

CHOOSING THE RIGHT ASSESSMENT METHOD

This worksheet helps you choose an assessment method that aligns with your goals, objectives, or learning outcomes; the type of information you need; and how the results will be used. It offers two routes for selecting a method, one based on learning outcomes, and one based on objectives, so you can identify which tools will provide meaningful, actionable, and practical evidence for your program or service. Programs may follow the route that best fits their assessment needs.

Restate Your Goal

Use this section to identify the broad purpose the program or service is trying to accomplish. The goal helps connect learning outcomes, objectives, and assessment decisions.

Goal: _____

Route A: Learning Outcomes

Step A1: Restate Your Outcomes

Learning outcomes define the learning or change you expect and clarify the evidence needed to assess success. Identify criteria for each outcome. What does meeting the outcome entail or look like?

Outcome #1: _____

Criteria: _____

Outcome #2: _____

Criteria: _____

Outcome #3: _____

Criteria: _____

Step A2: Identify What You Want to Learn

Use this section to describe what kind of evidence will show whether the learning outcome has been met. State what you expect learners to demonstrate.

What knowledge, skill, behavior, or change are you trying to measure?

What evidence will demonstrate that the outcome was met?

Step A3: Match the Outcome to Possible Methods

Use this section to connect the type of learning described in your outcome to the methods that best capture it. This helps ensure you select a tool that fits the nature of the outcome.

If you want to assess...

Thinking or performance skills → Assignments, prompts, rubrics

Knowledge or conceptual understanding → Quizzes, tests, problem-solving tasks, Classroom Assessment Techniques (CATs)

Attitudes, beliefs, values, dispositions → Surveys, focus groups, reflective writing, interviews, debriefs

Overall or if long-term learning → Portfolios, cumulative projects

Benchmarking/comparisons against other institutions → Published surveys or standardized tools

What method(s) might work best for each of your learning outcomes?

Outcome #1 method(s): _____

Outcome #2 method(s): _____

Outcome #3 method(s): _____

Route B: Objectives

Step B1: Restate Your Objectives

Use this section to restate the specific results you intend to achieve. Stating objectives clearly helps identify the type of information you need.

Objective #1: _____

Objective #2: _____

Objective #3: _____

Step B2: Identify What the Objective is Intended to Show

Use this section to clarify what the objective reflects. Determining whether it describes participation, completion, a process, or a skill helps guide the assessment method you will choose.

What do you want to learn from this objective?

Step B3: Match the Objective to Possible Methods

Use this section to choose a method that aligns with the type of objective you are assessing. This ensures that the evidence you collect matches the intent of the objective.

If you want to assess...

Completion or participation → logs, sign-ins, or checklists

Skill demonstration → rubrics or observations

Process or behavior change → surveys, interviews, or focus groups

Quality of implementation → observations, document review, post-event debriefing

What method(s) might work best for each of your objectives?

Objective #1 method(s): _____

Objective #2 method(s): _____

Objective #3 method(s): _____

Routes A & B: Shared Steps

Step 4: Method Strengths and Practical Considerations

Think about how you will use the information and what types of evidence your stakeholders find meaningful. Identifying who is going to be using the information and what will be meaningful and useful to them should guide assessment method selection

Consider:

What types of data will be most meaningful for decision-makers?

What kinds of data will your audience respond well to?

How much time and capacity do you have?

Can the method be embedded naturally within the program?

Step 5: Direct vs. Indirect Measures

Choose whether you need direct evidence (measuring actual performance/learning) or indirect evidence (perceptions of performance/learning).

Direct (shows performance/learning): rubrics, observations, projects, presentations, portfolios

Indirect (reflects on performance/learning): surveys, focus groups, interviews, reflections

For each outcome or objective, decide what type of evidence is most appropriate:

Outcome/Objective #1: Direct / Indirect / Both

Explanation: _____

Outcome/Objective #2: Direct / Indirect / Both

Explanation: _____

Outcome/Objective #3: Direct / Indirect / Both

Explanation: _____

Step 6: Formative vs. Summative Approaches

Decide whether you need ongoing, developmental information (formative) or end-of-program evaluation (summative).

Outcome/Objective #1 will be assessed formatively / summatively because...

Outcome/Objective #2 will be assessed formatively / summatively because...

Outcome/Objective #3 will be assessed formatively / summatively because...

Step 7: Embedded Assessment Opportunities

Embedded or naturally occurring assessment moments can occur during existing interactions, assignments, reflections, or program activities. These opportunities are often more meaningful and yield better response rates. Essentially, the aim is to “strike while the iron is hot.”

Brainstorm opportunities for embedding assessment into a program or service. How could you better capitalize on information participants may already be providing? How can you ‘strike while the iron is hot’?

Next Steps: Planning for Implementation

Once you have selected your method(s), outline the practical steps needed to implement them successfully. Consider timeline, data collection process, instruments, and any additional support needed.

What steps will you need to take to implement this method/these methods? What questions do you still have?
