

## How is policy linking conducted?

Policy linking is conducted in workshops with the participation of ministry officials, assessment specialists, pedagogy specialists, and local teachers. Donor representatives and implementing partner facilitators may contribute upon request. The purpose of policy linking is to link different student assessments to a common scale through global benchmarks using a standardized method. The global benchmarks allow countries to use their existing national assessments for reporting on global student learning outcomes. With policy linking, countries calculate the percentage of their students achieving global minimum proficiency. This satisfies the requirements of Sustainable Development Goal (SDG) 4.1.1 (a, b, and c) and USAID Foreign Assistance (“F”) indicators

(see the Policy Linking Overview for more information).

Donor agencies—the United Nations Educational, Scientific and Cultural Organization, the U.S. Agency for International Development, the World Bank Group, the U.K. Foreign, Commonwealth and Development Office, and the Bill & Melinda Gates Foundation—have supported the development of a Policy Linking Toolkit (PLT) and materials. These agencies are collaborating with several countries, including Bangladesh, Djibouti, Ghana, India, Kenya, Lebanon, Nigeria, and Senegal, to pilot the PLT. Training programs based on the PLT, materials, and pilots will be available for ministries and implementing partners

## What are the preparations for a policy linking workshop?

Policy linking workshop preparation involves several activities, with responsibilities shared by the ministry, donor agency, and implementing partner(s), as appropriate. Implementing partners (IPs) often have the responsibility to train ministries on policy linking. The preparatory activities for a workshop are detailed on a checklist provided in the PLT and summarized as follows:

No.	Activity	Responsibility
1	Introduce the policy linking process and obtain ministry buy-in, commitment, and approval	Ministry, donor agency
2	Determine the dates, agenda, assessments, participants, venue, and reimbursements	Ministry, donor agency, IP
3	Obtain the assessment tools, data sets, answer keys, scoring rubrics, and technical reports	Ministry, donor agency
4	Recruit and onboard national consultants, including a coordinator and content facilitators	Ministry, IP
5	Finalize the list of participants and contact information for officials, specialists, panelists, and others	Ministry, donor agency, IP
6	Reserve the venue, with plenary and breakout rooms, along with lodging, and arrange meals/snacks	Ministry, donor agency, IP
7	Prepare invitations for the participants, with workshop information; track responses and follow up	Ministry, donor agency, IP
8	Make funding available in-country, verify bank receipt, and organize payments, including wires to participants	Ministry, IP
9	Analyze data and develop/print/purchase materials, including slides, forms, spreadsheets, and stationery	Ministry, IP
10	Arrange participants’ transportation, possibly involving different modes and ticket reservations/purchases	Ministry, IP

Normally, global benchmarks are set on two assessments during one five-day workshop, or four assessments in two workshops. About 50 participants are present at any given time, as shown in the following table:

Ministry	
Ministry officials	4
Content facilitators	2
Panelists	30
Donor and IP	
Donor officials	3
IP representatives	3
Lead facilitators	2
Other	
Resource persons/observers	3
Workshop coordinator	1
Administrative staff	2

There are two types of facilitators: lead and content. The lead facilitators are primarily responsible for the technical aspects of the workshop, including the presentations. They must have experience with alignment and benchmarking, particularly with the Angoff benchmarking procedure. The content facilitators must have experience with student assessments,

curricula, and benchmarking. The coordinator must be skilled at planning and organizing, and work closely with the administrative staff (for finances and logistics).

In addition to the preparation and participation, these aspects of a workshop should be taken into consideration:

- **Global Proficiency Framework (GPF):** The GPF, which is the common scale used for policy linking, must be in the language of the assessments. It includes global content organized by grade, subject, and minimum proficiency level. Assessments are linked through benchmarks to the common scale (see the GPF Overview).
- **Student assessments:** The assessments for each workshop must have similarity in their format and mode. For instance, Early Grade Reading and Math Assessments (EGRAs/EGMAs, with timed subtasks) can be selected for one workshop and Curriculum-Based Assessments (CBAs, with multiple choice items) for another.
- **Pre-workshop analysis:** The facilitators, data analyst, and specialists must conduct specific calculations using the actual assessment data sets prior to the workshop. These include calculating item difficulties and setting up files for calculating impact data (percentages of scores by level) and intra- and inter-rater reliabilities in the workshop.

## How is a policy linking workshop implemented?

Policy linking workshops are implemented through a collaborative effort, with the different stakeholders assuming important roles to ensure its success. At the pilot stage, the Ministry and donor agency provide high-level support. An IP generally hires the workshop coordinator as the overall

manager, with the lead facilitators providing the plenary presentations/training. Either the Ministry or the IP provides the content facilitators, who oversee the panel activities. The coordinator and administrative staff handle the finances and logistics.

The following table provides a sample agenda for a five-day policy linking workshop, with post-workshop activities. There are three tasks for setting global benchmarks on each assessment, with presentations/training and activities (see below). Each day has a recap of the previous day's results and an introduction of the current day's activities.

Day 1
Opening, introductions, logistics & agenda
Background, objective, and tasks
Task 1 Presentation: Assessments, GPF, & alignment
Task 1 Activity: Align assessments & GPF
Day 2
Task 1 Activity: Align assessments (cont.)
Task 1 Presentation: Alignment results
Task 2 Presentation: Assessments, GPF, & matching
Task 2 Activity: Match assessments & GPF
Day 3
Task 2 Activity: Match assessments (cont.)
Task 2 Presentation: Matching results
Task 3 Presentation: Global benchmarking
Task 3 Presentation: Angoff method
Day 4
Task 3 Activity: Practice Angoff ratings
Task 3 Activity: Conduct Angoff ratings Round 1
Task 3 Presentation: Results from Round 1
Task 3 Presentation: Angoff method (review)
Day 5
Task 3 Activity: Conduct Angoff ratings Round 2
Task 3 Presentation: Results from Round 2
Task 3 Activity: Evaluate workshop
Closing & logistics
Post-Workshop
Data analysis
Report writing
Global reporting
Dissemination and use of results

Briefly, each task has the following presentation/training and activity:

- **Task 1** – Check the content alignment between the assessment and the GPF using a standardized procedure.

After receiving training on the assessments, GPF, and alignment, the panelists break out into their panels. They conduct item-content standard ratings for each of the assessment items on an individual and independent basis. The facilitators compile and analyze the ratings to determine the degree of alignment with the GPF.

- **Task 2** – Match each of the assessment items with the appropriate levels and descriptors of the GPF.

After receiving training on matching items with the GPF, the panelists break out into their panels. They build on the knowledge gained in the alignment task by matching each assessment item with the appropriate minimum proficiency level in the GPF. The panelists must reach consensus as panel on the matching.

- **Task 3** – Set global benchmarks (usually three benchmarks for four levels) using a standardized procedure.

After receiving training on Angoff benchmarking, the panelists break out into their panels. They build on the knowledge gained in the matching task by conducting two rounds of item ratings on an individual and independent basis. The facilitators analyze the ratings to calculate the initial (Round 1) and final benchmarks (Round 2).

# How are policy linking results reported?

Policy linking results are calculated during and after Task 3 of the workshops. For each of the Angoff benchmarking rounds, there are presentations on the initial (Round 1) and final (Round 2) benchmarks. As shown in the example below, the presentations include impact data, or the percentages of student scores in levels based on the global benchmarks for the assessment and the score distributions:

Global Minimum Proficiency Level	Grade 3 (percentages)		Grade 5 (percentages)	
	Reading	Mathematics	Reading	Mathematics
Below Partially Meets	4.4%	2.4%	2.1%	3.2%
Partially Meets	27.8%	30.2%	45.3%	49.5%
Meets	52.6%	54.6%	41.8%	39.8%
Exceeds	15.2%	12.8%	10.8%	7.5%

The facilitators also calculate benchmark reliability (location statistics, standard errors, and intra-and inter-rater reliability), along with classification accuracy and consistency. These statistics provide information to the Ministry, donor agency, and IP on the quality of the item ratings, benchmarks, and score classifications.

After the workshop, the facilitators are responsible for writing the technical report. It has sections on preparation, implementation, and results. This is provided to the Ministry and donor agency for global reporting. The results are also intended for use in planning and tracking improvements in student learning outcomes.