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# Performance Assessment Strategies in WIL Guide

CREATING QUALITY WIL ACROSS CANADA

# Performance Assessment Strategies in WIL Guide

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# CONTENTS

# Frequently Asked Questions

## WHAT IS ASSESSMENT IN THE CONTEXT OF WIL AND WHY IS IT IMPORTANT?

Assessment in the context of work-integrated learning (WIL) is the process of evaluating student competencies within a professional environment. Assessment is a fundamental part of WIL to ensure students apply academic learning and gain the skills they require to be work-ready.[1]

## WHAT IS THE ROLE OF A WORKPLACE SUPERVISOR IN A WIL PLACEMENT?

The role of the workplace supervisor varies significantly across types of WIL — supervisors of apprentices may have more formalized responsibilities than supervisors of interns, for example. In general, a workplace supervisor is responsible for working alongside the academic supervisor and the student to negotiate the student's workplan and duties. They typically help with onboarding, while ensuring the student has access to required technical equipment, as well as ongoing supervision and mentorship throughout the placement to contribute to an overall evaluation of the student's performance.[2]

## WHAT ARE THE ABCDS OF LEARNING OUTCOMES?

Learning outcomes should provide detail on what students will achieve, value and/or know by the end of their placement. When developing learning outcomes with students and academic supervisors, keep the following in mind:

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1       Judith McNamara.  "The Challenge of Assessing Professional Competence in Work Integrated Learning," *Assessment and Evaluation in Higher Education*, 38, no.2 (2013): 183-184.

2       "Roles and Responsibilities of the Workplace Supervisor," Innovative Research Universities, accessed October 28, 2020, https://www.murdoch.edu.au/docs/default-source/industry-community/work-integrated-learning/roles-and-responsibilities-of-the-workplace-supervisor.pdf?sfvrsn=70f08500_2.

- **Learning audience**: Who are the learners? What are their learning needs and career goals?

- **Learned behaviors**: What will students be able to do at the end of a placement? What will they know about your industry, program of study, and/or career?

- **Context for learning**: Where will the learning take place at your organization? What context should be kept in mind when describing learning outcomes?

- **Degree**: Realistically, with consideration for the type and length of the WIL placement, how much will students be able to achieve?

Depending on the type of WIL student you are supervising, you may need to consult more-or-less with post-secondary programs and/or provincial/territorial training authorities:

- If you are supervising post-secondary students undertaking a structured work experience, you should discuss program level learning outcomes and requirements with the student's academic supervisor.

- If you are supervising apprentices undertaking on-the-job training, you should review program requirements, tasks, and related learning outcomes for the apprentices under your supervision. You can find out more information about training standards by contacting your provincial/territorial apprenticeship authority.[3]

## WHAT ARE SOME EFFECTIVE STRATEGIES FOR WIL ASSESSMENT?

- Integrate student self-assessment when appraising performance: Student self-assessments will help ensure that

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3       For a list of training authorities, see: http://www.red-seal.ca/contact/c.4nt.1ct-eng.html. And if you are supervising an apprentice in a Red Seal Trade, you can review Red Seal Occupational Standards on the Red Seal website: http://www.red-seal.ca/trades/tr.1d.2s_l.3st-eng.html, accessed October 28, 2020.

the student feels they have a role to play in the assessment process and provides the employer with a well-rounded perspective of the student's performance. This involves requesting students to conduct a written or oral self-evaluation that an employer can review and verify.

- Integrate feedback from multiple sources: To ensure evaluations of student performance are fair, inclusive, and comprehensive, supervisors are advised to gather the insights of others who have interacted with the student, including employees, managers, and student peers.

- Conduct regular check-ins:  Check-ins during the placement are important for ensuring that students remain on-track and engaged. Frequent check-ins are all the more necessary for remote or e-WIL opportunities that many employers have pivoted to as a result of the COVID-19 pandemic.

## HOW OFTEN SHOULD I CHECK IN WITH STUDENTS?

It depends on your relationship with the student and how much you achieve in each meeting. Workplace supervisors typically check-in with students once a day, while some find it easier to check-in once a week. Regardless of how often you check in, ensure you give yourself the time to build trust and open lines of communication with students undertaking a placement at your organization.

## WHAT ARE EVIDENCE-BASED APPROACHES TO ASSESSING SOCIAL AND EMOTIONAL SKILLS?

Beyond technical skills, employers are often interested in assessing a student's social and emotional skills. Instead of relying exclusively on rating scales to assess critical thinking, communication, or other in-demand social and emotional skills, consider using evidence-based assessment frameworks. An international review of social and emotional skill assessment frameworks has identified the following widely used and accepted psychometric measurement tools:[4]

4        "Measuring Social and Emotional Skills: A Toolbox." Conference Board of Canada, accessed October 28, 2020. https://www.conferenceboard.ca/focus-areas/education-skills/future-skills/measuring-social-and-emotional-skills.

- Emotional and social competency inventory (ESCI)

- Emotional quotient inventory (EQ-I)

- Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT)

For more information on these tools, review the assessment resources section of our strategies document.

# Assessment Practices in Work-Integrated Learning

Performance measurement and assessment of students is a complex yet essential part of the WIL experience.[5] The goal of assessment in the context of WIL is to offer valuable feedback to students and post-secondary educators, while also giving employers the opportunity to train potential entry-level employees before they are officially hired. Even if a student is not eventually employed by the host organization, managers and supervisors can nonetheless contribute to building a strong workforce in their sector that benefits their industry, community, and local economy.

During the summer and fall of 2020, we spoke to managers, supervisors, and senior executives in several industries across Canada to get a better sense of how they assess students within the context of WIL. We wanted to better understand the methods by which supervisors measure the progress of WIL students in their workplace and compare that to existing research, to determine best practices for assessment in the workplace during a placement.

We also sought to get a better grasp of how supervisors and managers have adapted performance management strategies in the wake of COVID-19

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5       Rola Ajjawi, et al., "Aligning Assessment with the Needs of Work-Integrated Learning: The Challenges of Authentic Assessment in a Complex Ctontext," *Assessment & Evaluation in Higher Education* 45, no. 2 (2020): 304-316.

with the goal of identifying how employers can continue to effectively assess WIL students, specifically for remote or virtual WIL opportunities.

Over the course of our consultations, we identified five best practices for assessment of student performance that managers and supervisors at host organizations have applied in their own workplaces across Canada. As we heard, attention to best practices for assessment have become more important in the context of COVID-19, which compelled many employers to rapidly pivot to remote or virtual WIL placements requiring new approaches to assessment.

## 1. UNDERSTANDING ROLES & RESPONSIBILITIES

Building awareness of the different roles and responsibilities of all those involved in a WIL experience is an important first step in understanding what is required of the workplace supervisor, academic supervisor, and student. Recognizing the different roles of everyone involved, in turn, reinforces that assessments is a collective responsibility. Or as one manager we spoke with described it, assessment is "an iterative, collaborative activity."

### Workplace supervisor

A workplace supervisor is responsible for working alongside the academic supervisor, if there is one, and the student to negotiate the student's workplan and duties. They typically help with onboarding, while ensuring the student has the technical equipment they need. They provide ongoing supervision and mentorship throughout the placement to contribute to an overall evaluation of the student's performance at the end.[6]

6   Innovative Research Universities, "Roles and Responsibilities of Workplace Supervisor."

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### Academic supervisor

Not all placements include an academic supersor, but where they do an academic supervisor is responsible for working alongside the workplace supervisor in negotiating a workplan and ideally designing learning objectives that effectively integrate academic theory with students' workplace experience. Academic supervisors are also responsible for providing support to students as is required, including acting as a liaison and helping resolve conflict that may arise between the student and their employer.[7]

### Student

The student has a responsibility to apply themselves and build upon their competencies and skills during a work placement. This includes fulfilling their agreed upon work-related duties, maintaining a high level of professionalism, responding constructively to the feedback of workplace and academic supervisors, as well as their peers, co-workers and/or potential clients and the public.[8]

## 2. SETTING CLEAR OBJECTIVES, OUTCOMES & EXPECTATIONS

Collaboratively determining objectives or learning outcomes between the workplace supervisor, student, and academic supervision at the initial phases of a placement clarifies what is required and ensures expectations are transparent and realistic based on WIL type, length, and scope.

Learning outcomes describe what students should be able to know and do coming out of a placement experience. In structured work experiences, learning outcomes may be described in general terms at the program level but academic supervisors, workplace supervisors, and

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7   Andy Martin and Helen Hughes, *How to Make the Most of Work Integrated Learning: A Guide for Students, Lecturers and Supervisors*. Massey University Press, 2009. https://www.waceinc.org/papers/How%20To%20Make%20The%20Most%20of%20Work%20Integrated%20Learning.pdf

8   Ibid.

students are required to set specific outcomes for each placement. Specific learning outcomes for a placement should include action verbs, objects of learning, and give structure or purpose for the learning experience. When working with students to articulate specific learning outcomes for their placement, remember the ABCDs of learning outcomes:[9]

- Who is doing the learning?

- What will learners be able to achieve, feel, or know at the end of their placement?

- Where will the learning be situated and under what circumstances?

- How much will the learner accomplish by the end of their placement?

Learning outcomes should provide realistic expectations for both the workplace and the student while aligning with student learning goals and career interests.[10] Workplace supervisors emphasize the importance of this step in managing performance throughout a placement.

A manager from the retail industry reported, "as part of a performance management process ... we set the expectations in the beginning, have regular check ins to see how those objectives are moving forward and have a debrief at the end. So, it really is in my mind back to setting those expectations from the beginning. They can be moveable obviously but know that this is the goal you're working towards; I think that helps a lot for us."

## 3. CONSISTENT FORMATIVE ASSESSMENT

Consistent and regular formative assessment including check-ins or other feedback throughout a WIL placement is an integral part of assessment and performance measurement. These check-ins are important to developing a student's competencies over the course of a placement. Fostering regular, constructive feedback and communication also helps ensure students effectively integrate into a workplace.

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9        Ashley Stirling et al., *A practical guide for work-integrated learning*, Higher Education Quality Council of Ontario, 2016. https://heqco.ca/pub/a-practical-guide-for-work-integrated-learning-effective-practices-to-enhance-the-educational-quality-of-structured-work-experiences-offered-through-colleges-and-universities/
10       Ibid.

One supervisor from an aerospace company explained that check-ins are valued by the organization's interns, who have made it clear that consistent and regular feedback from supervisors is something they desire: "Integration is important, communication, frequent 'touch points' with supervisors, clearly this is something that has been mentioned to me… that is sought after as well."[11]

Workplace supervisors should be mindful of communication style preferences. In systematic training, apprentices may prefer text messaging and e-mail over voice communication, whereas older journeypersons may prefer verbal communication.[12] It is important to keep these kinds of generational differences in mind when offering formative feedback. Open lines of communication are essential to both giving and receiving feedback on strengths, weaknesses, and areas for improvement. Try checking in with students about their preferences for staying in touch, so they are comfortable asking questions and reaching out with any questions or concerns.

In the context of remote or virtual WIL, especially as a result of the COVID-19 pandemic, these check-ins are even more vital to ensure that students remain engaged throughout the placement so that employers can experience the full benefits of WIL.

## 4. ENGAGING THE STUDENT

Students who are continuously engaged throughout their WIL placement will learn and integrate into a workplace much more effectively. This will create the circumstances for a more favorable assessment by the employer, while also ensuring that students feel empowered to contribute to the organization.[13]

Including student reflection or asking for self-assessments will, in turn, ensure that the student feels they have a role to play in the assessment process and provide the employer with a well-rounded perspective of the student's performance. This involves requesting students to conduct a self-evaluation that an employer can review and verify as is appropriate.

11     English to French translation from Quebec Roundtable (29 July 2020).

12     Andrew Bieler, "Bridging Generational Divides: Advancing Digital Skills in Canada's Apprenticeships and Skilled Trades Ecosystem," The Conference Board of Canada, 15 September 2020. https://www.conferenceboard.ca/e-library/abstract.aspx?did=10707.

13     "Employer Research Kit for Work Integrated Learning," ITAC Talent: 2018, 16. https://itactalent.ca/wp-content/uploads/2018/07/Career-Ready-Toolkit.pdf.

A supervisor from a non-profit in the Information and Cultural Industry explained, "For us we use a double review process. So, I assign a score on aspects of their learning, they assign a score for themselves, we discuss, write remarks. The same way probably a lot of performance reviews are done."

The resources needed to encourage student self-assessment vary depending on one's industry and organization. Some best practices for designing student self-assessment include the following:

- Ensure students are prompted to reflect on elements of their work that map directly to the objectives or learning outcomes initially agreed upon at the beginning of the placement.

- Encourage students to develop an action plan for improving or building upon the skills they learned to ensure they continue to grow as a professional following their WIL experience.

- Meet with the student to discuss the results of their own self-assessment alongside the supervisors to compare feedback and ideally come to a mutual understanding of the student's performance over the course of the placement.[14]

General templates are also available that workplace supervisors can use, mostly from post-secondary institutions.

## 5. FEEDBACK FROM MULTIPLE SOURCES

When conducting an assessment, workplace supervisors will benefit from considering feedback from peers and other employees at their organization to ensure that their evaluation of the student's performance during their placement is fair, inclusive, and comprehensive. To do so, employers are advised to gather the insights of others who have interacted with the student, including other employees and managers, student peers, etc.

As one supervisor from the health and social services industry explained: "I like to combine a few different approaches. One is self-assessment. It's always interesting to see and hear what the individual has done. The other is feedback from the individuals they have worked with. Where did they start? How did they improve?"

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14      Ajjawi et al. "Aligning Assessment with Needs of Work-Integrated Learning."; Theresa Winchester Seeto, "Assessment" in Quality Standards for Work Integrated Learning, Australian Council of Deans of Science, 2019.

In the context of apprenticeships, obtaining feedback is a more formal process, in which employer sponsors are responsible for assessing on-the-job training by signing off on hours and competency requirements in logbooks. In structured work experiences, however, the assessment requirements, from multiple sources or otherwise, tend to be more informal or at least not as standardized. In either case, the goal nevertheless remains the same: to maintain accountability and ensure that the assessment is fair.

One supervisor in a marine manufacturing company outlined their process in the following way: "Apprentices and their mentors sign off on each competency individually once they are confident the apprentice is proficient in that competency, then team members meet with both apprentices and mentors/employers to review and record the progress as documented in the logbooks."

# Assessment Challenges

In conversation with workplace supervisors and managers, we identified several assessment challenges. The nature of these challenges differs significantly across systematic training, structured work experiences, institutional partnerships, and emerging WIL models due to variations in assessment techniques. But for placement-based WIL, supervisors identified the following:

- Constructive assessment requires a close alignment between academic learning and workplace objectives. However, alignment requires close collaboration between academic and industry partners that can be difficult to achieve with limited capacity, time, and resources.

- WIL assessment requires a supervisor to closely track a student's progress, which ideally requires frequent check-ins. These supervisory duties may be time-consuming.

- Supervisors report varying experiences with performing assessment duties remotely, and there is limited data to inform best practices for remote check-ins via online platforms. If a strong rapport and communication are not established and maintained, however, it may minimize student engagement with the workplace and possibly contribute to student mental health concerns that have already been exacerbated by the COVID-19 pandemic.

- Implicit or explicit bias may impede one's ability to conduct a fair and constructive assessment. Although research has suggested that WIL can help improve an organization's capacity to recruit and hire diverse candidates, the engagement still needs to be intentional and reflective.[15]

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15    "Creating Diversity and Career Opportunities in the Skilled Trades: Case Studies

# Methodology

We facilitated eight 90-minute live online focus groups with workplace supervisors including four from SMEs (<200) and four from 200+ organizations. Virtual focus groups used live polling and discussion with a small group of managers at host organizations. Discussions addressed supervisor experiences of mentoring and assessment, as well as broader topics related to barriers and enablers of employer participation in WIL. We also engaged business owners and CEOs, senior executives, and workplace supervisors in four 10-day asynchronous online communities.

This work was part of a larger consultation project. In the larger project, we conducted 44 group consultations and 23 individual consultations on WIL. In total, we engaged a total of 620 individual participants in this consultation project.

Alongside the consultations, we conducted a literature review looking at peer reviewed articles and sector resources related to assessment in WIL.

## Data analysis

Focus groups were recorded, transcribed, and analyzed using NVivo 12 qualitative data management software. A thematic coding process was used to analyze the transcript content.

of Organizations Assisting Visible Minority/ Racialized Groups Seeking a Career in the Skilled Traces," Canadian Apprenticeship Forum, 2010.

# Selected Assessment Resources

"Developing an End-Point Assessment Plan," Institute for Apprenticeships & Technical Education. https://www.instituteforapprenticeships.org/developing-new-apprenticeships/developing-an-end-point-assessment-plan/

"Formative and Summative Assessment for Work Term Performance," CEWIL Canada, January 17, 2012. https://www.cewilcanada.ca/cgi/page.cgi/_article.html/_Co-op_Best_Practices/Formative_and_Summative_Assessment_for_Work_Term_and_Performance

"Measuring Social and Emotional Skills: A Toolbox." Conference Board of Canada. https://www.conferenceboard.ca/focus-areas/education-skills/future-skills/measuring-social-and-emotional-skills

"Work-Based Assessment of/ for/ as Learning: Context, Purposes and Methods," National Forum for the Enhancement of Teaching and Learning in Higher Education, October 2017. https://www.teachingandlearning.ie/wp-content/uploads/TL_WorkBasedAssessment_Insight_oct2017_WEB-with-doi.pdf

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