

Remote Assessment Guide



► Introduction

Technology is opening new opportunities in the world of assessing qualifications helping to increase smart and efficient working practices, but, it can also open up the possibility of additional complications if not used correctly.

It can range from your landline, mobile phone, dictaphones, video cameras, email, online storage systems, webcams and computers. The list can be endless and all can be used to increase the effectiveness of your assessment practices.

Whatever form you use, it's important to remember to not just consider what resources you have available but also what your learner has access to and also, what do they have the knowledge and skills to use.

Using technology to assess qualifications is only effective if those using it want to and are able to engage with it.

This guide helps to explain some of the benefits using technology can bring to the assessment of qualifications and also provides hints and tips on how to use it correctly.





► Can Technology Really Help Me?

So you want to use technology? That's great but you need to make sure you have the infrastructure in place before letting it loose on the world of assessment.

You need to ask yourself the following questions:

Will technology bring me the benefits I want?

If the answer to this is, 'what benefits? I'm doing this as it's the latest thing and everyone else is doing it', then it probably isn't the right decision for you.

If you want to use technology to improve the efficiency and availability of learning and overcome operational challenges you may be facing in terms of access to premises due to an

unforeseen situation then technology can really help you out. It's also a great way of increasing savings, not in terms of staffing, etc. but in terms of time and money due to travelling between appointments if your staff members are workplace Assessors.

Just think, without the travelling time, Assessors are able to book appointments with more learners per day helping people to achieve quicker and more efficiently.

Do you have the right resources in place?

There are a whole range of technology solutions available from off the shelf e-portfolio solutions, video conferencing software such as Zoom, e-learning solutions such as Google





Classroom, Canvas, right through to email and telephone.

Each has their advantages and disadvantages and each has their own costs which you need to balance with your overall costs of delivery. Keep in mind the initial costs for implementation and training of staff members.

There is also another consideration of which technological solution is right for you, what is right for your learners?

If learners have to pay or if they don't have the right hardware or software to run the technology then, it doesn't matter how suitable it is for you, it just isn't going to work.

For example, if learners don't have access to computers, internet and webcams then video conferencing software isn't the right choice.

What are the current knowledge and skills levels available in your workforce?

Introducing technology into the delivery of qualifications can take time if your workforce are not familiar with the solution you have chosen. This can cause delays in rolling out the system and possibly an increase in support costs and the number of errors made once it's rolled out due to

human error.

It's often wise to include staff members in the decision making process as some may have used the technology before meaning, by selecting the solution they have used before, they could be your internal champion and provider of CPD training to the other staff members.

This can save you many hours of problems in the future and ensure a greater chance of success in its implementation.

What are your Awarding Organisation's requirements?

Save yourself any headaches in the future and involve your Awarding Organisation in your thought process from the start. They may have some advice on what works best for the particular qualification you are delivering or they may have their own guidance and requirements in the use of technology that you need to keep in mind.

In the end, you don't want your learners to get all the way through their qualification just for the Awarding Organisation to reject your certification claims because the technology wasn't suitable for the qualification you have delivered.



Whichever technology solution you choose to use, don't forget, Assessors are at the front of the assessment process and, as such, are the first line of quality assurance within the delivery process.

An Assessor marks, reviews and assesses evidence produced by the learner involving getting to know the learner and their style and capabilities, planning the generation of evidence with them and supporting the collection of the planned evidence.

As the Assessor gets to know their learner, they will learn what style they write in, the types of wording they use, their abilities and their knowledge. This is important information to ensure they are able to make a truthful declaration when the time comes,

'I confirm that I have assessed all of the work produced and have ensured that the work is that of the learner. I have ensured that during the learning process the evidence is authentic, sufficient, valid and current to the standards required.'

Assessors also ensure that the assessment process runs according to the requirements of the organisation they are employed by and, by virtue of this, the requirements of the Awarding Organisation and the Regulator.

They are often the first to report problems or ask for advice from their Internal Quality Assurer raising points to address to ensure the integrity of the delivery and certification of the qualification.

As such the technology solution needs to maintain that relationship between the Assessor and learner and also support the upholding of the safety, integrity and validity of the delivery of the qualification.





► Don't Forget Your Learner

It could be the first time your learners have come across this technology, it may be they are the next world leader in coding or it could be the thought of switching on a computer is out of this world.

Making sure they have the right support for the technology solution you have chosen is important. Think about providing them with user guides with visuals and also think about the use of plain English, you don't want them to misunderstand what you mean and go off in the wrong direction.

Also, just because you are using technology, delivery and assessment shouldn't be a lonely and isolated experience for learners, provide them with contact details for who to talk to about their qualification and who to ask for support when they are using the technology. It will help the learning experience be inclusive and encourage them to work even harder.



► Start on the Right Foot

Prior to starting delivery of the qualification, you should complete an initial assessment with your learner making sure the subject matter and level of the qualification is the best fit for them and their needs.

This initial assessment should also form part of the planning process so that the most appropriate methods of assessment are chosen to suit the learner and their learning environment whilst also meeting any mandatory assessment methods the qualification may contain.

In the past, you would complete a skills scan and possibly an interview at a set time and in a particular location.

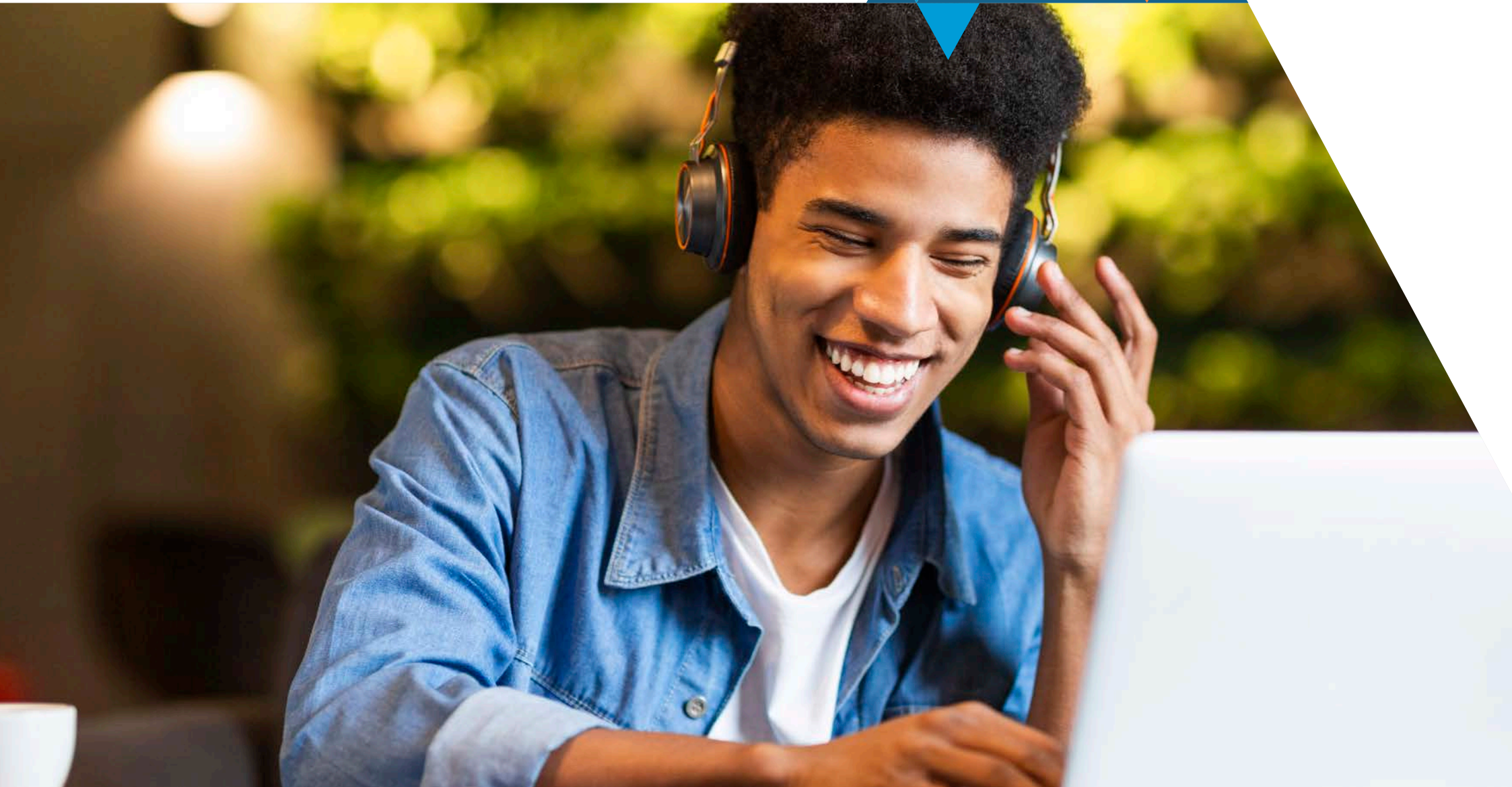
The use of technology can support this with the ability to conduct video interviews meaning you can 'meet' at a time more suitable to each other or you can use online forms on your website using plugins to create multiple choice questionnaires that learners can access when they have time.

If you don't have these types of resources available then you can email a questionnaire to a learner and speak to them over the phone. It doesn't have to be complicated to reach the same outcome.

All of these solutions continue to reach the same outcome and provide the same information as the traditional face to face meeting but provides greater flexibility in how and when it can be carried out.



► Planning is Everything



Prior to starting to gather evidence you should carry out thorough planning with your learner to identify the assessment methods to be used to provide them with the best opportunity to demonstrate their knowledge, skills and behaviours to meet the requirements of the qualification.

Assessors will plan to collect two types of evidence, performance evidence designed to demonstrate what the learner is able to do and knowledge evidence designed to demonstrate what the learner knows and understands.

This is the point at which selecting whether one type of technology will be used throughout or a mix of say video conferencing, telephone or email contact, or even face to face as, just because you have chosen to use technology for certain aspects, it doesn't mean you can't still have elements carried out in person.

This is also the moment to organise how you are going to collect and store the evidence together with your learner. Are you going to use solutions such as Google Drive or Dropbox, off the shelf e-portfolio systems or an alternative method.

Whichever you choose, you should make sure it is easily accessible by the learner, Assessor, IQA and your Awarding Organisation.

It's also a good idea to have some simple instructions ready to provide to your learners as they may never have used the system before and, for those that aren't technically minded, it may be that they email the submissions and the Assessor uploads the documents to the storage solution.

You should provide your learner with an overview of what has been agreed whether in an email, a word processed document, an assessment plan template or using systems built into e-portfolio software.

The qualification may last sometime and, after a few sleeps, it can be tricky to remember what has been agreed.

Agreeing the plan over email or using digital date stamping with digital signatures also ensures that there is a clear audit trail and authenticity to the plans when the time comes for the IQA and EQA to do their bit.

Taking time to plan thoroughly at this stage can save a lot of time and energy in the long run so don't under-estimate its importance.



► It's Time to Assess

So, the planning stage is done, for now, and it's time to collect the evidence, but how?

Carrying out professional discussions, oral questioning or oral statements is easy when making use of technology.

Whether it be by video conference or over the telephone you can choose to either make notes of the conversation, as you would if you were to conduct it face to face, or you can choose to record it.

Most video conference software, eg. Zoom, have the ability to record the video and audio of the conversation meaning you can concentrate fully on what your learner is saying rather than on taking notes.

This also really helps when it comes to proving the authenticity of the evidence as you have a recording right there which you can upload to your storage facility as the evidence.

If you are conducting the discussion via telephone then use a dictaphone or even your phone to record the audio. Again, this is a great way to evidence the authenticity of the discussion or questioning.

Just because you are working at a distance from your learner doesn't mean you can't carry out observations as well. This form of assessment reduces your choices of what you can use as you have to be able to see what is going on and so video conferencing software is the only option for you here.





If your learner is 100 miles down the road or it's tricky to agree a date and time to see them in real life carrying out the task you need, this is a way of being there without being there.

Don't forget that, if you are recording the video feed rather than making notes and there is another person present, eg. a client of the learner, you will need their permission to record and keep the video.

If you are taking notes of the observation rather than recording the video you simply need them to agree to you watching as you would if you were present in the room.

Whatever reason you are using video conferencing, it's just as important to be professional as if you were there in person:

1. Turn on the video - make sure you test your webcam beforehand and turn it on from the outset, no one likes talking to a blank screen
2. Can you hear me? - just as it's important to check your webcam, make sure your microphone is working. It's not a game of charades
3. Pay attention - just because you aren't there in person doesn't mean you can be distracted by the latest

email coming in

4. Leave the phone alone - you wouldn't play with your phone if you were with your learner
5. Appearance is everything - don't wear your weekend or gardening clothes and just remember a neutral background is key, not everyone may appreciate your artwork

Where technology is used to produce a recording, the Assessor should:

1. Identify those present within the assessment
2. Identify the date and time of the assessment, if recorded at a later date, eg. where an audio recording is used for an observation after the event due to background noise, both the original date and time and the recorded date and time should be recorded and an explanation of why it has been recorded at a later time
3. Identify the timeframe for evidence where recorded assessments are in excess of 5 minutes

Don't forget that recordings should be made available in the most appropriate format to ensure that it can be reviewed at a later date.

Where recordings have been conducted using bespoke software packages, you will need to make this software available, at your cost, to allow for your EQA to carry out the checks they need to. Because of this it's usually best to stick to common file formats such as mp4, etc.

Word processed work is not out of the question either, if a learner prefers to complete a workbook, provide written statements or you need some product evidence of what they have done, these can be emailed across for assessment.

Once the evidence has been generated it has to be judged against the requirements of the qualification. This should include both the Assessor and the learner as it should be the agreed opinion of both.

It is essentially the process of indexing the evidence against the requirements of the qualification clearly showing which piece of evidence matches which element of the qualification, similar to a contents page in a book.

When judging evidence, the Assessor should ensure it is:

Authentic — is it the work of the learner?

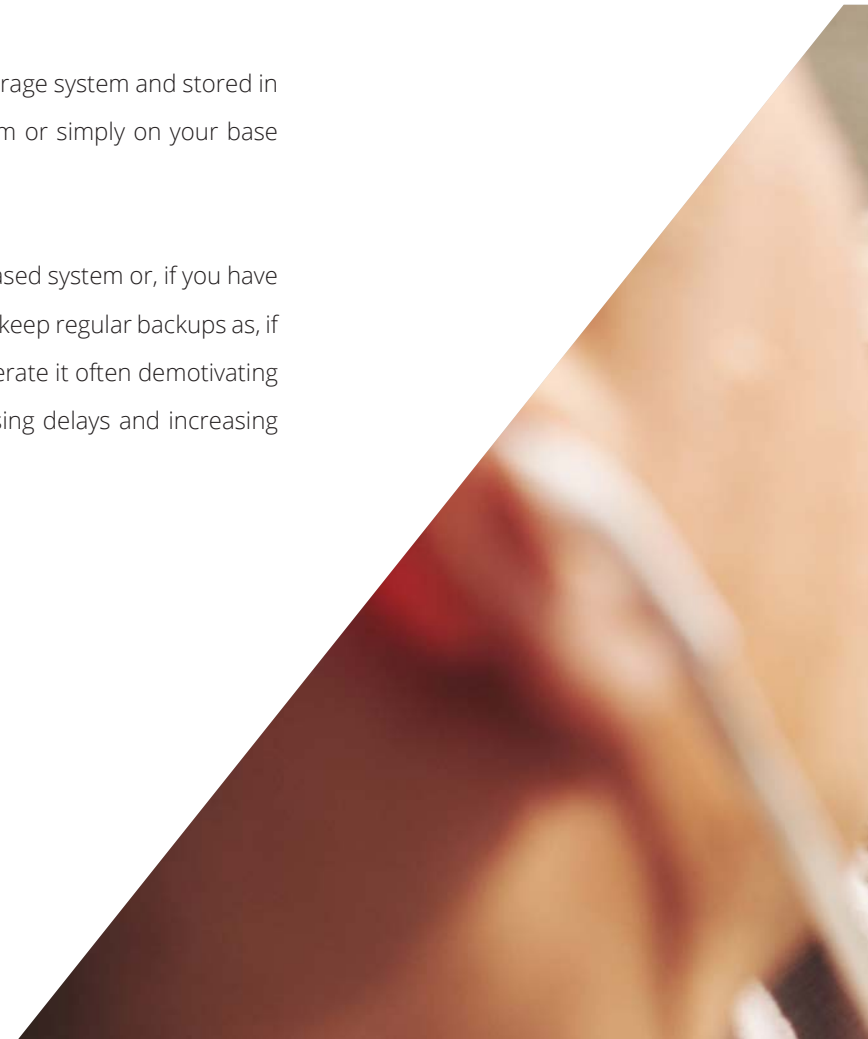
Valid — is the evidence relevant to the qualification requirements?

Reliable — if a different Assessor completed the assessment would they reach the same decision?

Current — does the evidence show the learner meets the qualification requirements at the time of the assessment?

Evidence can then be uploaded to your storage system and stored in your learner's folder, the e-portfolio system or simply on your base computer.

If you can, it's usually best to use a cloud based system or, if you have to use your base computer, make sure you keep regular backups as, if the evidence is lost, you will have to regenerate it often demotivating and disadvantaging your learner and causing delays and increasing delivery costs.





► How Are You Getting On?

Feedback is an essential part of the assessment process. Don't forget the learner isn't an Assessor and they may not fully understand what they need to do and whether they are progressing well through their qualification.

Because of this, it's important to provide feedback at the end of each assessment and continually review the earlier plans to tick off the to do list and add new tasks to it as you progress. Remember earlier, we said your planning wasn't over just yet.

You can provide feedback in different ways when using technology;

1. If you're recording a discussion or observation, why not give your learner live feedback as part of the recording. It's more meaningful when provided at the time and also saves having to set up another call just for feedback. It also helps with efficiency as you then don't need to create alternative pieces of paperwork to reach the same outcome
2. If your learner has emailed in evidence, why not either record the feedback over the phone or through video conferencing software and upload the recording alongside the evidence?
3. If all else fails, there is always an email, this provides a written record of what you have said to your learner and how they have responded

As with the evidence you are generating, make sure that feedback is date and time stamped and that there is evidence of interaction with the learner, whether through their verbal and visual interaction or through written interaction via email.





► Make Sure It's Theirs

With the rise in the use of technology in delivering qualifications, there is also a rise in companies looking to make money out of it, not always in the right way and for the right reasons.

Technology is great when using video conferencing software or telephone calls as you can be sure that it's your learner at the other end but, when you are using essays and statements by email, it's not so easy.

There are many companies out there selling anything from essays to research reports on request and for not much money and, where a qualification means someone is likely to get a job or a progression, it can sometimes be a bit too tempting for the learner.

You can put written evidence through different pieces of software that will check whether a piece of evidence has been plagiarized but, like with the introduction of technology, there is often a cost to this that may be too high for you.

There are web solutions out there for you such as www.grammarly.com and www.duplichecker.com, simply enter plagiarism checker into your search engine to see which is the best option for you.

There is an effective alternative that you can use through a combination of activities. Firstly, pick some random sentences and paragraphs and pop them into your search engine. You'll be amazed at how effective this can be at finding exact or close matches where just a few words have been changed.

Secondly, speak with your learner and have a conversation about what they have sent to you. This can both assure you that it's their knowledge and understanding that produced the work but it can also provide another opportunity to gather evidence through questioning allowing you to expand on their original submission.

Designing the right type of assessment and supporting your learner is a vital part of making sure they don't feel the need to use an essay writing service or copy from other sources. Designing assessments that capture reflective work on their own practices rather than descriptive essays makes it harder to plagiarise.



► Like They Always Say, Integrity is Everything

Just because you are assessing a learner using technology, that should not change anything to do with the qualification. You need to make sure that whether you are assessing face to face or using technology, the level of support, service and consistency of planning, assessment and feedback remains the same.

You also need to make sure that whether a learner is being assessed face to face or through technology, one method doesn't provide advantages or disadvantages to the other. Everyone must get an equal chance of achieving their qualification.



► It's Not Suitable for Everyone





You have to take special care when using video conferencing software to collect evidence where minors (those under 18) are included either as the learner or in the background where they are in a work or home environment.

Both you and your learner has responsibility for ensuring child protection legislation and policies are followed and that minors are not put at risk.

If a minor is included within video and/or photographic evidence it's your responsibility to inform the learner of:

1. the need to obtain the permission from the minor's parent or guardian prior to collecting the evidence

2. the purpose of the restrictions that are in place when making use of video and/or photographic evidence
3. the requirement to retain evidence for the purpose of quality assurance and the timeframe that evidence will be retained
4. the requirement to store video and/or photographic evidence securely
5. the associated child protection legislation

It is often easier to not use technology if your learner is under 18 or if they work in an environment where children are. Technology should make assessment more efficient, not put additional challenges and considerations in the way.

► Quality All the Way

With the use of technology, gone are the days of having to carry around large heavy folders from room to room and place to place as the IQA tries to get their sampling done.

Now whether the IQA is at home, the office or on the move, they can access folders anywhere to carry out their sampling and authorise the certificates as they go. This means turn around times can be faster as the IQA has more opportunities to be able to look at folders when they can rather than when they can get to the office to pick them up.

It also means that, if you are using a contracted IQA, it is easier to fit in their diary as they no longer need to come to you.

The IQA can sample the folder, upload their report to the storage system and video conference or telephone the Assessor to provide that all important feedback on how they have got on.

It's even easier when they deal with the Awarding Organisation as on demand access can be given so that certification turnaround is quicker as you no longer have to wait 6 months for your next EQA visit.



► Like Two Peas in a Pod

Just because you all work remotely doesn't mean you can't keep those all important similarities. Don't forget one of the important parts of qualification delivery, validity.

It shouldn't matter where the qualification is being delivered or by whom, the process and chance of the same outcome being achieved should be maintained.

Standardisation is key and it can still take place even if you aren't in the same room. Video conference software now means you can hold meetings at any time and from any location.

Many allow multiple people to sign into the same meeting and, for those that can't, they often have a dial in facility as well.

Distribute your agenda by email before hand and also any important documents you want to talk through and then on the day you can even share your screen to show people what you are talking about whether it be a presentation, some paperwork or even a demonstration of the latest piece of technology.

► And Finally

Hopefully this guide has helped you start seeing how technology could bring whole new possibilities of delivery of qualifications for you and helped to highlight different ways in which you could start to use it with confidence.

Don't forget that your Awarding Organisation will always be happy to help you as it is in their interests as much as yours and your learner's that it is done properly from the outset.



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