Informal assessment: The basics

by Lori A. Forlizzi

Informal assessment is an important part of instruction. Informal assessments can be closely related to students’ and instructors’ goals and needs and can answer the questions “How are we doing?” and “What do we work on now?” This article will address how ABLE staff can use informal assessments in their work. It has two Fieldnotes companion articles: “Adult learner assessment for ABLE reporting: Its role in the equation” and “Some frequently asked questions about adult learner assessments (and some answers),” both also by Dr. Forlizzi.

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Marjorie works with a class of adult beginning ESL learners. They are working on functional speaking and listening skills in a variety of areas, including health, their children’s schooling, and employment. Marjorie follows a plan during each session that covers new material, demonstrates it for the class, then has the students practice new language skills with each other. She does this through role-plays in which the students have to use the new language skills. Today, students are working on calling their boss or child’s school to report time off for an illness. Students are paired, one taking the role of caller and the other taking the role of call recipient. The pairs are given various scenarios (child has a fever, parent has the flu) and are asked to make calls using the new language skills. While students are working, Marjorie walks around the room, noting how individual students are doing in their mastery of the target skills. She records these observations and uses the information to plan any additional needed work on the target skills.

Karen has been working with a small group of ABE learners. They are working on developing good reading comprehension skills in preparation for GED study. Karen demonstrated a think-aloud reading technique for her learners and allowed them to practice it. Now she asks individual students to think aloud as they read some paragraphs, telling her what they are thinking and doing as they read. This gives Karen a “window” into the comprehension strategies her students are (or are not) using. She uses this information to plan a unit on reading comprehension strategies. She plans to use the think-aloud technique again to assess her students’ learning after the unit is complete.

Kevin works with job-seeking adult learners. Kevin understands the importance of teamwork in the new jobs his students will be competing for. He and his students will work in groups on project-based tasks similar to ones they will find in workplaces (e.g., fund-raising activities, planning a banquet within a certain budget, and gathering information on a topic and developing and presenting a report on it). They discuss teamwork competencies and what poor, good, or excellent performance on each competency would look like. Before beginning the unit on teamwork, students work in groups on some small projects. Kevin uses these projects as opportunities to assess individual students’ teamwork skills. To do this, he uses a rubric he has developed from the class discussions on good teamwork. He will use the assessment results to plan instructional and practice activities on teamwork. He plans to reassess his students again using the rubric to gauge progress after they’ve done some work on teamwork skills.

Informal assessment is an important part of instruction. As mentioned in the accompanying article, “Adult learner assessment for ABLE reporting: Its role in the equation,” and as demonstrated in the above examples, informal assessments can be closely related to students’ goals and needs. They can assist instructional staff with frequent checking on and guidance of instructional goals and activities: that is, answering the questions “How are we doing?”
Informal assessment: The basics and “What do we work on now?”

Would you like to assess learning goals that are not measured by ABLE-approved standardized assessments—or assess goals that are measured by those assessments more frequently? If so, informal assessment is for you. This article will address how ABLE staff can use informal assessment in their work.

Selecting informal assessments

The first step is defining what you would like to assess. What would you like students to know or to be able to do? Once you can answer that, you can think about the form that the assessment might take. Numerous published and teacher-made informal assessments are available. Because they are informal, they may be reviewed and adopted as is or adapted to meet your needs. Another route is to develop your own informal assessment.

The following suggestions can help you in selecting informal assessments for use as is or for adaptation.

- Ask other instructors in your program to share what they are doing with informal assessments. This can be a good activity for a staff meeting or staff development event. There may be something existing that you’d like to adopt or adapt. Or, you may find that a colleague has an assessment that will get information that is useful to you and is willing to share those results.
- Publishers’ catalogs and conferences are good sources for new or unfamiliar published informal assessments.
- Published instructional materials often include informal assessments keyed to lessons or units (i.e., curriculum-based assessments) that you might find useful.

Here are some useful questions to ask when reviewing informal assessments for possible adoption or adaptation:

- What is tested by the instrument?
- What are the target populations/levels of ability for which the instrument is appropriate?
- What materials are needed to administer the assessment?
- Are the administration directions clear and easy to follow?
- Are procedures for scoring and interpretation clear and easy to follow?
- How would the results be used to help plan instruction?
- What kind of training is needed to use the instrument?
- What are the costs of obtaining/using the instrument?
- Could the instrument be easily adapted to our needs?

Developing informal assessments

- First, assessment strategies should be planned when instruction activities are planned. Don’t wait to tack on assessment as an afterthought.
- Second, make sure you have identified a clear purpose for the assessment. What are the goals of instruction? What student outcome would you like to see?
- Third, define the tasks or situation you will utilize to form the basis of the assessment process.
- Fourth, decide how you will evaluate the student’s performance in the situation or on the task(s). What will constitute outstanding performance? Good performance? Acceptable performance? Less than acceptable performance?
• Finally, develop the assessment materials and procedures.

Here are two examples to illustrate these steps, with the steps noted in parentheses within each example.

Joe has learned through standardized assessment and observation of his students that they all need help with long division problems. He plans to work with them on steps and rationale for long division, but his goal is ultimately to have students be able to answer problems correctly (purpose for assessment). He decides to develop a summative worksheet (basis for assessment) for the end of the unit. The worksheet will have 10 long division problems on it. Joe decides that students who obtain 80–100 percent correct will have demonstrated good or acceptable performance—they are ready to focus elsewhere. Those who score less than 80 percent are in need of more work with long division (evaluation criteria). Joe is now ready to design and implement the worksheet (develop materials and procedures).

Wilma is working one-on-one with Sue, the mother of a third-grader. Sue would like to be more involved with her daughter Emily’s school, but having had bad experiences with school herself, Sue is nervous about entering the building and conversing with school personnel, including her daughter’s teacher and principal. Wilma and Sue decide that they will work on Sue’s ability to communicate with the teacher (purpose for assessment). Wilma and Sue decide that some role-plays with Wilma playing the role of Emily’s teacher and Sue playing herself (basis for assessment) would provide some rich contexts for pre- and post-assessments of Sue’s communication skills. Together, Wilma and Sue brainstorm some dimensions that are important to Sue for good communication. These include eye contact, lack of fidgeting, smiling, the ability to listen and respond to the teacher’s comments, and the ability to ask appropriate questions. For each dimension, Wilma helps Sue define what would constitute “excellent” (above expected), “good” (not a needed focus now) and “poor” (needs some more work) performance. For example, on the fidgeting dimension, they decide that a mark of “excellent” will be awarded for no fidgeting (Sue can sit calmly for the entire meeting with her hands in her lap); “good” will be awarded for less than five instances of fidgeting (such as pulling on hair or putting her hand to her face) during the meeting; and “poor/needs work” will be given for five or more instances of fidgeting (evaluation criteria). Wilma is now prepared to develop the assessment materials and procedures. From talking to Sue, she knows that a typical meeting with Emily’s teacher involves an update on how Emily is doing and a time for Sue to ask questions or bring up concerns. Wilma also knows a report card is about to be issued. She asks Sue to bring a copy of one of Emily’s old report cards to use in the assessment process. Wilma also develops a note that gives some tips for how parents can support their children’s learning at home. She will use these materials during the role-play that will form the basis for a pre-assessment (develop materials and procedures). Wilma and Sue role-play the meeting using the materials and Wilma scores Sue’s performance on the designated dimensions using the rubric. Wilma uses the results to plan instruction. She also begins to develop additional materials to use in a post-test role-play.

These scenarios provide just two examples of how informal assessments can enrich instruction by helping students and teachers define progress toward specific, meaningful goals. The steps to beginning this are relatively simple and provide a great payoff for students and instructors.