuracy			
18. Uses a hyphen to divide a word at the end of a line			
19. Uses a dictionary to confirm spellings			
Building Vocabulary			
20. Identifies and uses synonyms and antonyms			
21. Uses language for a specific purpose: • Uses formal and informal language appropriately • Uses words to create a specific effect or Tone			
22. Uses some specialized terminology appropriate to goals			
23. Routinely uses new words when writing			

List Of Assessment Criteria
Writing -- Level 1

Criterion	Details
Complexity of Task	• writes basic personal identifying information (name, address etc.) • copies accurately • completes sentences using a prompt • writes lists of single words or phrases • writes numerals to 100 • writes number words to ten • writes a simple sentence that expresses an idea • writes a sentence using an instructor-presented word • dictates a personal experience that relates to a single topic
Content and Organization	• words or phrases should all relate to topic • sentence should clearly state idea • details may be sparse
Visual Presentation	• printing or writing must be legible • uses small and capital letters • spaces should be left between words
Style of Writing (including purpose)	• writes for self or familiar audience (family) • writes for a specific purpose • uses familiar vocabulary (e.g. names of family members, words from oral vocabulary) • uses simple sentences • total length is 10-15 words
Mechanics grammar, punctuation and spelling)	• can write a complete, simple sentence although sentences may (not always be correctly written • uses capitals at beginning of sentences and period at the end • uses a comma after the salutation in a note • copies accurately • may ask for help with spelling words • there should be no errors in personal information • spells unfamiliar words phonetically • correctly forms the plural of single-syllable words • uses capitals for familiar proper nouns and first person singular

Criterion	Details
Appropriate Writing Activities	• completes a simple form requiring only identifying information • makes a shopping list or a "To Do" list • writes a short one-sentence note to a family member • writes a sentence containing a less familiar vocabulary word • dictates a language experience story and copy it • completes a sentence prompt • writes a sentence about self for a journal • writes activities on a calendar • addresses an envelope (copies the address) • writes an invitation • writes a sentence to describe a picture • copies out a recipe • writes a cheque (using number word prompts) • writes names and phone numbers in an address book

List Of Assessment Criteria
Writing -- Level 2

Criterion	Details
Complexity of Task	• writes personal information beyond identifying information • answers comprehension questions in sentence form • writes single paragraphs of 3-5 sentences • brainstorms and "maps" out ideas • writes a short simple story of several paragraphs • writes a short letter • writes simple instructions • rewrites corrected material to produce a final copy
Content and Organization	• sentence or paragraph should contain a main idea, although it may be simple • there are some details to support the main idea, although irrelevant information may also be included and information may be lacking • there is some sense of organization (e.g. sequence, cause and effect, beginning and concluding sentence) but beginning, middle and end may not be evident • there are some linking words (so, then, etc.)
Visual Presentation	• begins to use cursive writing • uses titles, underlining or letter size for emphasis • uses the correct format for the purpose • uses appropriate margins and spacing • uses visual material if appropriate
Style of Writing (including purpose)	• begins to write for different audiences (familiar and others) (• indicates the reason for writing (I think ... , I am writing to ... , We need ...) • uses appropriate words and phrases to convey meaning and • feeling, although they may be simple and trite begins to use multi-syllable words (words with prefixes, suffixes, compound) • uses some less familiar vocabulary words (perhaps from reading or from a thesaurus) • varies sentences somewhat but may lose control of longer sentences
Mechanics grammar, punctuation and spelling)	• there is some evidence of the correct use of grammar, punctuation and spelling conventions, but errors often occur and may create some confusion in meaning
Grammar	• uses complete sentences • uses correct subject-verb agreement • uses adjectives and adverbs correctly • uses the negative correctly

Criterion	Details
Punctuation	• uses end punctuation correctly • uses commas to separate items in a list, address or date • uses an apostrophe in common contractions and to show possession
Spelling	• spells irregular words phonetically • forms irregular plurals • adds -ing, -ed and -es endings correctly • uses capitals for all proper nouns • uses common abbreviations correctly • may make mistakes in common words
Appropriate Writing Activities	• completes a more complicated personal information form (e.g., job application) • answers comprehension questions in complete sentences • writes a short letter or a postcard to a friend • writes step-by-step instructions on how to do something or how to get somewhere • writes a note to the teacher to explain an absence • writes a short notice for a public bulletin board (e.g. LOST) • writes a journal entry (an experience or event in student's life) • takes a telephone message • writes an ending to a story • writes a paragraph on a topic of personal interest • writes a short accident report

List Of Assessment Criteria
Writing -- Level 3

Criterion	Details
Complexity of Task	• writes for personal and business reasons (longer memos, letters, forms) • completes non-personal forms (e.g. order forms) • uses a variety of formats (formal and informal) • writes short compositions and essays (consisting of several paragraphs) • expresses an opinion • writes reports and summaries containing accurate, factual information • revises and edits own work, using feedback from others
Content and Organization	• paragraphs all relate to a central idea although this main idea may be simple • relevant supporting details are given which help to develop the main idea • the main idea is fairly well-developed (all ideas may not be developed fully) • overall organization shows a beginning, a middle and an end, although some ideas may be "scattered" in the middle • there are simple and appropriate transitions to connect thoughts (also, finally, after, but, etc.)
Visual Presentation	• cursive writing is legible • uses different fonts, graphics, etc., to suit purpose • uses the correct format to suit the purpose • paragraphs are indented and/or spaced appropriately • uses graphs, pictures or diagrams if appropriate and labels them accurately
Style of Writing (including purpose)	• writes for unfamiliar audiences • purpose of writing should be evident and sustained throughout • piece should be written from one viewpoint (personal, general public, etc.) • choice of words is appropriate to purpose, subject matter and ..... audience (formal or informal) • some words are selected to create effect although there may be some cliches and general expressions • uses a variety of sentence structures (simple, compound and complex) and sentence types (questions, exclamations)
Mechanics grammar, punctuation and spelling) **Grammar**	• most common conventions of grammar, punctuation and spelling, are used correctly, but errors occur occasionally and may have some effect on the clarity or overall impact of the writing • uses noun/pronoun agreement correctly • uses pronouns consistently • uses correct verb tenses • uses phrases appropriately to clarify meaning • includes one distinct idea in each paragraph

Criterion	Details
Punctuation	• uses quotation marks for dialogue
Spelling	• uses a hyphen to divide a word at the end of a line • confirms spelling using a dictionary • generally spells with accuracy • checks work and identifies selling errors
Appropriate Writing Activities	• personal and business letters • work memos • more complex forms (income tax) or forms requiring non-personal information (e.g. order form) • minutes of a meeting • book report or article summary • composition which describes or explains something or attempts to persuade • short story (actual or fictional) based on a picture • short research essay (one page) on topic of interest (including outline, rough draft and final copy of essay) • journals which express thoughts, feelings and opinions • compositions which involve imagination and opinion "If I were prime minister .." or "If I won the lottery .." • interview report and short biography of someone in the class • reads a newspaper or magazine article and writes own opinion on the topic • writes an "Ann Landers" response to a problem