



# Assessing Core Skills Top Tips & Techniques

**Always use the checklist** at the start of the process (available on the TSI website). This acts as a basic skills gap analysis and allows you to identify what they can complete, and where the candidate may need additional support; full training / up-skilling. A completed checklist will act as a foundation for developing the assessment plan, and the plan will be more meaningful as the candidate will have gone through the requirements in detail.

When developing the assessment plan, **don't focus on task completion** e.g., "Joe has already identified a variety of evidence which will meet the criteria for Task A and this task is to be completed by the end of May" As the portfolio will be built from the evidence of 'Required Activity' and will span across a number of tasks, **the plan needs to be more flexible** and can be developed and updated throughout the process. An example of a plan is attached to this newsletter.

**Start by finding a 'base task' for each required activity**, this will assist you and your candidate in understanding how the required activity fits into each task. It will also assist you when developing your assessment plan – see appendix 1 *Base Tasks*

**You don't want candidates gathering a lot of evidence before** submitting it for assessment as this can cause confusion (if the candidate has mis-understood the requirements or is 'tick happy' on their matrices). What you should be asking for is a small amount of evidence from a particular required activity eg. "Joe will present 3 consumer complaints that he has dealt with and will map them into the base task for assessment by the end of April" (this will be your first assessment). This will allow you see whether your candidate has understood how to complete his matrices, how to identify criteria met and whether the evidence is of the required standard. If you have any concerns or issues, you can address them early on in the process. You would carry out your second assessment once your

**As soon as an assessment has taken place** I recommend that the Internal Verifier conducts their 1st verification. This will allow the IV to confirm that the assessor documentation & evidence meet the required standards, and that the matrices have been completed in clear & logical manner. As an internal verifier, you **MUST** sample the portfolio at least 3 times during the process. If it's a new portfolio or assessor you will find that you'll sample it more often until you have confidence in that assessor.