

PROCEEDINGS OF THE COLLOQUIUM ON COMPETENCY-BASED LEARNING AND ASSESSMENT

8 June 2016
Wellington, New Zealand





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KEY AREAS OF ATTENTION IN CURRENT PRACTICE AND FOR FUTURE INTENTION



Maintaining a learner focus - value to the learner;
learner confidence



Methodologies in a changing world - assessment
methodologies; workplace relevance; technology
in assessment; evidence; communities of
practice; assessment for learning



Supporting diversity - cultural values and
contextualisation; equity; fairness



Supporting progression to further study and
employment - pathways; student records of
achievement



Dissonance at the system level - outcomes
focus; investment approach; systems
architecture

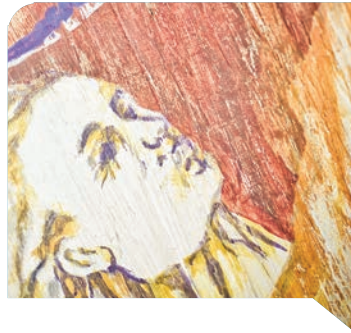


Tutor and organisational capability



Recognising quality

FOREWORD



Given the complexity and diversity of what we are trying to do, perfection for all will always be an unattainable ideal, but more constructive discussion like this can only build the momentum for improvement.

This publication summarises the proceedings of a half day, by invitation colloquium we held in honour of Susan Patrick, 2016 Eisenhower Fellow on the occasion of her visit to Wellington in June this year.

It is quite some time since we had a public discussion about assessment in general, never mind competency-based learning and assessment. The superb quality of the presentations and the level of discussion show that it is well overdue and we need to continue to have discussions like these. We have reasonable - but not necessarily complete consensus - on principles, but there are significant challenges post the Targeted Review of Qualifications and continuing questions about whether our systems and funding processes align with these aspirations. At the practice level there are continuing questions about whether our processes work for learners, employers and other stakeholders as well as they should.

Given the complexity and diversity of what we are trying to do, perfection for all will always be an unattainable ideal, but more constructive discussion like this can only build the momentum for improvement. We would like to thank Susan Patrick for her engagement and enthusiasm for the process; it was a great privilege to host her.

We would also like to thank most sincerely all the presenters and invited participants for making the morning such a stimulating one. We would also especially like to thank the attendees who freely shared their notes with us to help us compile this record of the discussion.

In particular, we would like to thank Leesa Irving from Above and Beyond, who developed the first draft of these proceedings.

Presentations and full texts available at:
www.akoatearoa.ac.nz/competency-based-learning-colloquium

Liz Bowen-Clewley
Competency International Limited

Peter Coolbear
Ako Aotearoa

Josh Williams
Industry Training Federation

EXECUTIVE SUMMARY

August 2016

In honour of the visit to Aotearoa New Zealand by the 2016 Eisenhower Fellow, Susan Patrick, Competency International Limited, Ako Aotearoa and the Industry Training Federation jointly hosted a by-invitation half-day colloquium on competency-based learning and assessment (CBLA). This was held in Wellington on Wednesday the 8th of June 2016.

The event adopted the format of ten, 10-minute presentations by different educational professionals on topics of their choice relating to the theme of competency-based learning and assessment. These are presented in the body of this report and are available in full via the Ako Aotearoa website at: www.ako.aotearoa.ac.nz/competency-based-learning-colloquium

A range of inter-related themes came out of the presentations and subsequent discussion that identify key areas of attention in current practice and/or future intention.

These were as follows:

- Maintaining a learner focus - value to the learner, learner confidence
- Methodologies in a changing world - assessment methodologies, workplace relevance, technology in assessment, evidence, communities of practice, assessment for learning
- Supporting diversity - cultural values and contextualisation, equity, fairness
- Supporting progression to further study and employment - pathways, student records of achievement
- Dissonance at the system level - outcomes focus, investment approach, systems architecture
- Tutor and organisational capability
- Recognising quality



In the end what we do should be providing the best possible value to every learner. It is about credentialing what they have learned, however and wherever they have learned it. Assessment should support learning both in clearly identifying for each learner the next steps in their learning journey and – ideally – in supporting the learning process itself. Recognising and valuing what learners can do is critical to establishing learner confidence and mobility.

Effective competency-based assessment requires a consensus of understanding about what we want graduates to be able to do. This means establishing effective communities of practice where there is common understanding about what standards mean. Outcomes should be flexible enough to accommodate changing industry requirements, especially through the adoption of new technologies. The importance of assessment being about the ‘things that matter’ in the workplace is critical to the value placed on a qualification by both employers and learners.

Additionally, technology offers considerable opportunities for more effective gathering of assessment evidence that better suit learner needs; this, however is not without its risks and issues around integrity of assessment and the digital literacy of all learners needs to be covered off. In the end assessment is all about evidence about what a learner, knows and how they can apply this knowledge in real situations. The quality and not the quantity of evidence is critical to good assessment. Better assessment, better professional judgements rely on active communities of practice prepared to have focused debate on what is important and relevant.

Assessment strategies and approaches need to address issues of cultural diversity and socio-economic and/or gender disadvantage. Overt consideration of the cultural values of the learners and the organisation is fundamental to learner-centred assessment.

Often paired with equity, fairness has a broader meaning in that assessment must be fair and not favour individual learners; it goes to matters of integrity and consistency across different providers and assessors and it goes also to constructive alignment between what is being assessed and what is being learned. Ultimately it creates the reputation and value of the credential earned.

However good our assessment processes are, if they don't support the learning and employment progression of each learner, they achieve little. A key feature of effective pathways is that they allow learners to define purpose for themselves. They need to be flexible so learners are not unduly locked into programmes of study and unable to change direction without penalty. The importance of assisting learners to make clear, well informed choices is critical.

There was a clear consensus that records of achievement are owned by the student and that such records therefore need to be learner centred, meaningful to employers and provide much better ability to bridge/ pathway across different parts of the system.

It is unclear at present whether the outcomes focus of the Targeted Review of Qualifications (TRoQ) is becoming a reality. There are some concerns that parts of the bureaucracy have yet to catch up with the aspirations of the policy. Similarly, there are dissonances between current funding approaches and the principles of the new qualifications framework. The present system tends to invest in inputs, assessment tends to credential outputs, but what we really want is to invest (both in terms of funding and effort) in outcomes for learners.

The present funding regime has not yet adjusted to the new qualifications model. Similarly, funding approaches need to clearly distinguish between funding for recognition of learning and funding for supporting learning: both add value to the learner and employer; both carry costs.

Good assessment practice is difficult in theory and even harder in practice. We need strategic allocation of resources into building our assessment capability, at tutor/ assessor level, at organisational level and at system level.

So the final question is how do we identify quality competency-based assessment and learning? It comes down to a question of value to the learner, future employers and other stakeholders. Best practice for assessment sits in a tripartite relationship between the learner, the assessor and industry experts. The assessor is the facilitator of the process. The discussion reinforced the importance of assessor training and support mechanisms that foster communities of practice and consistency management.

As more integrated and embedded approaches to competency-based assessment are embraced, both challenges and barriers lie ahead in the New Zealand CBLA landscape. Two significant barriers would appear to be resistance to change (right across the diverse parts of the sector), and the systems architecture needed to support and facilitate the necessary flexibility in individual learner journeys from education to employment. Complicating this picture, but offering significant opportunities in many cases, is the pace of technological advancement.

Challenges are present across a number of areas. From a competencies perspective, we need to find a way to express skills and abilities that makes sense to everyone. There is also consensus that there is a need for a core base of transferable skills, employability skills, for there to be value for the learner, and workplace relevance.

In the end, assessment should be designed to support learning for every individual in Aotearoa, New Zealand's increasingly diverse society.

INTRODUCTION

In honour of the visit to Aotearoa New Zealand by the 2016 Eisenhower Fellow, Susan Patrick, Competency International Limited, Ako Aotearoa and the Industry Training Federation jointly hosted a by-invitation half-day colloquium on competency-based learning and assessment (CBLA). This was held in Wellington on Wednesday the 8th of June 2016.

Susan's objective(s) during her time in New Zealand was to examine ways to create broader systemic change in policy and practice, explore emerging innovations in competency-based education and examine the transformation of teaching and learning practices that begin to address questions of equity by closing gaps, increasing opportunity and expanding access to a world-class education.

The move toward competency-based learning started forty years ago. It was a move away from norm-referenced to criterion-referenced. Why? To improve transparency of the learner and what they know and can do and to provide clarity on learner profiles of student achievement over time, including through portfolios of student evidence of demonstrated competence.

New Zealand has been exploring future directions in competency-based learning and assessment for decades. The movement is grounded in social justice and equity and has been a deliberate attempt to place value on all forms of learning.

The event adopted the format of ten, 10-minute presentations by different educational professionals on topics of their choice relating to the theme of competency-based learning and assessment. The presenters and their presentations are listed on the following page.

Susan Patrick

President and CEO

International Association for
K-12 Online Learning (iNACOL)

2016 Eisenhower Fellow



For the past 15 years, Susan has been at the forefront of a revolution in education, as online learning has expanded student access to courses and excellent teachers, harnessing the Internet to level the playing field. First at the U.S. Department of Education and now at iNACOL, Susan works with education leaders nationally and internationally to set the direction for the field of personalised, next generation learning, publishing original research on competency-based education, blended and online learning. She leads an independent, non-partisan, nonprofit organisation providing policy advocacy, conducting research, developing quality standards, and driving the transformation to competency-based, blended and online learning forward. Susan serves as a trusted advisor to high-level policy-makers.

PRESENTERS AND TOPICS FOR 2016

PRESENTER

Rod Bentham

Team Leader,
Qualifications Services, NZQA

Andrew Kear

Group Manager,
Standards Leadership, Building and Construction
Industry Training Organisation (BCITO)

Anthony Campbell

Academic Lead Vocation and Foundation Programmes,
Te Wānanga o Aotearoa

Ben Gardiner

Service Desk Co-ordinator for the Literacy and Numeracy
Assessment Tool for Adults/Researcher,
New Zealand Council for Educational Research (NZCER)

Josh Williams

Chief Executive,
Industry Training Federation (ITF)

Virginia Archer and Adelaide Reid

Manager Marlborough and Nelson & Researcher,
Community Colleges New Zealand

Liz Bowen-Clewley

Chief Executive Officer,
Competency International Limited (CIL)

Marilyn Brady

General Manager Technical Capability,
Fonterra Co-operative Group
(Presented by Jack Doherty)

Kamuka Pati

Lecturer,
Unitec Institute of Technology

Jenny Grainger

Director,
Credential Potential Limited

TOPIC

Assessing competency in a situated learning setting:
a balancing act

Reaching consensus about the standard

(K)new approaches to learning and assessment

Competency-based learning and assessment:
Starting point options

Relevance, coherence, clarity: developing
New Zealand's vocational pathways

Enhancing our capacity for competency-based learning
assessment within the Youth Guarantee Framework

Recognition of prior learning: a case study

Workplace based recognition of current competence
against national qualifications: Fonterra case study

Trades in education and the impact of technology

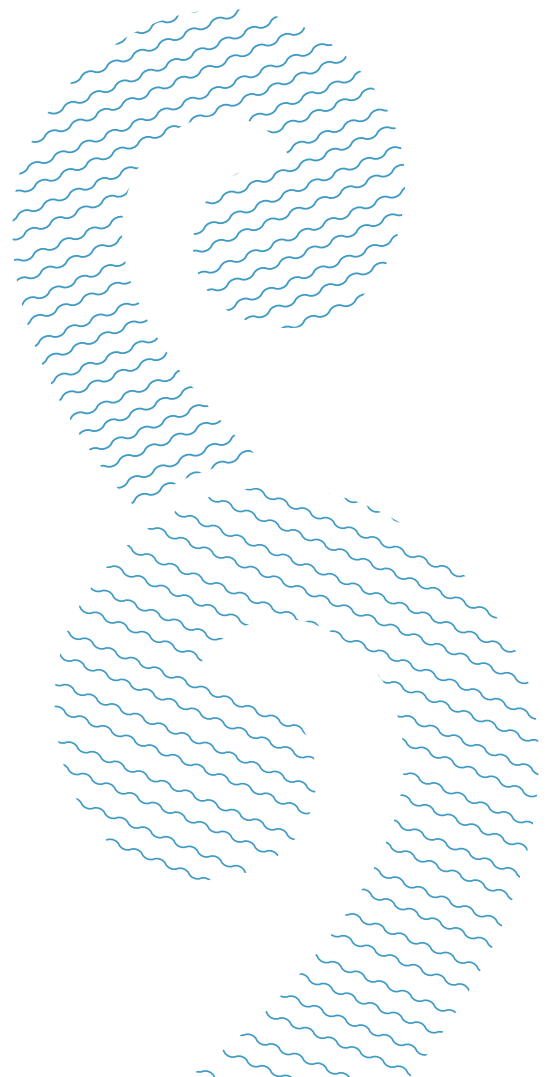
Competency-based training project: Village Court
Officials and Land Mediators: Papua New Guinea

COLLOQUIUM CONTRIBUTORS

Representatives from the organisations listed below were personally invited to attend the Colloquium. Colloquium participants contributed valuable commentary and insight around each of the presentations, further assisting Susan in her work.

- Ako Aotearoa, National Centre for Tertiary Teaching Excellence
- ARA Institute of Canterbury (formerly the Christchurch Polytechnic Institute of Technology)
- Careerforce
- Competency International Limited (CIL)
- Kompetenz
- Connexis
- Department of Corrections
- Industry Training Federation (ITF)
- Motor Industry Training Organisation (MITO)
- Ministry of Education
- Ministry of Business, Innovation and Employment (MBIE)
- Ministry of Social Development (MSD)
- NZQA
- Primary Industry Training Organisation (PITO)
- Productivity Commission
- The Skills Organisation
- Tertiary Education Commission (TEC)

The Colloquium was co-hosted by Competency International, the Industry Training Federation and Ako Aotearoa and was chaired by the Ako Aotearoa Director, Dr Peter Coolbear.



COLLOQUIUM PRESENTATIONS

ASSESSING COMPETENCY IN A SITUATED LEARNING SETTING:
A BALANCING ACT
Rod Bentham

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(K) NEW APPROACHES TO LEARNING AND ASSESSMENT
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Jenny Grainger

Full texts and Power Point presentations available at:
www.akoaootearoa.ac.nz/competency-based-learning-colloquium

ASSESSING COMPETENCY

IN A SITUATED LEARNING SETTING: A BALANCING ACT

Rod Bentham, [New Zealand Qualifications Authority](#)

A functioning 24/7 radio station was used to illustrate the concept of situational learning for this presentation. Aimed at developing the competencies required for employment in the radio broadcasting industry, on offer is a local programme in which three national qualifications are embedded. One of the challenges experienced by this learning environment was the 'un-learning journey' – from school based education to competency-based learning and assessment.

Situated learning

- Learning occurs in the same context in which it is applied
- Co-constructed within a community of practice
- Embedded in a social and physical environment
- Co-operative learning and “the zone of proximal development”

The balancing act

Competing demands between:

- The situated learning environment and learners as consumers
- Programme design and institutional QMS
- Competency-based assessment and external agency reporting requirements.

Three critical principles came out of this presentation:

By training and assessing students in the environment of a quasi-commercial radio station where learning occurs in the same context in which it will be applied:

1. Integrated assessment is possible along with the embedding of soft skills.
2. Opportunities for naturally occurring evidence are created.
3. Students vicariously learn the expectations and realities of the broadcasting industry.

Key Themes: Value to the learner; learner confidence; assessment for learning; assessment methodologies; evidence; equity; workplace relevance.

REACHING CONSENSUS

ABOUT THE STANDARD

Andrew Kear, Building and Construction Industry Training Organisation

The Building and Construction Industry Training Organisation (BCITO) is the largest provider of construction trade apprenticeships in New Zealand. Their aim is to develop and implement industry qualifications for the building and construction sector.

Using a unit standard relevant to the sector, number 13037 on the New Zealand Qualifications Framework, 'Safely Use and Maintain Carpentry Hand Tools On Site', (Level 3, 6 Credits), the presentation highlighted the tensions for learners, trainers and assessors in reaching consensus on 'the standard'. (New Zealand's adoption of a standards-based model of national qualifications dates from the 1990 Amendment to the 1989 Education Act and found its expression in the National Qualifications Framework of 1991. Today it is known as the New Zealand Qualifications Framework.)

What are "tools"?

apron, folding rule, measuring tapes, carpenter's pencil, claw hammer, nail punch set, combination square, steel square, wall board saw, coping saw, sliding bevel, chisels, planes, screwdrivers, spirit level, pinch bar (wrecking bar), plumb bob, end cutting nippers, adjustable spanner, pliers, tinsnips, hacksaw and blades, chalk line, string line, making gauge, butt gauge, sanding block, cutting knife, cramps and clamps, straight edge, pop riveter, panel saw, cross cut saw, rip saw, combination saw, socket set, dividers, drill bits, oilstone, hand drill, brace and bits.

The explanation

Hand tools are those tools which are typically used by carpenters on a daily basis.

Three critical principles came out of this presentation:

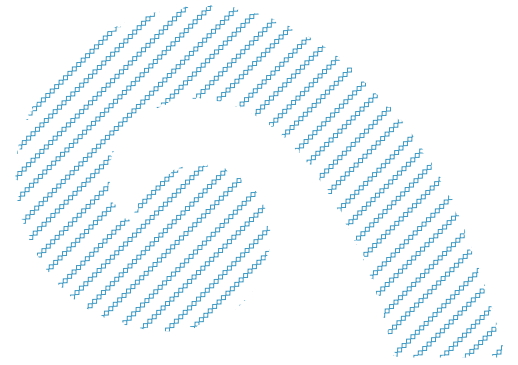
1. The standards need to be written for the sector they will be used in, rather than for those in charge of the standards, who want rules to ensure the logic, consistency and equability of each standards part.
2. Use the principles of communities of practice vs. those of social learning in writing the standards and in their assessment and moderation.
3. Businesses operating in a community of practice know what tasks such as 'pitch a roof' mean. For the purposes of establishing the level of skill in pitching a roof that the sector wants from a new graduate, describe (for example) the complexity of the roofs (e.g. *the level of complexity for roof framing must meet or exceed that required to form gables, hips and valleys*) rather than an atomistic breakdown of processes, heavy on administration, that seek to ensure the standard by investigating the tools, the systems and samples of the judgments.

Key Themes: Value to the learner; learner confidence; communities of practice; assessment methodologies; workplace relevance; evidence; equity; fairness.



(K)NEW APPROACHES TO LEARNING AND ASSESSMENT

Anthony Campabell, Te Wānanga o Aotearoa



Te Wānanga o Aotearoa is a tertiary education institution established to improve the social and economic wellbeing of those who previously had negative experiences with the secondary education system.

As a Māori-led organisation, grounded in Māori values, Te Wānanga o Aotearoa is committed to the revitalisation of Māori cultural knowledge. It is also focused on breaking inter-generational cycles of non-participation in tertiary education to reduce poverty and eliminate associated social issues. The organisation works towards 'whānau (extended family) transformation through education'.

Te Wānanga o Aotearoa is currently one of the largest public tertiary education institutions in the nation and has been promoted as the largest indigenous people's college in the world. The organisation delivers educational programmes to more than 35,000 students each year at more than 100 sites across Aotearoa New Zealand.

Our Context

- Ahuatanga and Tikanga Māori
- Whānaungatanga, Te Hiringa, Ako, Aro
- Interface between Māori and Non-Māori
- TRoQ
- Who's knowledge counts?

Vocations

- Kaiako
- Resource rich courses
- Environments
- Technology
- Progression and proficiency
- Evidence and judgement with SSBs and qualification owners.

Four critical principles came out of this presentation:

1. Te Wānanga o Aotearoa frequently use the terms (k)new and (k)now because often what they are seeing around ideas/approaches/philosophies/epistemologies which are new and gaining in momentum now, are well at home in Mātauranga (the body of knowledge that was first brought to Aotearoa by Polynesian ancestors of present day Māori) Māori.
2. Whānaungatanga (attaining and maintaining relationships) as a concept is a customary Māori practice enabling kin to strengthen relationships and ties between one another and entrench responsibilities as whānau (family). This is about building relationships for teaching and learning.
3. Assessment is for learning and not just of learning, therefore the purpose of assessment is to assist the learning process, and is most effective when it is integrated into the learning. Mastery is levels of competency demonstrated over time.
4. The contextualisation of learning and assessment is vital e.g. language and customs at Pōwhiri (a process whereby the host people welcome visitors on the marae) or Waiata (song); or through the implementation of a bicultural community contribution initiative embedded in the curriculum for the Certificate of Social Services – Biculturalism in Practice. Activities for reflection include formative assessment and capturing evidence in an authentic way. "When we think about setting standards, we think about this in a Māori context of teaching, learning, evidence and reflection."

Key Themes: Cultural values and contextualisation; assessment for learning; evidence; value to the learner; fairness; equity; workplace relevance.



COMPETENCY-BASED

LEARNING AND ASSESSMENT: STARTING POINT OPTIONS

Ben Gardiner, New Zealand Council for Educational Research

The New Zealand Council for Educational Research (NZCER) is New Zealand's independent, statutory education research and development organisation established in 1934. The NZCER Act 1972 requires the organisation to carry out and disseminate education research and provide information and advice.

NZCER conduct research and evaluation work with a range of public and private sector clients; they also produce research-based products such as tests, journals, books and services such as online testing, surveys, test marking and analysis.

This presentation looked at the needs of beginning English language learners (English Speakers of Other Languages – ESOL), particularly those new to New Zealand, and learners at foundation stages of learning to read (including both ESOL learners and learners who had grown up in New Zealand and have English as their first language). The question that was posed was: *'How do you design an on-line, interactive assessment for learners who may have little or no formal education in their home countries, let alone familiarity or confidence with technology?'*

Starting Points - Addressing the challenges

- Tablet based delivery - designed for 1-1 support by tutor/teacher
- Support videos on assessment homepage
- Limited to two question types - to help learners become familiar with question layout and how to answer
- Repeated use of icons to deliver questions.

Addressing the challenges

- Use of both male and female voices
- Ability to skip a question
- Mechanism to end the assessment early when certain conditions are met
- New 'discontinued' result.

Four critical principles came out of this presentation:

1. Learner support was provided pictorially, through the use of video or one-on-one interaction with the student's teacher/tutor vs. using written explanations and scaffolding onto touch screen technology.
2. The layout was simplified and remained consistent throughout the module; question icons were used, both of which enabled learner familiarity to occur quickly and easily.
3. Real world learning and assessment 'reality' was mirrored in the tool e.g. through the use of both male and female voices, the ability to skip a question and the option to end the assessment early once certain conditions were met.
4. A new 'discontinued result' category was added to the programme to assist with learner self-esteem and motivation to complete the programme.

Key Themes: Learner confidence; value to the learner; investment approach; assessment methodologies; assessment for learning; technology in assessment; equity.

RELEVANCE, COHERENCE, CLARITY: DEVELOPING NEW ZEALAND'S VOCATIONAL PATHWAYS

Josh Williams, Industry Training Federation

Formed in 1996, the Industry Training Federation (ITF) is the national representative body for Industry Training Organisations (ITOs) in New Zealand. It advocates for strong skills and employment policies, and systems that ensure that qualifications and training arrangements meet the needs of the workforce and contribute to a skilled and productive New Zealand.

At the crux of this presentation was the architecture of the systems that are currently in use within New Zealand. Let's think about education as an 'education to employment' journey, a meaningful journey from education to employment or education to college and then to eventual employment, successfully, because while 3 out of 10 school leavers go to university, 10 out of 10 will eventually go to work.

The specific intention behind the National Certificate of Educational Achievement (NCEA) was to open up multiple pathways through senior secondary schools and provide flexibility in how subjects (interdisciplinary subjects) could be learned beyond school pathways, not 2,000+ standards.

Employers are asking for learners who have capacity: *"Teach kids to read and write; think; solve problems, sort and evaluate information; manage their time; work with others; participate; and become good citizens"*.

A student's Record of Achievement/Lifelong Learning, managed by NZQA, doesn't create cultural capital for the learner or employers. The Record of Achievement should allow for multiple pathways and badging (micro-credentials).

Education is not just about employment...

Education is not just about getting jobs!

We teach kids to read and write; think; solve problems; sort and evaluate information; communicate; manage their time; work with others; participate; and become good citizens.

We'll do the rest.

...but employment is **always** about education.

Three critical principles came out of this presentation:

1. Employers, education providers, and youth live in parallel universes... they have fundamentally different understandings of the same situation, i.e. employers – skills; education providers – subjects; youth – credits.
2. Lessons from other countries strongly suggests that broadening the range of high quality education pathways we offer to our young people, beginning in high school, might be the single most promising strategy for increasing the percentage of young adults who earn a post-secondary degree or credential that prepares them to embark on a meaningful career.
3. Employability skills are crucial for lifelong learning and success; they are the same skills that are used to get jobs and keep jobs.

Key Themes: Value to the learner; learner confidence; workplace relevance; equity; fairness; pathways.

ENHANCING OUR CAPACITY FOR COMPETENCY-BASED LEARNING AND ASSESSMENT WITHIN THE YOUTH GUARANTEE FRAMEWORK

Virginia Archer and Adelaide Reid, **Community Colleges New Zealand**

Community Colleges New Zealand is located in six regions across the South Island of New Zealand - Nelson, Marlborough, North Canterbury, South Canterbury, Dunedin and Southland. The colleges deliver vocational education and foundation education under the Youth Guarantee and Training for Work Programmes. Their student audience have numerous personal and social barriers to learning.

THE SOLUTION = More support for tutors

Academic Manager Academic Support

- Pedagogical knowledge
- Mind-sets
- Embedded LLN/soft skills
- Lesson plans
- Resources
- Professional Development
- Work towards qualifications.

Impact

- Capacity for embedded LLN/soft skills
- Create opportunities for learning and assessment
- Environment supports CBLA
- Learning and personal needs addressed.

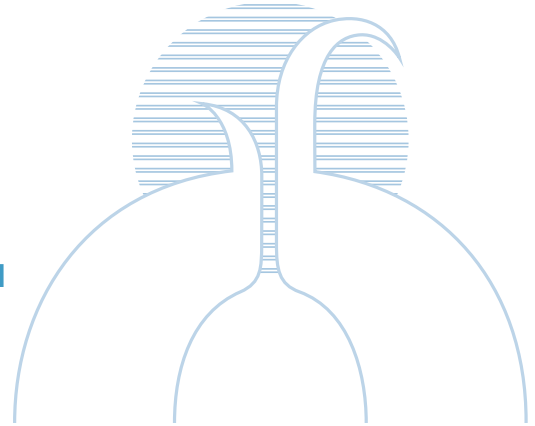
Four critical principles came out of this presentation:

1. By shifting the focus from skills to integrated learning outcomes, students had a positive learning identity and left with a qualification, feeling competent and career ready.
2. Taking an investment approach with students by embedding LLN/soft skills into assessments and addressing their personal and learning needs enabled them to feel supported throughout their learning journey.
3. Taking an investment approach with tutors enabled them to better understand good teaching and assessment and to use their new-found knowledge to better adapt to learner needs and the development of soft skills, i.e. employability skills.
4. Moving away from traditional, formal assessment environment(s) to those that create opportunities for learning and assessment and support competency-based learning and assessment, resulted in higher achievement outcomes.

Key Themes: Value to the learner; learner confidence; investment approach; assessment for learning; assessment methodologies; evidence; fairness; equity; workplace relevance; tutor and organisational capability building.

RECOGNITION OF PRIOR LEARNING: A CASE STUDY

Liz Bowen-Clewley, **Competency International Limited**



Recognition of Prior Learning (RPL) is defined by Competency International Limited (CIL) as the formal recognition of the skills and knowledge a person has regardless of how or where these skills may have been attained, that is, through formal or informal training work experience, (paid and unpaid) voluntary work and life experience.

This presentation showcased a piece of work where CIL partnered with New Zealand Post and The Skills Organisation. It illustrated that it's not about where or how a person 'learnt it' it's about whether or not they can 'do it'.

Known for their innovation in integrated assessment methodologies for workplaces, CIL designed a technique for the New Zealand Post project called 'walkabout' as the primary technique to gather evidence against the qualification. This method required New Zealand Post employees to take their assessors on a tour of their workplace and discuss their work and the actual requirements of the job.

The Assessment approach

- Walkabout (a tour of the workplace designed to allow candidates to cover the majority of evidence required).
- Some specific activities (e.g. development of personal budget and training plan supported by a resource booklet and facilitation)
- Collection of documentation (incident reports)
- Verification (from supervisor/s)

Three critical principles came out of this presentation:

1. Assessment methodologies need to be fit for purpose, fair and equitable.
2. The evidence, as long as it addresses the currency of the competencies being assessed can take multiple forms, but should have a focus on naturally occurring evidence.
3. Assessment is most effective when learners have control of collecting and presenting evidence.

Key Themes: Value to the learner; learner confidence; assessment methodologies; evidence; fairness; equity; workplace relevance.

WORKPLACE BASED

RECOGNITION OF CURRENT COMPETENCE AGAINST NATIONAL QUALIFICATIONS: FONTERRA CASE STUDY

Marilyn Brady, **Fonterra Co-operative Group** (presented by Jack Doherty)

Fonterra Co-operative Group Limited is a New Zealand multinational dairy co-operative owned by around 13,000 New Zealand farmers. The company is responsible for approximately 30% of the world's dairy exports and with revenue exceeding NZ\$19.87 billion, is New Zealand's largest company.

Wanting nationally consistent, competent operators, Fonterra engaged in the process of formally evaluating a select group of experienced employees' current competencies. Termed 'Skills Recognition Conversations', dialogue took place between individual Fonterra employees and a coach/assessor together with supporting evidence gathered from the workplace.

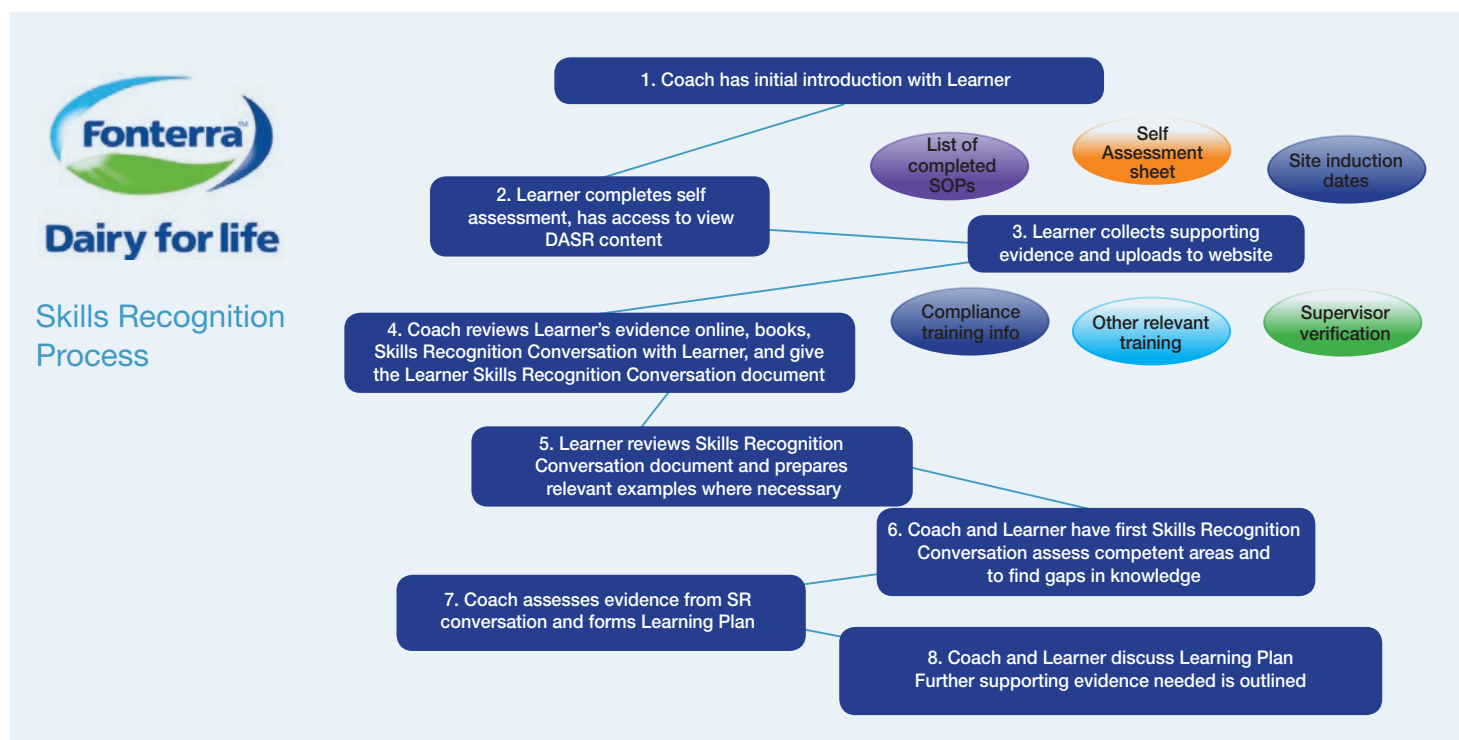
The aim was to recognise and credentialise those employees who were operating competently and consistently to the role standard required by Fonterra,

by awarding them the New Zealand Certificate in Dairy Processing Level 4. (Equally, the process was also about identifying and addressing the skill gaps of those who were not operating at the required level).

Two critical principles came out of this presentation:

1. To be deemed role competent, the New Zealand Certificate in Dairy Processing Level 4 was considered as the minimum by the business.
2. Skills recognition conversations combined with naturally occurring evidence from the workplace are valid assessment methodologies.

Key Themes: Value to the learner, learner confidence; assessment methodologies; evidence; fairness; equity; workplace relevance.



TRADES IN EDUCATION

AND THE IMPACT OF TECHNOLOGY

Kamuka Pati, **Unitec Institute of Technology**

Offering short courses, certificates, diplomas and degrees at three separate campuses in Auckland, New Zealand, this presentation focused on the changes in the institute's approach to teaching and learning in the building education area, complemented and supported by the use of technology.

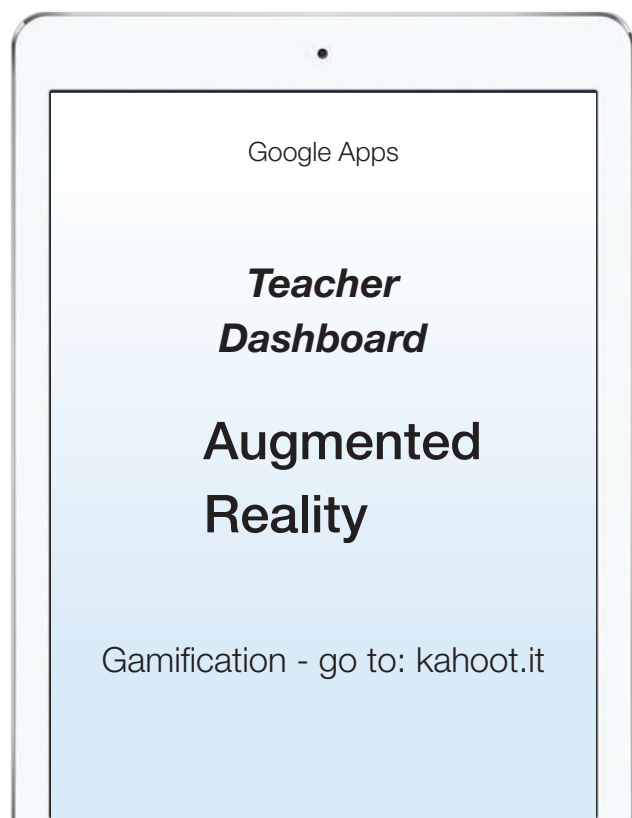
Technology is employed from both a teaching and learning perspective; e-learning community co-ordinators provide on-site learning at job sites e.g. construction sites to facilitate embedded learning; students are using augmented reality (Aurasma) and gamification (kahoot.it) to build on their knowledge base.

Teachers are using the APP Hapara, a Google APP for educators as a collaborative space for work, documents, community groups and e-portfolios.

Three critical principles came out of this presentation:

1. Technology has a wide variety of applications in the competency-based teaching and learning environment.
2. Know your audience – as high users of Google APPS, student achievement has improved as a result of employing these technological learning programmes.
3. Use tools that are fit for purpose – the technological solutions employed by Unitec to make it manageable have added value to all stakeholders – the learner, the employer and Unitec itself.

Key Themes: Technology in assessment; assessment for learning; learner confidence; assessment methodologies; evidence; workplace relevance.



Building Technology



COMPETENCY-BASED

TRAINING PROJECT: VILLAGE COURT OFFICIALS AND LAND MEDIATORS: PAPUA NEW GUINEA

Jenny Grainger, Credential Potential Limited (Competency International Limited Associate)

In a joint initiative between Competency International Limited (CIL) and Papua New Guinea – Australia Law and Justice Partnership (PALJP), CIL was asked to develop competency frameworks and competency-based training programmes and resources for the Village Court Officials and Land Mediators of Papua New Guinea.

A ‘*Day in the life of ...*’ evaluation process was used to determine what activities the Officials and Mediators did every day, what they needed to know, be able to do, and what resources they needed to perform these activities well. An upskilling programme(s) was then designed and delivered to existing trainers; trainers were then supported in the piloting of the programme(s).

Overview

Phase 1: Competency-based Framework Development

Phase 2: Competency validation and training needs analysis

Phase 3: Programme Development

Phase 4: Trainer Upskill Programme

Phase 5: Pilot and evaluation

Phase 1: Competency Framework

Day in the life of...

- What are the work activities you do on a daily, weekly, monthly basis?
- What do you have to know to do these activities well?
- What skills do you need to know to do these activities well?
- What resources do you need to do these activities well?

Three critical principles came out of this presentation:

1. Robust and well-designed competency frameworks enable high quality competency-based assessment.
2. Understanding the learner and his/her context is critical to the success of all learning and assessment activities.
3. Having the trainer qualification outcome recorded on each Official and/or Mediators New Zealand Record of Learning provided marketable identity – common currency for learners/employers and occupational confidence.

Key Themes: Cultural values and contextualisation; value to the learner; learner confidence; investment approach; workplace relevance; equity; fairness.

DISCUSSION

MAINTAINING A LEARNER FOCUS

METHODOLOGIES IN A CHANGING WORLD

SUPPORTING DIVERSITY

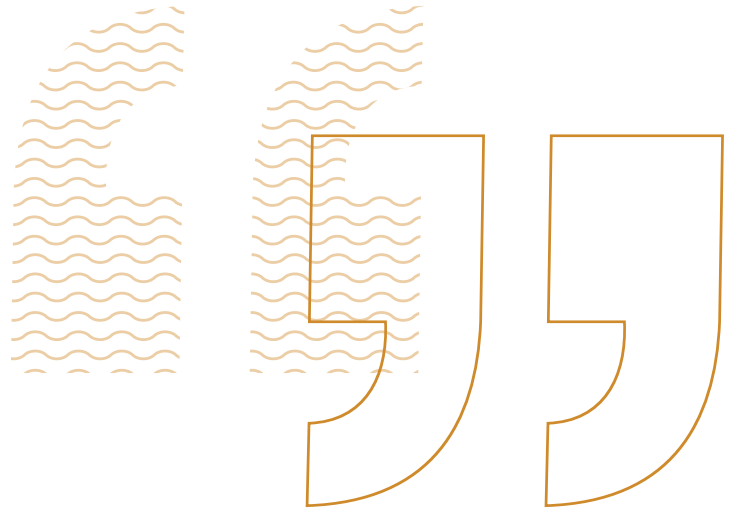
SUPPORTING PROGRESSION TO FURTHER STUDY AND EMPLOYMENT

DISSONANCE AT THE SYSTEM LEVEL

TEO CAPABILITY

RECOGNISING QUALITY

DISCUSSION



Although a very intense morning, there was time for some good discussion. This section attempts to bring out and group some of the key themes identified during the course of the presentations by Susan Patrick and other participants in the discussion sessions. The key themes are, of course, highly inter-related.

Maintaining a learner focus

Value to the learner: In the end what we do should be providing the best possible value to every learner. It is about credentialing what they have learned, however they have learned it. Assessment should support learning both in clearly identifying for each learner the next steps in their learning journey and – ideally – in supporting the learning process itself.

Learner confidence: Recognising and valuing what learners can do is critical to establishing learner confidence. Even today, the school system does this automatically for learners on an academic track, but often undermines the confidence of those students who, for many different reasons, may not fit that traditional model. Building the confidence of each learner is critical for an inclusive education system.

Methodologies in a changing world

Assessment methodologies: There are often considerable tensions around the assessment process in terms of setting standards appropriately or developing appropriate assessment tasks. We need to be careful that these are driven by the needs of the learner and a consensus understanding of the graduate outcomes we wish to achieve.

Establishing active communities of practice that include all stakeholders is critical to maintaining a consensus of understanding about what we want graduates to be able to do and to the development of the consistency of professional judgement needed in an effective system.

Workplace relevance: The importance of assessment being about the ‘things that matter’ in the workplace is critical to the value placed on a qualification by both employers and learners.

Technology in assessment: Technologies offer huge opportunities for improving assessment. At the same time technology presents risk; it makes it easier to complicate the bureaucracy around assessment, it can put the integrity of the assessment process at risk and it can provide barriers to learning (or recognition of learning) for some students.

Another issue is that some industries are changing rapidly as new technologies become part of business as usual. This means that qualifications must remain current. Close liaison with industry in setting standards is a key to mitigating this, while it was also noted that the less prescription there is in qualifications, the better the ability to future-proof. It also allows enhanced flexibility for the learner. An emerging trend is to teach technical skills as required and for qualifications to have a greater focus on employability skills.

Evidence: In the end, assessment is all about evidence about what a learner knows and can do. The quality and not the quantity of evidence is critical to good assessment.



DISCUSSION

Communities of practice: Better assessment and better professional judgements rely on active communities of practice prepared to have focused debate on what is important and relevant.

Assessment for learning: As noted above the most valuable assessment are ones that support continuing learning.

Supporting diversity

Cultural values and contextualisation: Overt consideration of the cultural values of the learners and the organisation is fundamental to learner-centred assessment.

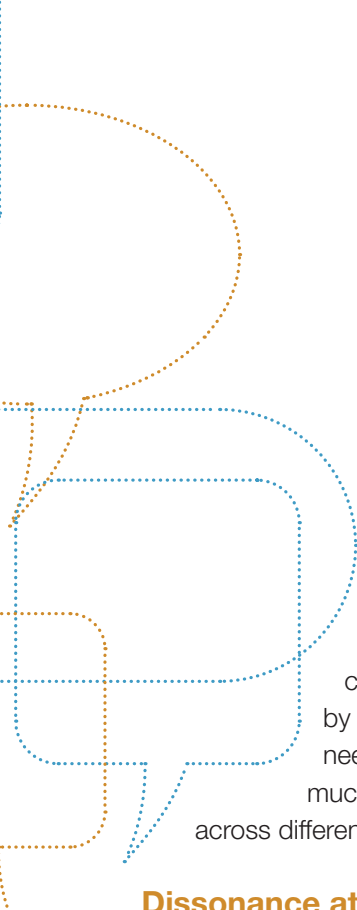
Equity: Assessment strategies and approaches need to address issues of cultural diversity and socio-economic and/or gender disadvantage. In a Wānanga context this means being explicitly aligned to cultural values and context; in the case of ESOL for migrants, care must be taken to ensure assessments are culturally neutral. In many contexts, it means being deliberately inclusive by the use of examples relevant to different cultures or providing gender and age role-modelling. In some cases, it means deliberately trying to change workplace or provider norms about what is acceptable and what is valued.

Fairness: Often paired with equity, fairness has a broader meaning in that assessment must be fair and not favour individual learners. It goes to matters of integrity and consistency across different providers and assessors; it goes also to constructive alignment between what is being assessed and what is being learned. Ultimately it goes to the reputation and value of the credential earned.

Supporting progression to further study and employment

Pathways: However great our assessment processes are, if they don't support the learning and employment progression of each learner, they achieve little.

A key feature of effective pathways is that they allow learners to define purpose for themselves. They need to be flexible so learners are not unduly locked into programmes of study and unable to change direction without penalty. The importance of assisting learners to make clear, well informed choices is critical. In an uncertain future employment market, each learner needs to be supported to develop what Careers NZ calls "marketable identity".



Student records of achievement: There was a clear consensus that these are owned by the student and that such records need to be learner centred and provide much better ability to bridge/pathway across different parts of the system.

Dissonance at the system level

Outcomes focussed: It is unclear at present whether the outcomes focus of TRoQ is becoming a reality. There are some concerns that parts of the bureaucracy have yet to catch up with the aspirations of the policy.

Investment approach: There are dissonances between current funding approaches and the principles of the new qualifications framework. The present system tends to invest in inputs, assessment tends to credential outputs, but what we really want is to invest (both in terms of funding and effort) in outcomes for learners. The present funding regime has not yet adjusted to the new qualifications model.

Similarly, funding approaches need to clearly distinguish between funding for recognition of learning and funding for supporting learning. Both add value for the learner and employer; both carry costs.

System architecture: Several participants commented that New Zealand needs a more coherent policy view in this space. This view needs to address the practicalities of implementation.

TEO Capability

Tutor and organisational capability: Good assessment is difficult in theory and even harder in practice. We need strategic allocation of resources into building our assessment capability, at tutor / assessor level, at organisational level and at system level.

Recognising Quality

What is quality? So the final question is how do we identify quality competency-based assessment and learning? It comes down to a question of value to the learner, future employers and other stakeholders. Best practice for assessment sits in a tripartite relationship between the learner, the assessor and industry experts.

The assessor is the facilitator of the process. The discussion reinforced the importance of assessor training and support mechanisms which foster communities of practice and consistency management. This needs to be framed within a better systems architecture.

AFTERWORD:

NOTES FROM SUSAN PATRICK

CONCLUSION

LIST OF PARTICIPANTS

AFTERWORD:

NOTES FROM SUSAN PATRICK



New Zealand has been exploring future directions in competency-based learning and assessment for decades. The movement is grounded in social justice and equity. The principles of good practice that are the focus of the conversation today highlight that assessing competency in a situated learning setting is a balancing act between activities of social learning via communities of practice and holding all students to the same high standards. These standards need to be articulated outcomes describing what a student knows and can do.

An important focus in New Zealand is the research underpinning competency-based learning on how students learn best. Learning highlights skills that are transferable. Learning is situated and, ideally, occurs in the same context in which it is applied. Learning is co-constructed in communities of practice. Learning is co-operative and in a learner's Zone of Proximal Development. Students work on mastery toward skills to be competent and there is an emphasis on peer-to-peer and social learning that empowers student agency.

There is increasing interest in competency-based learning with an integrated approach to assessing learning. Sufficiency, timing and methods of assessment are examined in competency-based systems. Assessments should be a meaningful part of the learning process and students (as well as assessors) are aware of exemplary work as a guide. In some cases, this student-centred focus extends to learners having control over how they are assessed (on set standards).

Future directions in competency-based education will become more integrated in approaches to learning that move away from subject or course "containers" and make a shift to learning across subjects on relevant issues, projects and problems – away from standards-based on course units toward simply addressing standards-based competencies across domains.

Competency-based assessment is often restricted by agency reporting requirements that can serve as a barrier at odds with achieving and credentialing student-centered learning within relevant active, situated, integrated learning experiences that provide deeper learning of knowledge, skills and dispositions.

The move toward competency-based learning started forty years ago. It was a move away from norm-referenced to criterion-referenced. Why? To improve transparency of the learner and what they know and can do. To provide clarity on a learner profile of student achievement over time, including through portfolios of student evidence of demonstrated competence. And, to provide equity and drive equity in the education system: moving the assessment process away from a filtering and selection device to one that recognises what each individual student can do and what the next steps might be for them.

CONCLUSION



As more integrated and embedded approaches to competency-based assessment are embraced, both challenges and barriers lie ahead in the New Zealand CBLA landscape.

Two significant barriers would appear to be resistance to change (right across the diverse parts of the sector), and the systems architecture needed to support and facilitate the necessary flexibility in individual learner journeys from education to employment. Complicating this picture, but offering significant opportunities in many cases, is the pace of technological advancement.

Challenges are present across a number of areas. From a competencies perspective, we need to find a way to express skills and abilities that makes sense to everyone. There is also consensus that there is a need for a core base of transferable skills, employability skills, for there to be value for the learner and workplace relevance.

With respect to assessment, what does good practice assessment look like moving forward? Assessor training will be impacted, as will the consistency of assessor judgements; requiring greater flexibility around how those judgements are made, with improved support mechanisms required for vocational assessors.

Quality management will also attract its fair share of challenges, from management processes, to assurance, moderation to result reporting, as well as sufficiency of evidence determinations.

At the very core are the notions of fairness and equity: in the end, assessment should be designed to support learning for every individual in Aotearoa, New Zealand's increasingly diverse society.

LIST OF PARTICIPANTS

TITLE	NAME	REPRESENTING
Chair	Peter Coolbear	Ako Aotearoa
Eisenhower Fellow	Susan Patrick	
Presenters	Virginia Archer	Community Colleges NZ
	Rod Bentham	NZQA
	Liz Bowen-Clewley	CIL
	Marilyn Brady*	Fonterra
	Anthony Campbell	Te Wānanga o Aotearoa
	Ben Gardiner	NZCER
	Jenny Grainger	Credential Potential Limited
	Andrew Kear	BCITO
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	Adelaide Reid	Community Colleges NZ
	Josh Williams	ITF
	<i>*unable to attend, but presentation provided.</i>	
Attendees	Rowena Brown	MSD
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