# A Guide to Performance Assessment Development

**Competency-based performance assessment design requires that you consider four key questions prior to actually developing an assessment task or scoring rubric:**

* What (content + skills + dispositions) will be assessed?
* Within what (authentic) context?
* Using what assessment format?
* To what degree will students be given choices or be required to make decisions about the task design, approach, resources used, or presentation of their learning?

Before deciding what format the assessment will take or the specifics of what students will “produce” or demonstrate, **identify what the assessment is intended to measure**. This is only an initial brainstorm to clarify your assessment purpose and scope; the details will likely change as the task evolves. For each criterion, generate a list of the expected processes/skills, concepts, dispositions, and thinking strategies you plan to assess. All criteria do not need to be included in the final assessment, but all *should be* considered during this phase of the planning. The **Task Planning** **Tool** can be used to examine existing assessments or to develop new ones. It is designed to walk you through a process to unpack the assessment purpose and to clarify the context, format, and task expectations.

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| **STEP 1:**  Use the five rubric criterion types (in the table below) to identify what will be assessed. **Hess’ CRM** **Tools #1- #5D** ([Cognitive Rigor and DoK | Karin Hess, PhD (karin-hess.com)](https://www.karin-hess.com/cognitive-rigor-and-dok)) can be useful in identifying specific performance indicators and intended DOK levels. All 5 criterion types do not need to be included, but they should be considered in the design phase. Only the last two criteria will allow you to assess far transfer of skills or concepts, so one of them SHOULD be included. | |
| **Criterion** | **Questions Typically Answered by Each Criterion** |
| **Process** | Will the student follow particular processes (e.g., procedures for research or a science investigation; data collection; validating credibility of sources)? (Usually DOK 2 for more complex tasks) |
| **Form** | Are there formats or rules to be applied (e.g., correct citation format; organize parts of lab report; use required camera shots/visuals; edit for grammar and usage)? (Usually DOK 1) |
| **Accuracy of Content** | **Identify competency/competencies to assess**. List essential domain-specific terms, processes, concepts, etc. to be applied. (Usually DOK 1 or 2) |
| **Construction of New Knowledge** | **How will the student go beyond** an appropriate solution and use of processes to gain new insights, raise new questions related to the competency/competencies? (Usually DOK 3 or 4) |
| **Impact** | **How will the final product achieve its intended purpose** related to the competency/competencies (e.g., solve a complex problem; persuade the audience; synthesize information to create a new product/performance; justify call to action) (Usually DOK 3 or 4) |

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| **STEP 2:**  **Identify one or more authentic contexts for applying these skills, concepts, and dispositions in a performance assessment.** Consider how real-world professionals employ these skills and concepts (scientists, artists, historians, researchers, writers, choreographers, videographers, etc.).   * case study or artifact /data analysis * research project – gather, organize, analyze information (e.g., survey, interview, readings) * science investigation (e.g., field study, lab investigation) * problem-solving activity (e.g., engineering design task, dance routine, mathematical model) * other? |

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| **STEP 3:**  **Identify an appropriate assessment format for demonstrating learning.**   * comparing case studies or recommending solutions after case analyses * role playing scenario (e.g., Hess’ STARS template - [Formative and Performance Assessments | Karin Hess, PhD (karin-hess.com)](https://www.karin-hess.com/formative-and-performance-assessments) * peer reviewed products * self-reflections * performance/presentation – oral, written, visual, multimedia, etc. * develop a product – oral, written, visual, multimedia (e.g., infographic, podcast, video documentary) * project-based learning (PBL) or expeditionary learning model * other?   Once you decide on the design format, explore existing models and use one as a template for your assessment design. | | |
| **STEP 4:**  To what degree will students be **given choices or be required to make decisions** about the task design, approach to solution, resources used, or presentation or products of learning? Use this “Shifting Roles” table to consider and make notes about the student’s role in assessment and what is emphasized. | | |
| **Shifting Roles: Moving from Teacher-Directed to Student-Directed Learning** | | |
| **DOK Levels** | **Teacher Roles** | **Student Roles** |
| 1  **Acquire a Foundation** | Ask basic questions (Who? What? Where? How? When?) | Recalls /defines vocabulary, facts, rules, processes  Retrieves information |
| **In this assessment:** | **In this assessment:** |
| 2  **Use, Connect, Conceptualize** | Ask questions to build schema: differentiate parts-whole, classify, draw out inferences  Assess conceptual understanding (Why does this work? Under what conditions?  Ask for examples/non-examples | Explains relationships, sorts, classifies, compares, organizes information  Makes predictions based on estimates, observations, prior knowledge  Proposes problems, issues, or questions to investigate  Raises conceptual or strategy questions |
| **In this assessment:** | **In this assessment:** |

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| 3  **Develop & Construct Meaning** | Ask questions to probe reasoning and thinking, and to promote peer discourse/self-reflection  Link to “Big Ideas” or broader themes  Require proof, justification, analysis of evidence quality and accuracy | Uncovers relevant, accurate, credible information, flaws in a design, or proposed solution and links with “Big Ideas”  Plans how to develop supporting (hard) evidence for conclusions or claims  Researches or tests and refines ideas, solves non-routine problems |
| **In this assessment:** | **In this assessment:** |
| 4  **Extend, Transfer, Broaden Meaning** | Ask questions to extend thinking, explore sources, broaden perspectives/Big Idea *(Are there potential biases? Can you propose an alternative model?)*  Encourage use of relevant and valid resources, peer-to-peer discourse, or self-reflection | Initiates, transfers, and *constructs* new knowledge or insights linked to “Big Ideas” or broad themes  Modifies, creates, elaborates based on analysis and interpretation of multiple sources  Investigates real-world problems and issues; perseveres; manages time–task |
| **In this assessment:** | **In this assessment:** |
| **STEP 5:**  Use **PLC Tool #9** to identify and align success criteria (standards/competency statements), develop student and teacher instructions, and check accessibility (fairness) for all students.  [Formative and Performance Assessments | Karin Hess, PhD (karin-hess.com)](https://www.karin-hess.com/formative-and-performance-assessments) | | |
| **STEP 6:**  Use **PLC Tool #11** to develop a reliable scoring guide/rubric.  [Formative and Performance Assessments | Karin Hess, PhD (karin-hess.com)](https://www.karin-hess.com/formative-and-performance-assessments) | | |