### Prior to Assessment

Excellcia Lodge has created a Workplace Assessor’s Manual as a guide to assessment procedures and the documents that need to be collected at each of the three stages of the assessment process. You will need to refer to this document continually to ensure that your assessment maintains the consistency that Excellcia Lodge requires of its workplace assessors. Feel free to access the manual as often as you like from on top of the filing cabinet in the Training Room. The manual is broken-up into three sections, one for each stage of the assessment process.

The manual section on **Prior to Assessment** offers guidelines on the following:

- Linking assessment to a unit of competency
- Designing an observation checklist for assessment
- Writing a bank of questions for assessment
- Checking assessment tools against the principles of assessment
- Excellcia Lodge Prior Consultation Checklist

### Steps

- Choose a staff member from your workplace/department to assess
- Decide on a task that you need to assess to determine their current competence
- Explain how the assessment task links to the unit of competency
- Copy and attach the unit of competency making sure to include the following:
  - all element/s
  - all performance criteria
  - range of variables
  - evidence guide
- Design your observation checklist making sure that the following are included:
  - a heading that details what the checklist is assessing and gives the unit of competency code and title
  - criteria in checklist format
  - name and signature of the assessor (this is you)
  - name and signature of the candidate (the person you are assessing)
  - name and signature of workplace assessment mentor
  - the date of the assessment
- Design a bank of questions to determine underpinning knowledge/skills/attitudes related to the task you are assessing. The bank of questions should include:
  - a heading that details what the bank of questions is assessing and gives the unit of competency code and title
  - criteria in checklist format
  - name and signature of the assessor (this is you)
  - name and signature of the candidate (the person you are assessing)
  - name and signature of workplace assessment mentor
  - the date of the assessment

### Documents to be added to your evidence folio

- Copy of Unit of Competence
- Assessment of each against the main principles of assessments as follows:
  - fair
  - reliable
  - valid
### Assessing and Title
- Assessing and gives the unit of competency code and title
- A space for the verbal or written response to each question
- A separate list of preferred answers
- Name and signature of the assessor
- Name and signature of the candidate
- Name and signature of workplace assessment mentor
- The date of the assessment

- Check the assessment tool against the main principles of assessment
- Trial the assessment tool on a person/s other than your candidates
- Make any adjustments to the tool based on feedback from the trial
- Meet with the candidate you will be assessing and complete a Prior Consultation Checklist, a template of this is available in the Assessor’s Manual on the filing cabinet in the Training Room
- Ensure that the assessment area is organised and safe
- Plan what you will say and do to put the candidate at ease and prepare them for the assessment

- Current
- Authentic

- Results of the trial – list any adjustments you needed to make.
- Completed and signed Prior Consultation Checklist
- List of planned strategies to put candidate at ease

### During the Assessment

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- Welcome the candidate, put them at ease and go over the assessment procedure again to ensure they know what is going to happen
- Assess the candidate by checking their performance against the observation checklist
- Assess the candidate using the bank of questions and record their answers
- Make a judgement about the success of the candidate
- Provide feedback to the candidate
- Ask the candidate for feedback on the assessment by asking them to complete a feedback questionnaire

- List of strategies actually used to put candidate at ease
- Completed checklist signed
- Completed questions signed
- Candidate’s completed feedback questionnaire
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- Questioning as a method of gathering evidence

**After the Assessment**

| ☐ Record formally the candidate's results and sign and date with the candidate |
| ☐ Store the candidate's results |
| ☐ Report on your assessment process (follow Excellcia Lodge format) |
| ☐ Make recommendations as an effective contribution to the Excellcia Lodge assessment system evaluation (follow Excellcia Lodge format) |
| ☒ Written report including the recommendations |

The manual section on **After Assessment** offers guidelines on the following:

- Providing effective feedback on Assessment
- Gather feedback on the assessment from your candidate
| Excellcia Lodge format for reporting on the assessment |  |  |