

Performance Framework - Use Cases

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Actors

Administrator	A person that administers an assessment system, curriculum management system, portfolio system, or performance management system that uses one or more performance frameworks.
Assessment system	A system providing tools and a database for managing learner assessment data.
Curriculum developer	An individual or organization developing the structure and content of an educational program.
Curriculum management system	A system providing tools and a database to manage the structure and planning for a curriculum for an educational program.
Decision maker	An individual or organization that makes a decision with regard to academic or career advancement of the learner.
Evaluator	An individual or organization that reviews individual learner data as part of an education or assessment process.
External Program Evaluator	An individual or organization reviewing a learning program for evaluation purposes. An accrediting organization may be an external program evaluator.
Internal Program Evaluator	An individual or organization reviewing a learning program for purposes of internal program evaluation and improvement.
Learner	An individual engaged in study, training, or self assessment.
Mentor	An individual who reviews learner data as part of an ongoing formative feedback or to mentor the learner in their professional formation.
Performance framework developer	An individual or organization that develops a set of performance levels associated with a competency framework.
Performance management system	A system providing tools and a database to manage learner performance data.
Portfolio system	A system providing tools and a database where the learner can manage their own achievement data and resources.
Program administrator	An individual or group of individuals that administer a learning program.
Program evaluation system	A system that allows external program evaluators to review program evaluation data from multiple educational programs.

Map performance frameworks to competencies, including Entrustable Professional Activities

ID	PF10
Title	Map performance frameworks to competencies, including Entrustable Professional Activities
Actors	Framework developer
Trigger event	An organization wants to map performance frameworks to competencies, including Entrustable Professional Activities.
Success End Condition	The performance framework captures how the framework maps to competencies, including Entrustable Professional Activities.
Assumptions	The framework developer has developed a framework of performance levels related to a specific competency or competency framework.

Description	The framework developer maps how the performance framework relates to competencies and competency frameworks (including Entrustable Professional Activities). The framework developer translates that mapping, along with the performance levels, into a machine readable, specification conformant performance framework document.
Transactions	Converting the performance framework, including mappings to competencies, into a conformant XML document.
Exceptions	The performance framework is not accessible, not readable, not valid, or the mappings are misrepresented.
Potential Standards	Performance Framework

Publish a performance framework for use in curriculum planning and assessment

ID	PF20
Title	Publish a performance framework for use in curriculum planning and assessment
Actors	Framework developer
Trigger event	An organization wants to publish a machine-readable, specification conformant performance framework.
Success End Condition	The performance framework is available for download or referencing.
Assumptions	The framework developer has developed a framework of performance levels related to a specific competency or competency framework.
Description	The framework developer translates the human readable performance framework into a machine readable, specification conformant performance framework document. The framework developer posts the machine readable performance framework document on the Internet.
Transactions	Converting the performance framework into a conformant XML document.
Exceptions	The performance framework is not accessible, not readable, or not valid.
Potential Standards	Performance Framework

Import descriptions of performance levels for use in assessment

ID	PF30
Title	Import descriptions of performance levels for use in assessment
Actors	Framework developer, Administrator, Assessment system, Performance Management System, Curriculum Management System, or Portfolio System
Trigger event	An organization wants to download and use a performance framework developed by another organization.
Success End Condition	The performance framework is available for use in learner assessment systems.
Assumptions	The framework developer has developed a framework of performance levels related to a specific competency or competency framework. The performance framework is available as a machine readable, specification conformant document.
Description	The administrator downloads the performance framework or otherwise obtains a machine readable, specification-conformant version. The administrator imports the machine-readable performance framework into the Assessment system, Performance Management System, Curriculum Management System, or Portfolio System. The system stores the performance framework and enables administrators, evaluators, mentors, decision makers, and learners to begin working with it (i.e. defining learner's current performance levels and providing a roadmap for future learning).
Transactions	Importing the performance framework into the assessment system.
Exceptions	The performance framework is not successfully imported.
Potential Standards	Performance Framework

Reference a performance framework for use in assessment

ID	PF40
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Title	Reference a performance framework for use in assessment
Actors	Framework developer, Administrator , Assessment system, Performance Management System, Curriculum Management System, or Portfolio System
Trigger event	An organization wants to reference a published performance framework.
Success End Condition	The performance framework is available for use in an Assessment System, Performance Management System, Curriculum Management System, or Portfolio System.
Assumptions	The framework developer has developed a framework of performance levels related to a specific competency or competency framework. The performance framework is published on the Internet as a machine readable, specification conformant document.
Description	The administrator configures the Assessment System, Performance Management System, Curriculum Management System, or Portfolio System to use the performance framework by entering the URL of the machine readable, specification-conformant performance framework document. The system accesses the performance framework and any linked documents, enabling administrators, evaluators, mentors, decision makers, and learners to begin working with it (i.e. defining learner's current performance levels and providing a roadmap for future learning).
Transactions	Accessing the performance framework.
Exceptions	The performance framework is not accessible or not readable.
Potential Standards	Performance Framework

Describe an individual's current level of performance for purposes of formative or summative assessment

ID	PF50
Title	Describe an individual's current level of performance for purposes of formative or summative assessment
Actors	Evaluator, learner, assessment system
Trigger event	The learner is being assessed by an evaluator
Success End Condition	The learner's level of performance is captured electronically in an assessment system or performance management system in a manner that conforms with the performance framework being used by the organization.
Assumptions	The organization has an assessment system or performance management system with access to the performance framework in a machine readable format. Assessment instruments have been developed based on the performance framework.
Description	Evaluator accesses an assessment instrument in an assessment or performance management system. Evaluator uses the assessment instrument to indicate a level of performance (or multiple performance levels related to multiple competencies) for a learner. The system stores the performance level data for the learner.
Transactions	
Exceptions	Evaluator is unable to access the instrument or record the results.
Potential Standards	Performance framework Competency framework Educational Achievement

Describe an individual's level of performance over a longitudinal period for purposes of formative or summative assessment

ID	PF60
Title	Describe an individual's level of performance over a longitudinal period for purposes of formative or summative assessment
Actors	Evaluator, decision maker, learner, assessment system
Trigger event	The learner reaches a transition point that requires a longitudinal assessment.
Success End Condition	The learner's level of performance is captured electronically in an assessment system or performance management system in a manner that conforms with the performance framework being used by the organization.
Assumptions	The organization has an assessment system or performance management system with access to both the performance framework and the learner's performance assessment data in a machine readable format.

Description	An evaluator or decision maker accesses the learner's performance assessment data in an assessment or performance management system. Evaluator or decision maker reviews the learner's performance assessment data and uses that data to inform a longitudinal assessment of the learner. Evaluator or decision maker uses the assessment or performance management system to record the performance level for the learner for the longitudinal period. The system stores the performance level data for the learner.
Transactions	
Exceptions	Faculty is unable to access the learner's performance data or record the learner's performance level.
Potential Standards	Performance framework Competency framework Educational Achievement

Associate assessment evidence with a particular level of performance in a portfolio

ID	PF70
Title	Associate assessment evidence with a particular level of performance in a portfolio
Actors	Evaluator (or mentor?), learner, Portfolio system
Trigger event	Evaluator is reviewing evidence in a learner's portfolio
Success End Condition	The learner's level of performance with regards to a specific piece of evidence is captured electronically in a portfolio system in a manner that conforms with the performance framework being used by the organization.
Assumptions	The organization has a competency-based portfolio system leveraging the performance framework.
Description	Evaluator accesses a competency-based learner portfolio. Evaluator reviews evidence stored in the portfolio and associates a particular level of performance with that piece of evidence. The portfolio system stores the data regarding the association of the evidence to a particular level of performance.
Transactions	
Exceptions	Evaluator is unable to access the portfolio or associate the evidence with a performance level.
Potential Standards	Performance framework Educational achievement

Define where in a curriculum students are expected to achieve certain levels of performance

ID	PF80
Title	Define where in a curriculum students are expected to achieve certain levels of performance
Actors	Curriculum management system, curriculum developer, administrator
Trigger event	The curriculum developer integrates performance level expectations into the curriculum.
Success End Condition	The curriculum management system contains data on expectations for learner performance.
Assumptions	The organization has a curriculum management system capable of integrating performance frameworks.
Description	Administrator accesses the curriculum management system. The Administrator associates specific performance levels with parts of the curriculum, indicating where students are expected to achieve certain levels of performance.
Transactions	
Exceptions	Administrator is unable to access the curriculum management system or associate part of the curriculum with a performance level.
Potential Standards	Performance framework

Define what level of performance is required to progress to the next phase within a curriculum

ID	PF90
Title	Define what level of performance is required to progress to the next phase or block within a curriculum
Actors	Curriculum management system, curriculum developer, administrator
Trigger event	The curriculum developer integrates performance level progression requirements into the curriculum.
Success End Condition	The curriculum management system contains data on performance level requirements for progressing through the curriculum.
Assumptions	The organization has a curriculum management system capable of integrating performance frameworks for performance-based progression.
Description	Administrator accesses the curriculum management system. The Administrator associates specific performance levels with parts of the curriculum, indicating that they are required for progression to the next phase or block.
Transactions	
Exceptions	Administrator is unable to access the curriculum management system or associate part of the curriculum with a performance level.
Potential Standards	Performance framework

Use in a system that is capable of showing a learner changes in performance over time

ID	PF100
Title	Use in a system that is capable of showing a learner changes in performance over time
Actors	performance management system, administrator, mentor, decision maker
Trigger event	A learner mentor, or decision maker wants to review a learner's progress over time.
Success End Condition	The performance management system is able to display longitudinal data on learner performance.
Assumptions	The organization has a performance management system capable of accessing or storing performance data and displaying it to learners mentors, and decision makers.
Description	The learner, mentor or decision maker accesses the performance management system. IF a mentor or decision maker is accessing the system, the mentor or decision maker selects the learner to review. The learner, mentor, or decision maker selects a competency for which he or she would like to view performance data. The performance management system compiles and displays performance data related to the selected competency.
Transactions	Transfer of performance data to a performance management system.
Exceptions	The performance management system is unable to compile the full record of performance data,
Potential Standards	Performance framework Educational achievement

View data regarding the performance levels of learners in a program for purposes of program evaluation (external)

ID	PF110
Title	View data regarding the performance levels of learners in a program for purposes of program evaluation
Actors	External program evaluator, performance management or assessment system, administrator
Trigger event	The educational program undergoes an external program review, potentially as part of a program accreditation process.
Success End Condition	The external program evaluator has access to program data on learner performance.
Assumptions	The educational program has a performance management or assessment system capable of sending data to the External program evaluator in a machine readable, specification conformant format. The External program evaluator has a Program evaluation system capable of importing aggregate learner performance data from the educational program's performance management or assessment system.

Description	The administrator accesses the performance management system. The administrator uses the system to initiate the transfer of aggregate learner performance data to the program evaluation system. The external program evaluator accesses the program evaluation system to view data about the aggregate performance of learners in the educational program. The external program evaluator uses the aggregate performance data to make decisions and recommendations with regards to the educational program.
Transactions	Transfer of aggregate performance data to a program evaluation system.
Exceptions	The program evaluation system is unable to read the aggregate learner performance data. The performance management or assessment system is unable to send data to the program evaluation system.
Potential Standards	Performance framework Aggregate educational achievement data

View data regarding the performance levels of learners in a program for purposes of program evaluation (internal)

ID	PF120
Title	View data regarding the performance levels of learners in a program for purposes of program evaluation (internal)
Actors	Internal program evaluator, performance management or assessment system
Trigger event	The educational program undergoes an internal program review
Success End Condition	The internal program evaluator has access to aggregate program data on learner performance.
Assumptions	The educational program has a performance management or assessment system capable of presenting aggregate learner performance data.
Description	The internal program evaluator accesses the performance management system. The internal program evaluator uses the system to develop reports on aggregate learner performance data. The internal program evaluator uses the reports to make decisions with regards to the educational program.
Transactions	-
Exceptions	The program evaluation system is unable to compile aggregate learner performance data.
Potential Standards	Performance framework Aggregate educational achievement data

Publish program data for public viewing

ID	PF130
Title	Publish program data for public viewing
Actors	Program administrator, performance management or assessment system
Trigger event	The educational program wishes to/is required to publish its performance data.
Success End Condition	The public is able to view aggregate program data on learner performance.
Assumptions	The educational program has a performance management or assessment system capable of presenting aggregate learner performance data.
Description	The Program administrator accesses the performance management system. The Program administrator uses the system to develop reports on aggregate learner performance data. The Program administrator publishes the reports in a publicly accessible venue.
Transactions	-
Exceptions	The program evaluation system is unable to compile aggregate learner performance data.
Potential Standards	Performance framework Aggregate educational achievement data