

Module 3: Evaluation and Learning Assessment

Lesson 01: Assessing and Evaluating the Training Process

GIZ sub-project:

MANILA - Modern Approach to Nursing Instructional Learning Advancement

Development and implementation of a blended learning qualification for instructors for nursing practice in the Philippines

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1. Learning Objectives

- **Ability to carry out structured assessments:**
You should be able to create clear and understandable assessments that effectively support the learning process.
- **Differentiation between formative and summative assessment:**
The aim is to understand and apply the differences, possible uses and objectives of both forms of assessment.
- **Encourage self-reflection and personal responsibility:**
You should learn to critically evaluate your own learning process and take responsibility for your further education.
- **Ensuring the quality of care through targeted learning assessment:**
The aim is to systematically record your current level of knowledge and skills and to plan individual support measures on this basis.

2. What is the Purpose of Assessment in the Training Context?

Assessment in the training context primarily serves to review and support the learning process. It is an integral part of any training programme, as it gives learners feedback on their level of knowledge and skills, provides teachers with insights into the success of their teaching methods and thus ensures the quality of the training. Assessment is particularly important in nursing practice, as training not only covers theoretical knowledge, but also practical skills and social competences that are essential for practising the profession.

2.1. Appraisals have Several Essential Functions:

1. Make learning progress visible:

The assessment shows how far the learner has come in the training process. It documents the current level of competence development in terms of theoretical knowledge, practical skills and social skills.

2. Promote motivation:

Positive feedback and constructive criticism motivate learners. If learners know that their performance is regularly assessed, this can increase their incentive to improve their skills.

3. Identify learning difficulties:

Regular assessments allow problems and deficits to be recognised at an early stage. This makes it possible to take individualised support measures in good time in order to provide learners with targeted support.

4. Create transparency:

Assessments provide clarity with regard to the training objectives. Learners know what they need to work on and what skills are expected of them. This creates a clear structure and orientation in the learning process.

5. Quality assurance of training:

The assessment ensures that certain standards are met and that the training is of a high standard. This is particularly important in nursing practice, as the quality of training has a direct impact on the quality of care and patient safety.

6. Decision-making basis for finalisation and certification:

At the end of an apprenticeship, the assessment is also used to decide whether a learner has acquired the necessary skills to enter the profession. It forms the basis for certificates, examinations and certifications.

2.2. Aims and Functions of the Learning Assessment in Nursing Practice

The learning assessment is a specific part of the assessment process and aims to determine the trainee's current level of knowledge and skills. This is usually done through targeted observation, examinations or practical work in everyday nursing practice. In nursing practice, the learning assessment has several important objectives and functions:

1. Determination of the individual competence level:

In nursing, it is important that trainees not only have theoretical knowledge, but are also able to work safely and competently in practice. The learning assessment helps to determine the current level of the trainee's competences. This includes:

1. **Theoretical knowledge:** Recognising whether the learner has mastered the basic nursing principles and specialist knowledge.
2. **Practical skills:** Checking whether the learner is able to carry out care activities correctly, safely and independently.
3. **Social skills:** Assess interpersonal skills, such as empathy, communication and teamwork skills, which are particularly important in nursing.

2. Support for individual learning development:

A central aim of the learning status survey is to control the learning process individually. By recording the current learning status, the practical instructor can respond to the individual needs of the learner.

Examples:

- Learners with deficits can receive targeted support and learning opportunities.

- Learners with advanced "knowledge and skills" can be supported with more challenging tasks.

3. Ensuring the quality of care:

Nursing practice requires a high level of care and competence as carers work directly with people's health and well-being. The learning assessment ensures that learners acquire the necessary knowledge and skills to provide high quality and safe care. In this way, the learning assessment also helps to protect patients by ensuring that only qualified carers undertake their tasks.

4. Reviewing the progress of training in practice:

In nursing practice, the learning status survey is used to evaluate progress in the practical part of training. It serves to answer the question: How far is the trainee already on the path to full professional competence? It checks whether the trainee has reached the milestones defined in the training plan.

5. Adaptation of training methods:

For practical instructors, the learning status survey also offers an opportunity to reflect on and adapt their own teaching methods. If many learners have difficulties in certain areas, this can be an indication that the teaching or guidance needs to be improved. In this way, practical instructors can also use the results of the learning assessment to optimise their own work.

6. Preparation for examinations and certifications:

The learning assessment gives learners an overview of how well they are prepared for final examinations and practical assessments. It serves as an intermediate step to recognise and remedy weaknesses in good time before the final assessment takes place.

7. Promotion of reflection and personal responsibility:

The ability to self-reflect plays a central role in modern nursing training. The learning status survey is intended to encourage trainees to reflect on their own learning process and take responsibility for their further training. Through targeted feedback, trainees learn to better assess their strengths and weaknesses and proactively work on their further development.

Summary

Assessment in the training context and the assessment of learning progress in nursing practice are key tools for ensuring the quality of training, visualising learning progress and promoting the development of trainees in a targeted manner. They are not only used to test knowledge and skills, but also to provide individualised learning support, ensure the quality of nursing care and prepare

for examinations. They also promote trainees' personal responsibility through regular feedback and reflection and create a transparent and fair learning environment.

3. Formative Versus Summative Assessment

Formative and summative assessment are two different approaches to evaluating the learning progress and competences of trainees in a training context. Both have specific objectives, timing and methods that can complement each other. In nursing practice, where both theoretical knowledge and practical skills play a role, an understanding of both forms of assessment is essential.

3.1. Formative Assessment

Formative assessment is used to continuously monitor and support the trainees' learning process. It takes place throughout the entire training process and aims to provide learners with regular feedback so that they can continuously improve their performance. The focus is on promoting learning development rather than making a final judgement on overall performance.

Objectives of formative assessment:

- **Learning support:** Formative assessment is intended to accompany and support learners on their journey through training. It is designed to document progress and, if necessary, offer timely assistance if learning difficulties arise.
- **Feedback:** Continuous feedback is a central element of formative assessment. Learners receive regular feedback on their strengths and weaknesses, which helps them to adjust their performance and work on targeted improvements.
- **Encouraging self-reflection:** Formative assessment should encourage learners to reflect on their own learning process. They should learn to assess their own progress and take responsibility for their development.
- **Adaptation of teaching:** For teachers and practice instructors, formative assessment provides important information about how effective their teaching methods are. If certain content or skills are not understood by many learners, they can adapt their teaching accordingly.

Methods of formative assessment:

- **Observation in everyday practice:** In nursing practice, formative assessment is often carried out by observing nursing activities. Practice supervisors provide direct feedback on the correct execution of nursing activities or communication with patients.
- **Regular feedback meetings:** Short, informal discussions or structured reflection meetings after certain care activities are important elements of formative assessment. They offer the opportunity to provide direct feedback and point out areas for improvement.
- **Intermediate tests or exercises:** Theoretical learning content can be tested through regular tests or quizzes. These help learners to assess their level of knowledge and prepare for larger examinations.
- **Self-reflection and peer feedback:** Formative assessment can also take place through self-assessment by learners or feedback from colleagues (peer feedback). In nursing practice, this can be done by reflecting on nursing experiences or obtaining feedback from other learners.

Advantages of formative assessment:

- **Learning process-orientated:** It promotes continuous learning and the further development of learners, instead of focussing solely on the end result.
- **Individualised support:** Learners receive targeted support based on their individual learning needs and progress.
- **Reduction of exam stress:** As formative assessments are not conclusive in nature but serve to develop learning, they are often under less pressure. This can reduce stress for learners and create a more positive learning environment.

Examples:

Here are four practical examples of formative assessment to help learners better understand the concept and benefits of this form of assessment:

Example 1: Feedback after a practical exercise

Situation: A trainee performs the mobilisation of a patient in bed under supervision.

Procedure:

- 1 The practical instructor observes the trainee during the exercise, takes notes and gives brief feedback immediately after the exercise.
- 2 She emphasises what was done well, e.g: "You handled the communication with the patient very well and used the right grip."
- 3 She points out areas for improvement, e.g: "Next time, you could adjust the bed position a little better so that the patient is more comfortable."
- 4 The practice instructor suggests repeating the exercise in order to realise the improvements.

Objective: The trainee receives concrete tips for improvement before the activity is formally assessed.

Example 2: Learning diary with reflection

Situation: The learners keep a learning diary in which they document their experiences, challenges and successes on a daily or weekly basis.

Procedure:

- 1 The practice supervisor reads the learning diary regularly and provides feedback, e.g. through written comments or a reflection discussion.
- 2 One comment could be: "You have described very well how you have mastered patient communication. Have you also thought about how you could respond to difficult questions?"
- 3 Feedback is used to encourage learners to think more deeply about their experiences and to learn from them.

Objective: Formative assessment supports self-reflection and promotes continuous development.

Example 3: Case discussion with specific questions

Situation: The trainees are to conduct a case discussion on a care case and explain their analysis and planned procedure.

Procedure:

- 1 After the presentation, the practice instructor asks specific questions: "How would you improve communication with this patient?" or "What alternative care measures could be considered?"
- 2 The practice instructor gives immediate feedback, e.g: "You have given good reasons for the care measures. Perhaps next time you could include possible risks to a greater extent."
- 3 No grades are awarded, but the discussion serves to further develop analytical skills.

Objective: Learners reflect on their decisions and further develop their problem-solving skills.

Example 4: Simulation of an emergency situation

Situation: In a simulation, the trainees practise how to react to a sudden circulatory arrest.

Procedure:

- 1 The practical instructor observes the learners during the simulation and analyses the procedure.
- 2 The practice instructor then gives structured feedback: "Your team worked well together and the chest compressions were performed correctly. One improvement would be for you to take on more of a team leadership role."
- 3 The learners have the opportunity to run the simulation again and implement the suggestions for improvement.

Objective: The learners improve their practical skills and teamwork in a protected environment.

Conclusion:

Formative assessments such as these examples are designed to support the learning process, recognise errors at an early stage and facilitate improvements through constructive feedback. They strengthen learners' confidence in their abilities and optimally prepare them for formal assessments or practical examinations

3.2. Summative Assessment

Summative assessment, on the other hand, takes place at the end of a learning process and aims to evaluate the overall performance of the trainee. It focuses on whether the learners have achieved the training objectives and are able to put the necessary skills and knowledge into practice. A final judgement is made about the competence of the learner.

Objectives of the summative assessment:

- **Performance assessment:** The summative assessment serves to evaluate the entire training process or a section of it. It provides a final assessment of the learning success and determines whether the learner has achieved the defined objectives.
- **Confirmation of qualification:** In nursing practice, summative assessment is used to ensure that the learner has acquired the necessary skills to work as a competent carer. It often forms the basis for certificates, diplomas or professional qualifications.
- **Comparison and standardisation:** Summative assessments are often standardised so that learners' achievements can be compared with each other. This is particularly important in vocational qualifications where recognition of a qualification is at stake.

Methods of summative assessment:

- **Examinations:** Theoretical knowledge is tested in written or oral examinations. This can take the form of multiple-choice tests, open questions or case studies.
- **Practical examinations:** In nursing practice, practical examinations are a central component of the summative assessment. Trainees must demonstrate their skills in real or simulated nursing situations. This can include the correct execution of nursing actions or communication with patients.
- **Final reports or case studies:** Learners can also be assessed summatively through written work, such as analysing case studies or creating care plans.

Advantages of summative assessment:

- **Final assessment:** It enables a clear, objective assessment of learning achievements, which serves as the basis for degrees or certificates.
- **Traceability:** Summative assessments provide a clear and definitive statement as to whether the learner has achieved the training objectives.
- **Promoting standardisation:** As summative assessments are often standardised, they contribute to the comparability of performance, which is particularly important in vocational qualifications.

Comparison between formative and summative assessment

Aspect	Formative assessment	Summative assessment
Timing	During the entire learning process	At the end of a learning phase or training process
Objective	Support and promotion of the learning process	Final evaluation of performance
Focus	Feedback for continuous improvement	Overall assessment and achievement of training objectives
Feedback	Regular feedback on learning development	Often only one-off feedback
Valuation basis	Process-orientated: Development and progress	Results-orientated: Final competences
Pressure on learners	Low, as no final judgement	High, as it often determines the conclusion
Examples	Interim reviews, feedback meetings, reflection meetings	Final examinations, practical examinations, certification examinations

3.3. Integration of both approaches in nursing practice

In nursing training, formative and summative assessments should be used in a complementary way. Formative assessments offer the opportunity to guide the learning process and respond to the

individual needs of learners, while summative assessments ensure that learners have acquired the necessary skills and knowledge at the end of their training.

- **Formative assessment:** During practical training in nursing, the practice supervisor could conduct regular feedback sessions and observe nursing actions in order to provide continuous support to the trainee.
- **Summative assessment:** At the end of the training programme, a final examination or practical performance review is carried out to determine whether the learner is ready to work independently as a carer.

The combination of these two approaches ensures that the trainees are supported and encouraged throughout their training and at the same time have acquired the necessary skills at the end to be successful in nursing practice.

4. Self-assessment and External Assessment in Nursing Training

Self-assessment and external assessment are key instruments in the training of nursing staff. Both methods are used to comprehensively assess the learning development and performance of trainees by incorporating different perspectives on the learning process. While external assessment is primarily carried out by practice instructors, the focus of self-assessment is on the trainees' own reflection of their own abilities and performance.

4.1. Self-assessment

Self-assessment encourages trainees to critically reflect on their own skills, progress and learning needs. It not only promotes personal responsibility, but also awareness of personal strengths and weaknesses.

Objectives of the self-assessment:

a. Promotion of the ability to reflect:

Self-assessment encourages learners to critically scrutinise their actions, decisions and their effects.

b. Train self-awareness:

Learners should develop a realistic picture of their own competences by identifying their strengths and weaknesses.

c. Strengthen personal responsibility:

Through self-assessment, learners take responsibility for their learning process and consciously engage with the training objectives.

d. Promote motivation:

When learners recognise their own progress, they feel motivated to continue working towards their goals.

Methods of self-assessment:

- Reflection sheets or diaries:

Trainees regularly write down their experiences, observations and findings. This can be done after a working day or a specific care activity, for example.

- Self-assessment forms:

Structured questionnaires help learners to evaluate their performance in specific areas. This can range from the performance of a nursing action to communication with patients.

- Self-reflection discussions:

In discussions with the practice supervisor, the trainees reflect on their perception of challenges, successes and opportunities for improvement.

Advantages of self-assessment:

- Self-assessment promotes critical thinking and the ability to learn from mistakes.
- Helps learners to set realistic goals.
- Supports the development of independence and professional maturity.

Examples:

Here are four illustrative examples of self-assessment to help learners better understand the concept and recognise the benefits of this method in their training:

Example 1: Reflection sheet after a practical assignment

Situation: After a practical assignment, the trainee fills out a reflection sheet to evaluate her performance.

Procedure:

- 1 The trainee answers questions such as:
 - a. "What went particularly well in the care of my patients?"
 - b. "Where did I have difficulties and why?"
 - c. "What can I do better next time?"
- 2 She rates their performance on a scale (e.g. from 1 to 5) in various categories such as communication, time management and professional expertise.
- 3 The practical instructor then discusses the reflection with the trainee and provides feedback.

Objective: The learner is encouraged to realistically assess their strengths and weaknesses and to work specifically on improvements.

Example 2: Video analysis of own activity

Situation: The learner is filmed performing a nursing activity, such as wound care.

Procedure:

- 1 After the recording, the learner watches the video and analyses their own performance based on predefined criteria, e.g. "Did I follow the hygiene guidelines?" or "Was my communication with the patient appropriate?"
- 2 She notes what she has achieved and identifies areas where she was unsure.
- 3 This is followed by a feedback discussion with the practice supervisor, who complements the learner's assessment.

Objective: Video analysis promotes self-reflection and helps to identify unconscious mistakes or behaviour.

Example 3: Self-assessment prior to a formal assessment

Situation: Before an official assessment, the trainee is asked to evaluate their own performance in a specific area.

Procedure:

1. The learner completes a self-assessment, e.g. on the quality of their care documentation, and answers questions such as:
 1. "Have I collected all the relevant information?"
 2. "Are my formulations clear and understandable?"
2. She compares her assessment with the assessment criteria that are also used by the practice supervisor.
3. In the subsequent discussion, the self-assessments and external assessments are compared in order to clarify any differences.

Objective: The trainee is actively involved in the assessment process and learns to assess their performance better.

Example 4: Daily reflection as part of a learning diary

Situation: At the end of each working day, the learner writes a short reflection on their experiences and their own performance.

Procedure:

1. It answers questions such as:
 - "What tasks have I successfully mastered today?"
 - "Were there any situations in which I was unsure?"
 - "What new insights have I gained?"
2. The practical instructor reviews the learning diary at regular intervals in order to encourage the learner's reflection.
3. The entries are analysed together in a feedback session and the learner receives tips for further improvement.

Objective: The daily reflection promotes continuous self-assessment and helps the learner to document and understand their learning progress.

4.2. External Assessment

External assessment is carried out by an external body, usually a practical instructor, teacher or colleague. It provides a more objective assessment of the trainee's skills and complements the subjective view of the learner.

Objectives of the external assessment:

a. Objective evaluation:

Practice supervisors can evaluate the performance of trainees on the basis of defined standards and criteria in order to obtain an objective picture.

b. Give feedback:

External assessments offer learners an outside perspective and help them to recognise blind spots in their self-perception.

c. Document performance development:

Practical instructors can observe and document the progress of trainees in order to plan targeted support measures.

Methods of external assessment:

- **Direct observation:**

Practice supervisors observe the trainees at work and assess specific skills such as technical knowledge, practical skills and communication skills.

- **Evaluation forms:**

Standardised evaluation forms enable a structured assessment of performance based on objective criteria.

- **Feedback discussions:**

After observations or performance assessments, practice supervisors give learners targeted feedback on their strengths and areas for improvement.

Advantages of external assessment:

- External assessment ensures compliance with training standards.
- External assessment offers learners an external perspective that complements their self-perception.
- Enables the recognition of strengths and weaknesses that learners may not be aware of.

4.3. Promoting Reflection Through Self-assessment

Reflection is a key skill in nursing, as nurses are constantly confronted with complex situations that require quick, well-founded decision-making. Self-assessment plays a crucial role here, as it helps learners to scrutinise their own actions and their consequences.

Measures to promote reflection through self-assessment:

a. Guidance for reflection:

Practical instructors can guide learners by asking specific questions, e.g:

- "What went well, and why?"
- "What could I have done differently?"
- "What consequences did my actions have for the patient and the team?"

b. Use of learning diaries:

Regularly writing learning diaries encourages self-observation and reflection. Learners not only document facts, but also their feelings and thoughts about the situations they have experienced.

c. Include peer feedback:

Learners can evaluate each other and give feedback, which strengthens their ability to reflect.

d. Feedback from practical instructors:

Practice instructors should provide feedback after the learners' self-assessment that supplements or questions this self-perception.

Advantages of reflection through self-assessment:

1. Improves the ability to make decisions in care.
2. Strengthens the ability to learn from experience.
3. Promotes the development of professionalism and a sense of responsibility.

4.4. Objective Assessment by Practice Instructors

Objective assessment by practical instructors is essential in order to effectively organise both self-assessment and external assessment. This requires clear criteria, transparent communication and the ability for self-reflection on the part of the practical instructors.

Steps towards objective evaluation:

1. Establish clear assessment criteria:

Practice supervisors should be guided by defined standards and training objectives. Criteria should be specific, measurable and comprehensible, e.g:

- "Can create the care plan independently."
- "Communicates empathetically with patients and relatives."

2. Document observations:

Practice supervisors should record their observations in writing in order to minimise subjective bias and make the assessment comprehensible.

3. Self-reflection of the practical instructors:

Practice supervisors should be aware of their own possible prejudices and regularly scrutinise their assessment:

- "Have I assessed every learner fairly?"
- "Do I include my personal opinion or sympathy?"

4. Comparison of self-assessment and external assessment:

The comparison of self-assessments and external assessments makes it possible to recognise discrepancies and respond to them in a targeted manner. This promotes a more realistic self-perception among learners.

Tools to support objectivity:

• **Checklists:**

Standardised checklists provide a structured basis for the assessment and reduce subjective influences.

• **360-degree feedback:**

This method combines assessments from practice supervisors, colleagues and even patients to provide a more comprehensive picture of performance.

• **Further training for practice supervisors:**

Regular training in professional judgement can help practice supervisors to improve their assessment skills.

Summary

The combination of self-assessment and external assessment is a valuable tool in nursing training. Self-assessment promotes the trainees' ability to reflect and take responsibility for themselves, while external assessment by practice instructors enables an objective assessment of their performance. Through clear assessment criteria, structured methods and conscious reflection on their own assessment methods, practice instructors can ensure that their assessments are fair, transparent and beneficial for the trainees.