Developing the Enabling Context for Student Assessment in Chile

María-José Ramírez
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About the Series

Building strong education systems that promote learning is fundamental to development and economic growth. Over the past few years, as developing countries have succeeded in building more classrooms, and getting millions more children into school, the education community has begun to actively embrace the vision of measurable learning for all children in school. However, learning depends not only on resources invested in the school system, but also on the quality of the policies and institutions that enable their use and on how well the policies are implemented.

In 2011, the World Bank Group launched Education Sector Strategy 2020: Learning for All, which outlines an agenda for achieving “Learning for All” in the developing world over the next decade. To support implementation of the strategy, the World Bank commenced a multi-year program to support countries in systematically examining and strengthening the performance of their education systems. This evidence-based initiative, called SABER (Systems Approach for Better Education Results), is building a toolkit of diagnostics for examining education systems and their component policy domains against global standards, best practices, and in comparison with the policies and practices of countries around the world. By leveraging this global knowledge, SABER fills a gap in the availability of data and evidence on what matters most to improve the quality of education and achievement of better results.

SABER-Student Assessment, one of the systems examined within the SABER program, has developed tools to analyze and benchmark student assessment policies and systems around the world, with the goal of promoting stronger assessment systems that contribute to improved education quality and learning for all. To help explore the state of knowledge in the area, the SABER-Student Assessment team invited leading academics, assessment experts, and practitioners from developing and industrialized countries to come together to discuss assessment issues relevant for improving education quality and learning outcomes. The papers and case studies on student assessment in this series are the result of those conversations and the underlying research. Prior to publication, all of the papers benefited from a rigorous review process, which included comments from World Bank staff, academics, development practitioners, and country assessment experts.

All SABER-Student Assessment papers in this series were made possible by support from the Russia Education Aid for Development Trust Fund (READ TF). READ TF is a collaboration between the Russian Federation and the World Bank that supports the improvement of student learning outcomes in low-income countries through the development of robust student assessment systems.

The SABER working paper series was produced under the general guidance of Elizabeth King, Education Director, and Robin Horn, Education Manager in the Human Development Network of the World Bank. The Student Assessment
papers in the series were produced under the technical leadership of Marguerite Clarke, Senior Education Specialist and SABER-Student Assessment Team Coordinator in the Human Development Network of the World Bank. Papers in this series represent the independent views of the authors.
About the Author

María-José Ramírez is an Education Specialist in the Human Development Network at the World Bank. She has been working on the SABER-Student Assessment initiative, developing tools for evaluating the quality of assessment systems. Before joining the Bank, she was involved in key reforms of the assessment system in Chile, with responsibilities in both national and international assessments. In the Chilean Ministry of Education, she headed the data analysis unit of the assessment program (SIMCE) (2005–06) and worked as a national coordinator for TIMSS (1998–2000). She also was the College Director of Universidad Diego Portales, Chile (2007–09). She led university-level projects related to quality assurance, institutional analysis, accreditation, and academic evaluation. In the United States, she was a research assistant in the TIMSS and PIRLS International Study Center (2000–04). She received her PhD in educational research, measurement, and evaluation from Boston College (2004) and was the recipient of a Fulbright scholarship (2000) and the 2005 award for best empirical dissertation from the International Association for the Evaluation of Educational Achievement (IEA). Her work and publications focus on student assessments, education quality, and comparative education.
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Abstract

Developing a strong assessment system is a priority for many countries. But where should they start? This paper describes the journey experienced by Chile to develop the enabling context (policies, institutions, and human and fiscal resources) for its large-scale assessment program, its university entrance examinations, and classroom assessment activities. Countries aiming to develop their assessment system may draw valuable lessons from this case study, most importantly the following: (i) developing the right enabling context is a long-term process that builds on gradual changes; (ii) stakeholders should be represented in the governance of the assessment unit; (iii) while different institutional arrangements are possible for an assessment unit, it is important that the unit is accountable and autonomous to make technical decisions; (iv) countries need to develop local capacity in assessment; and (v) countries need to anticipate the pressure the expansion of the education system will put in the assessment system, especially in the university entrance examinations. Countries that can benefit from these lessons will be in a better position to continue on the journey of strengthening their enabling context for an effective assessment system.
Executive Summary

Countries aiming to develop their student assessment system should find some interesting lessons in this case study. Chile was a pioneer among developing countries in strengthening its student assessment system, which encompasses three main types of assessment activities: the national large-scale assessment program, the university entrance examinations, and classroom assessment activities by teachers and students. This achievement required putting in place the right enabling context; that is, developing the right policies and institutions, and ensuring the right fiscal and human resources for assessment.

In Chile, the development of each assessment type followed divergent paths. The national large-scale assessment started as a pilot program housed in a university. The university entrance examination program was developed by one university, and then voluntarily adopted by the others. While classroom assessment has been a common practice since the foundation of the school system in the nineteenth century, the country still has little institutional capacity to support it.

The enabling context for each type of assessment varies considerably in Chile. Both the large-scale assessment and the university entrance examinations have been in place for several decades. These programs are highly institutionalized thanks to clear regulations, organizational structures, stable funding, and trained staff. At the same time, the enabling context for classroom assessment is weak. While some policy documents and guidelines are available online, implementation of these guidelines remains weak.

Key drivers that have allowed for the development of the assessment system in Chile include strong political and technical leadership from the Ministry of Education and universities, political and economic stability, social pressures, and curricular reforms.

Important lessons can be extracted from this case study. Developing a strong assessment system takes time, effort, commitment, and resources. There is no one right way to develop a sustainable assessment system. Nevertheless, some important ingredients include having a long-term vision, planning for gradual implementation of changes, ensuring representation of stakeholders in the governance of the assessments, creating local capacity, and securing enough funding. Countries that manage to put at least some of these ingredients in place will be in a better position to develop their assessment system and, most importantly, to contribute to education quality.
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María-José Ramírez

Introduction

Student assessment plays a key role in promoting education quality, which is a strategic priority for a growing number of countries. Because education is mainly about learning, assessing student learning has gained attention in the political arena. Assessment is now considered a key policy area of any education system.

A growing number of countries are interested in developing strong assessment systems that contribute to improved education quality. Assessment contributes to quality by clearly signaling what students are expected to learn, by monitoring and certifying student learning, by tracking students into different education paths, and by informing teaching and learning. How can a country start building an effective assessment system? Where do you start when there are no institutions, policies, and funding for the assessment? How do you create an assessment culture with teachers that are “assessment literate”? 

Because of the challenges involved in developing an assessment system, governments are interested in learning from the experience of other countries. The purpose of this case study is to track the development of Chile’s assessment system, and to offer lessons to other countries aiming to develop their own assessment. Chile is an interesting case because its student assessment system is relatively strong compared to other developing countries. This study analyzed the development of three types of assessment activities: large-scale assessments, university entrance examinations, and classroom assessments. The focus is on the conditions or enabling context that allowed for the development of the assessment, encompassing policies, institutions, and human and fiscal resources.1

In learning from the Chilean experience, countries should consider the broader context in which the assessment operates. Chile is an upper-middle-income country that still needs to reduce poverty and inequality rates. The country’s return to democracy in 1990 provided the necessary political stability to allow for social and economic growth. Chile is a leader in Latin America for its economic development: the gross national income GNI per capita was US$10,120 in 2010, economic growth averaged 4.1 percent of gross domestic product (GDP) between 1991 and 2005, and the Human Development Index is “very high.” Poverty was reduced from 20 to 15 percent between 2000 and 2009. However,

1 For a general discussion of the enabling context for student assessment, see Clarke (2012).
Chile is lagging in the distribution of the wealth: its Gini coefficient (52) is the worst among Organisation for Economic Co-operation and Development (OECD) countries.2

The education system in Chile is relatively strong compared to Latin America, but weak when compared to richer countries. In primary education, coverage is universal; in secondary education, it expanded quickly, reaching 96 percent in 2006. In tertiary education, the expansion was also strong, reaching 40 percent in 2012. Investment in education is high when considering public and private expenditures (7.1 percent of GDP), but it is low when considering public expenditures only (4.2 percent of GDP). The results of national and international assessments show that Chilean students are slowly reaching higher performance levels, but overall performance remains low compared to richer OECD countries, and is unevenly distributed along social classes.3

The road to develop a student assessment system is not an easy one. Transiting this road takes time and effort. The main lesson from this case study is that countries aiming to put in place their assessment system first must ensure the necessary conditions or enabling context for the system to operate. These conditions encompass the policy framework that supports the assessment, the right institutions and organizational structures, together with the appropriate human and fiscal resources. The absence of any of these conditions may put at risk the development and sustainability of the assessment system.

The paper is organized as follow. After this introduction, the second section provides a general description of the national large-scale assessment program, its enabling context, changes to the enabling context, and drivers that allowed for those changes. The third section provides similar information for the university entrance examinations, while the fourth section does the same for classroom assessment. The last section presents the main lessons.

Large-Scale Assessment

This section reviews the evolution of the enabling context of Chile’s national large-scale assessment program, SIMCE (Sistema de Medición de Calidad de la Educación). The first subsection presents an overview of the SIMCE, describing its main purposes, mandate, and technical features. The second subsection describes the enabling context in which SIMCE was operating as of 2012, providing information about the laws, institutional arrangements, and human

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3 All data gathered from World Bank EdStats, OECD’s Education at a Glance report and PISA program (www.oecd.org), Chile’s Ministry of Education (www.mineduc.cl) and Ministry of Social Development (www.ministeriodesarrollosocial.gob.cl), and Chile’s national assessment program (www.simce.cl).
and fiscal resources that support the program. The third subsection analyzes
how these laws, institutions, and human and fiscal resources have changed over
the years, while the fourth subsection identifies the drivers that allowed for these
changes to take place.

**General Description**

Chile’s large-scale assessment program (SIMCE) has been operating on a yearly
basis since 1988. The program aims to improve the quality and equity of
education by reporting about student performance and their learning
environment.

Two somewhat opposed rationales explain how SIMCE is expected to
contribute to education. The first one states that SIMCE would improve
efficiency by pushing schools to compete for education quality, parents’ choices,
and funding (Majluf 1987). SIMCE would inform parents about school test scores
(an indicator of quality), so that they could choose the best school for their
children, no matter if public or private. The assessment was developed in the
context of a national voucher policy where the state pays a subsidy to the schools
based on student enrollment and attendance.

The second rationale argues that the assessment program would contribute
effectiveness by monitoring student performance and supporting pedagogy.
Effectiveness would be improved by monitoring how many students were
reaching the learning standards set by the national curriculum. Pedagogical
support would be provided by disseminating guidelines and reports to school
supervisors and teachers (Himmel 1996).

The assessment program is highly institutionalized. SIMCE has been
operating in the Ministry of Education since 1992. The office has the necessary
autonomy to make decisions based on technical criteria, and to report results
despite political costs for the government. This has been possible thanks to the
integrity of the different government administrations.

Since 1996, the assessment program has also been responsible for
coordinating international large-scale assessments. The SIMCE office has
coordinated, or is coordinating, the following assessments: ICILS 2013; ICCS/
and TIMSS 1999, 2003, 2011.4

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4 Chile first participated in an international assessment in 1968–1972—the Six Study Survey, administered
by the International Association for the Evaluation of Educational Achievement (IEA). Participation in
international assessments was resumed in 1997 with the Latin American Laboratory for Assessment of the
Quality of Education (LLECE), administered by the United Nations Educational, Scientific and
Cultural Organization (UNESCO). Chile has also participated in IEA’s International Civic and
Citizenship Education Study (ICCS); IEA’s International Computer and Information Literacy Study
(ICILS); UNESCO’s Laboratorio Latino Americano de Evaluación de la Calidad de la Educación (LLECE);
OECD’s Program for International Student Assessment (PISA); and IEA’s Trends in International
Mathematics and Science Study (TIMSS).
The large-scale assessment program has high technical quality and credibility. Rigorous procedures are followed in all the steps of both the national and international assessments. The technical standards of international assessment exercises have always been met. Assessment results are systematically used to inform decision making and are widely disseminated in the media. SIMCE results are seen as the most credible indicator of education quality and equity in the country (Ramírez, 2012).

The national assessment is a technically sophisticated program. SIMCE provides information about student performance in core curricular areas: mathematics, language (Spanish), and sciences (natural and social). The questions are mainly in multiple-choice format, but open-ended questions and essays have been gradually introduced. All schools and students in the target grades (4, 8, and 10) participate in the assessment. In 2010, nearly 500,000 students from near 9,000 schools answered the SIMCE tests. Students, their parents, and teachers also answered background questionnaires. Around 22,500 test supervisors and external administrators were directly involved in the field operation.

Enabling Context

This subsection describes the main features of the enabling context of Chile’s large-scale assessment program. These features encompass the policy framework, public support for the assessment, institutional arrangements, and the human and fiscal resources allocated to the program.

In Chile the large-scale assessment is mandated by law. The law states that regular assessments of student learning should be carried out with the aim to improve education quality and equity. The law ensures the availability of resources to run both the national and international assessments. All schools must participate in the national assessment and their results must be widely disseminated.

The assessment program has wide public support. SIMCE is the most credible indicator of education quality in the country. It is largely backed, or at least accepted, by students, teachers, parents, the academia, the media, politicians, and the government. The main criticism against SIMCE is that it stigmatizes poor public schools. Claims about corruption or irregularities are very isolated.

Chile has a clear institutional arrangement supporting the assessment. As of 2012, SIMCE is located in the Curriculum and Evaluation Unit of the Ministry of Education. It is accountable to the Minister of Education, and to the National

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5 Since the early 2000s, new areas (writing, English, computer skills, and physical education) and grades (2, 6, and 11) have been added to the assessment on a sample or census base.

Education Council, an autonomous public agency that oversees education quality in the country. SIMCE’s organizational structure includes the following teams: subject areas, data processing, communication, standard settings, quality control, special needs and adaptations, and information technologies.

There is a special unit that coordinates international assessments. However, most of the tasks related to the international assessments are executed by the same teams in charge of the national assessment (for example, data processing). Other functions are delegated to other teams of the Ministry of Education (most notably, human resources).

SIMCE has a qualified staff to run the assessment. The staff has a suitable technical profile and is recruited based on merit. As of 2012, SIMCE has a staff of around 70 people, including subject matter specialists, teachers, psychologists, textbook specialists, economists, engineers, and budget and administrative staff. In terms of contractual status, 20 percent of the staff benefits from a contract as a public employee; the other 80 percent has to renew their contracts on a yearly basis. Most of the staff has a bachelor’s degree (Licenciatura), nearly one-fourth has a master’s degree, and two people have a doctorate. Most of the staff is in the early stages of their professional career and got on-the-job assessment training. There is enough staff stability to allow for capacity building and to train new personnel.

Chile invests 0.26 percent of the primary and secondary education budget in its large-scale assessment program. The SIMCE yearly budget is public, and in 2012 it reached US$26 million, out of which US$2 million was devoted to international assessments. The costs of the national assessment per student reached US$20 in primary and US$15 in secondary schools (which seems relatively low compared to other Latin American countries). In 2004, the biggest budget lines were personnel (28 percent of the total budget), printing (20 percent), and field work (15 percent).7

Mechanisms of Change
This subsection analyzes the mechanisms of change that allowed for the current level of development of the large-scale assessment program in Chile. It examines how the legal framework, institutional arrangements, infrastructure, staff, and budget evolved over time. These changes allowed for a successful revamping of the assessment office around year 2000.

The legal framework supporting the assessment has been in place for more than 20 years, and was recently updated. The large-scale assessment was first mandated by law in 1990. This law ensured the transfer of the assessment into the Ministry of Education, and a stable budget to operate on a regular basis. However, the law lacked legitimacy since it was passed at the end of the military

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7 As for 2012, the budget from primary and secondary education reached near US$10,000 million. All data based on Chile’s 2012 budget law (http://www.dipres.gob.cl); on personal communications with the SIMCE office, and on Wolff (2007).
regime. In 2009 and 2011, with Chile now under a democratic government, two related laws came to replace the first one. These new laws mandated that both the national and international assessments should be in charge of a quality assurance agency independent from the Ministry of Education, and accountable to a Superintendence of Education (this institutional change has yet to be implemented) (see Government of Chile 2009, 2011).

Different institutional arrangements have supported the large-scale assessment. Initially, the program was commissioned by the Ministry of Education to Universidad Católica de Chile, the leading private university in the country. From 1982–84, the assessment was no more than a pilot survey hosted in a university (Majluf, 1987). From 1988–92, the program was run by a team from both the university and the Ministry of Education; and was gradually transferred into the Ministry of Education. During the 1990s, SIMCE was housed under the office of the Under-Secretary of Education. In year 2000, it was absorbed into a new Curriculum and Evaluation Unit in the Ministry of Education. In 2013, SIMCE is expected to be transferred into the aforementioned quality assurance agency.

The revamping of SIMCE came together with new infrastructure to carry out the assessment. In 2000, SIMCE moved into a new building, strategically located near the Minister’s office. The new offices provided the additional space needed for contracting more staff. SIMCE got new servers and data processing equipment.

The assessment staff has changed in parallel with the different institutional arrangements of the program. In the 1980s, the university staff in charge of the pilot assessment program was a highly qualified multidisciplinary team of 10 professors (most of whom had graduate degrees in engineering, education, psychology, and sociology from prestigious universities in the United States) (Himmel 1996; Majluf 1987). In the 1990s, when SIMCE was transferred into the Ministry of Education, the staff in charge of the assessment was a team of approximately 20 full-time public employees. Most were school teachers who had left the classrooms many years ago. Many were in the latest stages of their career, just before retiring.

In the 2000s, when SIMCE was transferred into the Curriculum and Evaluation Unit of the Ministry of Education, the staff was greatly increased and professionalized. The hiring of a critical number of new staff—three to start with, including a new SIMCE director—allowed for putting needed changes into motion.

The assessment staff more than tripled in 15 years. The permanent staff grew from approximately 20 in 1996, to 40 in 2000, and up to 70 in 2010. Young professionals from different fields came to reinforce the technical capacities of the existing team. The technical leadership was provided by new senior staff, some of whom had completed graduate studies at prestigious universities in Europe and the United States. However, they all had to learn by doing the basic
assessments-related tasks. Having both the old and the new staff working together was a challenging task.

The yearly budget for the assessment program has increased more than 10-fold during the last two decades. During the 1990s, the yearly budget was US$2 million; in 2001 it was US$2.5 million; in 2011, US$22.7 million; and in 2012 US$26 million.\(^8\)

**Drivers for Change**

The following drivers allowed for changes in the legal framework, institutions, and human and fiscal resources for running the large-scale assessment program in Chile:

- **Leadership.** Leadership from both the Ministry of Education and academia allowed for launching and sustaining the assessment program. This leadership was also required for revamping the assessment office and ensuring increased resources.

- **Education as a national priority.** This created the need for an assessment program that could provide better information about the quality and equity of education. SIMCE became the main indicator for judging the effectiveness of education reform programs.

- **Political stability.** This provided the context for long-term commitments and sustainable reforms. An ad hoc technical-political commission (Comisión SIMCE) was created in 2003 to agree on the development agenda of SIMCE.

- **Economic growth.** Economic growth of the country allowed for the gradual increase of the assessment budget and the hiring of more staff.

- **Curricular reform.** This created the need to align the SIMCE tests with the new curriculum. The institutional solution for doing so was the creation of the Curriculum and Evaluation Unit of the Ministry of Education. This need for alignment triggered the revamping of the assessment office.

- **Social pressures.** In 2006, student protests against poor education quality translated into a stronger legal framework and a new institutional arrangement for the assessment. In the near future, schools will be more closely monitored by a quality assurance agency.

- **Participation in international large-scale assessments.** TIMSS and PISA provided high-quality, hands-on training on all key aspects of the assessment. This training directly benefited the staff in the international assessment unit as well as the staff working in the national assessment program. The new knowledge and technology was quickly transferred from the international to the national assessment program.

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\(^8\) All data based on Chile’s national budget (http://www.dipres.gob.cl) and Himmel (1996).
The University Entrance Examinations

This section reviews the evolution of the enabling context of Chile’s university entrance examination program (Prueba de Selección Universitaria, PSU). The first subsection presents a general overview of the PSU. The following subsection analyzes the enabling context of the PSU as of 2012. The last two subsections examine reforms to the enabling context and the drivers that allowed (or blocked) these reforms.

General Description

The university entrance examination program is part of the educational landscape in Chile. It has been in place since 1967 and it is the main gatekeeper for distributing educational opportunities. It is the highest-stakes test that most Chilean students will take in their lifetime. Depending on their results, students will gain access to a wide quality range of university programs, which in turn will greatly affect their ability to get a good job and a good salary.9 The examination receives wide media coverage, especially during the administration and university application process.

The examination program was created by the leading public university in the country, Universidad de Chile. This university made the examinations available to all other universities, while retaining the copyrights. Therefore, what was envisioned as the university entrance examinations for one institution grew to become the university entrance examinations for the whole country.

Since the creation of the university entrance examinations, there have been two test batteries. The first battery (Prueba de Aptitud Académica, PAA) was a paper and pencil, multiple-choice test that included two compulsory “aptitude tests” in mathematics and language; five optional subject-specific tests in (advanced) mathematics, social sciences, biology, chemistry, and physics; and one compulsory subject-specific test in history of Chile. In 2003, a new battery based on a recently-introduced secondary school curriculum (Prueba de Selección Universitaria, PSU) came to replace the PAA examination.10 PSU is also a paper and pencil, multiple-choice battery that includes two compulsory tests in mathematics and language and two optional tests (students have to take at least one) in social sciences and natural sciences.

The examination administration involves a vast and complex operation. The majority of secondary school graduates (78 percent in 2009) take the test, making its administration a major event in the country. In 2011, 231,000 students sat for

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9 See Futuro Laboral at http://www.futurolaboral.cl/.
10 The shift from PAA to PSU reflected a new vision of learning. The PAA examination was based on the assumption that the skills (or aptitudes) measured in the tests were innate, and hence were not affected by (lack of or poor) education. The PSU model, on the other hand, recognizes that both contents and skills are affected by education. Hence, it is fairer that the test measures the contents and skills that all students have a chance to learn at school through the national curriculum.
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the examination in 169 testing centers. The tests are administered by external administrators under strict standardization and security conditions.

A tight timeline allows for only two months between the time students take the examinations and when they apply to university. The PSU is administered once a year at the end of the school year (usually mid-December) at the same time in the whole country. Examination results are released mid-January and the university selection process concludes at the end of that month. This tight timeline is necessary for allowing the academic year to start in March.

Results are confidential, and can be accessed online using the students’ national identification number. The results include the examination scores from each test, and a score based on the students’ secondary school grades, both of which are also used to apply to university. Students apply to the university programs of their preference using a weighted score. University programs weight the scores from the different tests and from the school grades depending on the relative importance given to each one.

Chile has two university application processes, which run on parallel tracks. The centralized application serves around half of the universities in the countries (33/60). Students can apply to the universities and related career options through an automated system, and universities select students based on their scores and places available. For the other universities, students have to apply to each institution separately, making the whole process less efficient and cumbersome.

**Enabling Context**

This subsection describes the main features of the enabling context of the university entrance examination program in Chile as of 2012. This includes its governance and institutional framework, human resources and funding, policy regulations, and public support.

The bureau in charge of the examination, the Departamento de Evaluación, Medición y Registro Educatacional (DEMRE), is a semi-autonomous department of Universidad de Chile. DEMRE is accountable to two institutions: the provost office of Universidad de Chile (Vicerrectoría de Asuntos Académicos) and the Council of Rectors. The provost office is responsible for overseeing all issues related to the yearly budget of DEMRE, its personnel, administration, equipment, and infrastructure.

The Council of Rectors operates as an autonomous examination board. It has an examination committee (Consejo Directivo para las Pruebas de Selección Universitaria y Actividades de Admisión) that addresses all strategic issues (both technical and political) regarding the PSU. The committee is supported by an

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11 Secondary school grades (which are on a scale of 1–7) are transformed into the same scale of the examination tests (which are on a standardized scale with $M = 500$ and $SD = 110$).

12 The centralized application process benefits all the traditional universities existing in Chile before 1981. In 2012, for the first time newer private universities were allowed participate in the central application process. Eight new universities joined the central process that year.
advisory board (Comité Técnico Asesor) that liaises between the committee and the examination bureau, DEMRE.

The governance of the examinations has legitimacy problems. The Council of Rectors does not represent most of the universities in the country (35 out of 60 universities are excluded). Instead, it only represents the “traditional” universities existing in Chile before 1981.13 The council is formally headed by the Ministry of Education, but, in practice, Universidad de Chile is its most powerful member.

DEMRE is responsible for executing the examination policies agreed by the Council of Rectors. It is in charge of all core examinations areas, including developing and administering the examinations, data processing, publishing examination results, and student applications to universities. The bureau has seven units: test construction, student registration, data processing, logistics, communications, research and development, and management and budget.

DEMRE has stable and professional staff to carry out its duties. It has 75 public employees, most of whom work full time (both with term and non-term contracts). Many of them have been working at DEMRE for more than 10 years. The staff includes teachers and subject matter specialists, statisticians, computer specialists, media specialists, and administrative and support staff. Around 10 percent of the staff has a master’s or doctorate degree; in some cases, these degrees are in areas directly related to student assessment (for example, psychometrics).

The main source of professional development for the examination staff has been on-the-job training, and short training courses. Around 30 out of the 75 DEMRE staff have benefited from annual intensive two-week courses to learn about key assessment topics (for example, test construction, scoring, scaling, and logistics). DEMRE contracted these courses with a prestigious assessment center in the United States (Educational Testing Services, ETS).

The examination bureau has a stable budget that is negotiated on a yearly basis with its host institution, Universidad de Chile. The budget is not public, but it was around US$10 million in 2011. The budget covers all direct operational costs of DEMRE, including test design, administration, data processing, dissemination, students’ enrollment in the examination, and their application to universities. Exceptionally, in 2011 and 2012, the budget from the Ministry of Education allocated US$582,000 for an international and independent review of the examination.14

Students have to pay a fee to enroll in the PSU examination, but state subsidies are available for those who cannot afford it. In 2011, 272,000 students

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13 In 1981, a law was passed allowing the creation of new private universities. Thirty-five private universities exist today in Chile based on this law. These universities are not part of the Council of Rectors.

14 All data based on Chile’s national budget (http://www.dipres.gob.cl), on the examination bureau webpage (www.demre.cl), and on personal communications with the bureau.
enrolled in the test, of which 150,000 benefited from the US$8 millions available in state subsidies to pay the examination fee (US$50 per student). The examination fee allowed Universidad de Chile to collect around US$13.6 million, 36 percent more than the DEMRE yearly budget. More information would be needed to know if the examination fee reflects the real costs of the PSU.

In Chile, there is no national law that recognizes the university entrance examination. Instead, every year the Council of Rectors publishes the PSU regulations. Universities have autonomy to decide their policies, and they recognize the PSU examination in their admission regulations.

Public support for the university entrance examinations has been suffering. While the PSU is free of corruption, a growing number of stakeholders perceive it as unfair. Lower-income students get systematically lower scores than higher-income students, and therefore are less likely to get into a quality university. Support has also suffered as a consequence of the governance of the examination board (OECD and World Bank 2009, chapter 5).

Mechanisms of Change

While the university entrance examination program grew to national scale after being launched, its governance and institutions, personnel, budget, and the policy framework supporting it do not seem to have changed accordingly.

Because of historical reasons, the examination bureau has always remained a unit within Universidad de Chile, although with different names, functions, and organizational dependency. The major change occurred in 1996, when the examination bureau and the admission office of the university were separated to avoid conflicts of interest. The current institutional arrangement seems out of line with the fact that the examination is now a national public good.

The staffing of the examination bureau has remained relatively stable since the 1990s, despite the growing number of students taking the examinations and the greater technical sophistication of the tests. Changes in technology have allowed for greater efficiency. For instance, whereas before, the DEMRE personnel had to manually register all students, today students enroll for the examination online. Accordingly, the existing personnel have been reallocated to new functions.

The budget for the examination bureau also seems to have remained relatively stable in the last decade. It is uncertain that DEMRE has benefited from the additional resources brought in by the additional number of students enrolling in the examinations.

The policy framework that supports the examination (PSU regulations and university admission policies) has also remained essentially the same. The main variation is that all new universities have adopted the PSU in their admission policies.
Drivers for Changes

This subsection analyzes how the expansion of the education system affected the enabling environment of the examination in Chile.

The main driver that allowed for the creation of the university entrance examinations in Chile was the expansion of the university system. In the 1960s, Universidad de Chile opened regional campuses that allowed increasing its enrollment by more than 3,000 students (10 percent increase). To select in a fair way students from all over the country, the university implemented the university entrance examinations. This examination program was then adopted by the other seven universities existing in the country at that time.

In the 1980s, a second wage of expansion of the university system occurred when a new law allowed for the creation of new private universities. When the law was passed in 1981, Chile had 25 “traditional” universities (all derived from the eight original ones existing in the 1960s) that enrolled around 7 percent of the population. In 2012, Chile has 60 universities and enrollment in tertiary education is around 40 percent.15

In the 2000s, a third expansion of the university system occurred, this time by increasing the number of students attending already-existing universities. The number of students almost doubled, growing from 340,000 to 660,000 in 2001–11.16 The main factors behind this expansion were the greater number of students graduating from secondary education; more families being able to pay for university studies; and increased access to state subsidies, loans, and scholarships.

The expansion of the university system had a direct impact on the enabling environment of the examination. First, all new universities in Chile adopted the examination as their main entry criteria. Second, the expansion affected the governance of the examination. When the examination was created, the Council of Rectors represented all eight universities existing in the country at that time. Today, the council still represents these original institutions only (or institutions derived from them), excluding from among its members all new private universities created after 1981.

Pushes for reform have arisen as a consequence of the lack of representation of the Council of Rectors. They have also arisen as a consequence of the excessive power that Universidad de Chile seems to have in the council. Despite the fact that the Minister of Education heads the council, in practice, s/he has little power to influence its “autonomous” universities. Pushes for bidding the examination as a means to end the monopoly of Universidad de Chile have failed.17

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15 All data based on Chile’s Ministry of Social Development’s 2009 National Socioeconomic Survey (Encuesta Casen) and the Ministry of Education, (www.mifuturo.cl).
16 See Ministry of Education’s website: http://www.mifuturo.cl/.
17 The battle for the control of the university examinations reached its maximum expression when the Ministry of Education pushed for the alignment of the tests with the newly introduced secondary school curriculum. The Council of Rectors adopted this policy only after strong opposition.
Third, state subsidies paying for the examination fee of lower-income students have allowed more students to sit for the examination. These subsidies were introduced after the 2006 student protests for fairness in access to universities. After this policy was introduced, the number of students registering for the examination increased in 55 percent, from 175,000 in 2005 to 272,000 in 2011.

Fourth, the growing number of students registering for the examination allowed for a significant increase in the amount of money collected by Universidad de Chile. Additional information would be needed to know if these additional resources are reaching the examination bureau.

**Classroom Assessment**

This section reviews the evolution of the enabling context of classroom assessment activities in Chile. The first subsection presents an overview of the current state of classroom assessment. The following subsection analyzes the enabling context as of 2012. The last two subsections examine the changes to the enabling context and the drivers that allowed (or not) for these changes to take place.

**General Description**

Classroom assessment is what teachers do in schools every day. It is the process of collecting, synthesizing, and interpreting information to aid in pedagogical decision making, supporting student learning (formative assessment), and judging student performance (summative assessment). It encompasses the formal grading of students’ work as well as more informal observations of students (Airasian 2005).

By far, classroom assessment is the most important type of assessment. Because it happens in direct contact with teachers and students, it has the greater power to boost learning, as compared to external examinations or large-scale assessments. Classroom assessment is deeply embedded in any educational process. Nevertheless, it receives the least attention compared to examinations and large-scale assessments.

It is not easy to talk about classroom assessment in Chile. Despite the existence of classroom assessment practices since the school system was founded in the nineteenth century, this is an activity that remains part of the “black box” of the education process. Teachers assess their students in thousands of school classrooms around the country, with little support and supervision. There is scarce systematic information about classroom assessment, and the information generated is not used to inform policy.

Chile does not have strong mechanisms to ensure the quality of classroom assessment. In fact, the inspection/supervision system does not oversee the
quality of tests, quizzes, and the grading system used in schools. Supervisors do more of a bureaucratic review of student transcripts. Moderation processes where teachers review and adjust their assessments are not part of the assessment culture in Chile.

As a consequence, classroom assessment suffers from important weaknesses, including the following:

A normative approach dominates classroom assessment. It is common practice that the maximum score (7) is given to the best-performing student, and the passing score (4) is matched with 60 percent of correct responses. This normative approach contrasts with a criterion-referenced approach based on curricular standards.

It is not part of the teaching culture to use explicit, a priori set criteria for grading students. In general, teachers do not use “scoring guides” and do not engage in moderation practices with their colleagues to ensure that the same criteria are used to score student work. These are common practices in high-performing school systems.18

There is a large gap between the official curriculum and classroom assessment practices. For instance, important curricular topics are not covered by classroom assessment; there is an emphasis on the assessment of lower-order cognitive skills; and there is an overemphasis on multiple-choice questions (Ministerio de Educación 2009).

Teachers have few opportunities to learn about classroom assessment in pre- and in-service teacher training programs. Teachers are not “assessment literate” to implement the reform curriculum. As a consequence, classroom assessment practices are weaker compared to other teaching activities (for example, as compared to planning and implementing a pedagogical activity).19

Grade inflation and the application of uneven standards in grading students are common. The lowest-performing schools (as measured by the national assessment program, SIMCE) tend to give the higher grades to their students (Ficher and Repetto 2003). Students (and their families) feel cheated when they get very high school grades but are not even able to reach the cutoff point on the university entrance examinations to apply to a university.

There is no quality assurance system that monitors classroom assessment practices at the school level. The current inspection/supervision system does not monitor classroom assessment practices from a pedagogical standpoint (that is, activities, tests and grading criteria, scoring and grading, and feedback to the students). Supervisors ensure grades are correctly registered for bureaucratic purposes mainly. The Ministry of Education does not have a centralized information

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18 Moderation refers to the process of applying comparable standards for evaluating student work or responses. In schools, it involves groups of teachers looking at examples of student work, discussing the extent to which these meet the expected standard, and coming to agreement on the level of attainment represented by each example. The group may comprise staff from one school, from different schools or across authorities. See Darling-Hammond and Wentworth (2010).

system that gathers regular information on classroom assessment, and that uses that information to inform policies.

These weaknesses prevent an effective use of classroom assessment for learning. They also raise concern about the validity of using student grades as an input to apply to the university, as discussed above. Secondary school grades are typically weighted 20–30 percent in computing the final application score to university programs (the complement comes from the university entrance examinations). School grades are a relatively strong predictor of success at the university and are less correlated with socioeconomic background of the students, compared to PSU examination test scores (Comité Técnico 2010). However, the lack of a moderation system threatens the comparability of student grades across schools. As an option, there are efforts to rank students based on their school grades and to include this information in the formula to apply to the university.

**Enabling Context**

In a typical Chilean school, classroom assessment is guided by the school regulations stating the purposes, frequency, types, and consequences of the assessment. These regulations must be aligned with the Ministry of Education’s decrees and standards about classroom assessment. The National Education Council, an autonomous public institution, is ultimately responsible for approving ministerial guidelines related to grading, and promotion/retention policies.

Classroom assessment decrees from the Ministry of Education state that:

- Students should be evaluated regarding attainment of objectives stated in the official school curriculum.
- All schools must have their own assessment regulations, which should specify procedures for informing parents and students about their grades, pass/fail criteria, and procedures for assessing students with special needs, among others.
- Grade marks should be assigned using a scale from 1 to 7, with 4 as the passing score.
- Consideration for student promotion to the next grade should include the number of subject areas successfully completed and attendance rates.

Teaching standards (Ministerio de Educación 2004) and school management standards (Ministerio de Educación 2005) further specify the functions of classroom assessment: to ensure learning for all students, to monitor student learning based on the curricular standards, to adjust instruction based on assessment results, and to inform parents about student performance. Classroom

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20 See Ministry of Education’s decrees at www.mineduc.cl.
assessment standards included in the teaching standards are also used as criteria in the Chilean Teacher Evaluation System.\textsuperscript{21}

While regulations about classroom assessment are quite progressive, they seem to have little impact at the classroom level. In practice, classroom assessment is mainly about grading students and complying with bureaucratic regulations, that is, filling the class book.\textsuperscript{22} Teachers have little training and support to engage in high-quality classroom assessment practices.

Nevertheless, the Ministry of Education has published some assessment material for teachers. This material is available from the web pages of some programs sponsored by the Ministry of Education, including the large-scale assessment program SIMCE. Key documents are:

- \textit{Teaching and school management standards}. These include criteria for high-quality classroom assessment and for using its information to monitor learning (Ministerio de Educación 2004, 2005).

- \textit{Progress maps describing the typical sequence of learning}. These guidelines are available from grades 1 through 12, in mathematics, Spanish, social sciences, natural sciences, and English (as a second language). They provide examples of the kind of tasks students are expected to do at different levels.\textsuperscript{23}

- \textit{Guidelines for Assessment for Learning}. These guidelines are available for grades 1 through 8 and support educators in improving their assessment practices. They provide modules on designing technically sound assessments, defining and using assessment criteria, and providing feedback to promote students’ learning.\textsuperscript{24}

- \textit{Centrally designed tests for the teachers to use in their schools}. These tests were designed with the aim that teachers use them to diagnose the performance level of their students and to set end-of-school-year learning goals.\textsuperscript{25}

To what extent these guidelines are reaching the classroom remains an open question. The design and availability of classroom material is a first important step. However, a strategy for reaching all the schools seems to be missing.

Classroom assessment does not seem to be considered a strategic area for improvement. The Ministry of Education does not have a team or budget

\textsuperscript{21} Teacher evaluation is mandated by law for all teachers working in public schools. http://www.docentemas.cl/dm_sistema_eng.php.

\textsuperscript{22} The class book is used by teachers to keep track of topics covered in classes and homework, and students’ attendance, grades, disruptive behavior, among others. This book is used by the school administration and the school supervisors to monitor compliance with regulations and to provide pedagogical support.

\textsuperscript{23} See Ministry of Education’s webpage: http://www.mineduc.cl.


\textsuperscript{25} See Ministry of Education’s webpage: http://www.planesdemejoramiento.cl/.
specifically devoted to this area, and does not have a quality assurance system to support and supervise classroom assessment.

There is little public awareness about the importance of classroom assessment. This is not a topic discussed in the media and has little coverage in education forums. Nevertheless, classroom assessment is gaining more attention as a consequence of the increased importance of student grades in applying to the university, as discussed previously.

Mechanisms of Change
Attempts to improve classroom assessment practices have focused on normative and pedagogical guidelines. In the 1990s, decrees specifying classroom assessment activities and procedures came to light in the context of the curricular reform. In the 2000s, clearer guidelines stating what constitutes good classroom assessment practices were published. No reforms were implemented to bring these guidelines into the classroom. For instance, no systematic training was offered to pre- and in-service teachers, and the supervision/inspection system was not aligned to ensure the quality of classroom assessment practices.

A small classroom assessment team existed at the Ministry of Education until 2010. In 2002, when the team was located in the Curriculum and Evaluation Unit, it had a staff of one or two people, not full time. The team leader had a doctorate degree and was familiar with the literature on assessment for learning. Other team members varied from year to year, had a bachelor’s or master’s degree, and got on-the-job training in classroom assessment. From 2005 to 2009, the annual budget allocated to classroom assessment activities reached US$80,000 (not including the salary of the classroom assessment team). The classroom assessment team, activities, and budget were eliminated in 2010.

Drivers for Changes
Two main factors have worked against having a stronger enabling environment for classroom assessment in Chile. First, there is a vision of classroom assessment as a control and bureaucratic tool. This vision is very dominant among educators and is associated with behavioral theories of learning. In the 2000s, this vision started to change with the introduction of the new curriculum and the growing demand from teachers asking for guidelines on how to assess their students in the context of the new curriculum. It also started to change with the influence of the literature of assessment for learning and the technical leadership provided by staff at the Ministry of Education.

The second factor that has worked against a stronger enabling context for classroom assessment is a vision where the state interferes as little as possible with school processes. According to this vision, the government that took power

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26 Personal communication with Ministry of Education staff.
in 2010 seems to be pushing toward fewer guidelines and less support and supervision for classroom assessment.

Lessons Learned

The development of Chile’s assessment system required putting in place the right enabling context, which included the necessary policies, institutions, and fiscal and human resources. What are the main features of the enabling context? Through which mechanisms it has evolved? What drivers allowed for these changes to take place? Table 1 summarizes the answers to these questions.

Table 1. Key features of the enabling context, mechanisms of change, and drivers for change of Chile’s student assessment system

<table>
<thead>
<tr>
<th>Enabling Context</th>
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<tbody>
<tr>
<td><strong>Large-scale assessment:</strong> Chile has a highly stable and institutionalized large-scale assessment program (SIMCE) that has been operating on a yearly base since 1988. A law mandates the assessment, and ensures its regular funding. The law also specifies the governance and institutional arrangement of the assessment office. Stakeholders generally support the assessment. The program has a stable, sufficient, and qualified staff. The program has a public, stable, and sufficient yearly budget that reached US$26 million (0.26 percent of the education budget) in 2012.</td>
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<tr>
<td><strong>University entrance examinations:</strong> A highly stable and institutionalized examination program has existed in Chile since 1967. There is no national policy recognizing the examinations; instead, autonomous universities recognize them in their admission policies. The examination scores are trusted, but they are perceived as unfair because lower-income students get systematically lower scores than higher-income students, and therefore have lower chances to get into university. The examinations are governed by an autonomous board; however the board does not represent most of the universities in the country. The examination office is located within a host university, and is accountable to both the university and the governing board. The examination office has stable, sufficient, and qualified staff. The host university funds the examination office with stable and sufficient budget. While the budget is not public, it is estimated to be around US$10 million. Students have to pay US$50 to take the examinations.</td>
</tr>
<tr>
<td><strong>Classroom assessment:</strong> This activity has existed since the school system was established in the nineteenth century. It is highly embedded in the teaching culture. The Ministry of Education has no institutionalized quality assurance mechanisms to supervise and support classroom assessment activities in schools. There are policy documents and assessment guidelines for teachers, but very weak implementation. The Ministry of Education has no staff and no funding exclusively devoted to support classroom assessment. Despite weak practices, classroom assessment is not a topic of public concern.</td>
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(Table continues on next page)
### Mechanisms of Change

**Large-scale assessment program:** The assessment program started as a pilot in a university with uncertain funding and future. A law allowed for the institutionalization and transfer of the program into the Ministry of Education. A new law yet to be implemented will transfer the program to an autonomous institution. The assessment office was successfully revamped in a relatively short time spam (five years). The revamping was triggered by the need to align the assessment to a new national curriculum. A more professional work culture was developed by hiring more professional staff, by tripling the staff size, and by training staff. The program budget increased more than 10 times in two decades.

**University entrance examinations:** The university entrance examination program was created in 1967 for one university, but ended up being adopted by all other universities, and eventually became a national examination program. New universities have voluntarily adopted the examination in their admission policies. The governance and institutional arrangement of the examination have remained essentially the same over time, leading to weaker representation and legitimacy. Examination staff have benefited from a training program provided by a leading assessment center in the United States. The examination budget has remained relatively stable since the 1990s.

**Classroom assessment:** There has been no clear development of classroom assessment activities. The main change has been the publication of pedagogical guidelines online. A small team existed in the Ministry of Education, but it only lasted a few years. A small budget allocated to the team was eliminated.

### Drivers for Change

**Large-scale assessment:** Technical and political leadership from both academia and the Ministry of Education allowed for the creation, institutionalization, and revamping of the assessment program. Making education a national priority created the need for stronger indicators of education quality. Political stability, economic growth, and consensus building allowed for long-term planning and additional funding. Curricular reform triggered the revamping of the assessment office and the alignment of the tests with the new curriculum. Social pressures pushed for the transfer of the assessment office into a semi-autonomous quality assurance agency (yet to be implemented). The assessment staff greatly benefited from hands-on training provided by international large-scale assessments.

**University entrance examinations:** The examination program was created in response to the expansion of the university system. Academia provided technical leadership for its development. Pushes for reform in governance have failed, despite that fact that most universities are not represented on the examination board. Student protests pushed for the introduction of state subsidies to register for the examinations. The examination budget has remained relatively stable since 1990, despite the fact that the number of students paying to take the examinations has grown more than 50 percent in the last decade.

**Classroom assessment:** Two factors have worked against the development of stronger institutional support for classroom assessment in Chile: (i) a perception of classroom assessment as a control and bureaucratic tool, rather than as a tool to support learning; and (ii) a vision where the state has to interfere as little as possible with school processes, including classroom assessment. Nevertheless, these visions have been changing as a consequence of curricular reforms, teachers’ demands for assessment guidelines, and the international literature on assessment for learning.

The main lessons that can be extracted from the Chilean experience for other countries aiming to set the right enabling context for developing their assessment system are as follows:
Ensuring economic and political stability. This was a necessary condition for consensus building, long-term planning, and for securing increased resources for the national assessment.

Thinking for a long-term process. Developing an assessment system takes time. Countries should not expect to put in place in two to three years what took others decades. In Chile, both the large-scale assessment and the university entrance examinations were piloted several years before their institutionalization.

Implementing gradual changes. Implementing an assessment program is an extremely challenging task. Countries should not attempt to implement the assessment program all at once, but rather to implement it step by step. On doing so, countries will develop local capacity to run the assessment, and will evaluate which assessment options work better in the country. For instance, in Chile the national assessment started as a regional pilot study. In subsequent rounds, the assessment was gradually brought to national scale.

Having strong leadership. Technical and political leadership were essential for successfully developing the large-scale assessment program in Chile. This leadership allowed for the launching a pilot assessment program, its transfer into the Ministry of Education, and the revamping of the assessment office around year 2000. On the other hand, the lack of leadership and vision has jeopardized the development of the university entrance examinations and classroom assessment. Reforms to the examinations have been driven more as a reaction to external pressures rather than by a clear vision and leadership. Reforms to classroom assessment do not seem to have permeated teaching practices.

Ensuring fair access to the examinations. No student should be denied the right to take the examinations, and the examination fee should reflect the real costs of the examinations. Chile, as well as other countries, has put in place funding mechanisms to pay for the examination fee of those who cannot afford to pay it. However, more information is needed to judge if the fee reflects the real costs of the examinations.

Adapting to the expansion of secondary and tertiary education. Many developing countries are currently witnessing a welcome expansion in the number of students finishing secondary education and aiming to continue their studies at university. This expansion will push the countries to develop more fair and efficient examinations for university selection. It will also push the countries to ensure that all students can take the examinations. It is important that the countries anticipate these social changes, putting in place university selection systems that are perceived as fair and valid by stakeholders.

Having the right policies. The legal mandate recognizing the large-scale assessment was essential for its institutional development and sustainability. Policy documents and assessment guidelines have also been important to support classroom assessment. However, in the case of the university entrance examinations, no legal mandate was required. Universities voluntarily adopted
the examination and recognized it in their admissions policies. A national policy mandating the examination would not be appropriate in a country that has a strong tradition of autonomous universities.

*Ensuring that stakeholders are represented.* Because of the high-stakes nature of the examination, stakeholders should be represented in the examination board to ensure the legitimacy and political viability of the tests. In Chile, this was the case when the university entrance examinations were created. In the coming decades, new universities were created in the country. Today, the board excludes from its members these newest universities. The governance and institutions supporting the examination should be able to adapt to new scenarios.

*Finding the right institutional arrangement.* Different institutional arrangements are possible for the assessment office: a university center, within the ministry of education, or a semi-autonomous institution. In Chile, the large-scale assessment program has transited all three types. What is important is to ensure that the office is accountable and has the autonomy to take technical decisions. Having a university hosting the examination bureau does not seem to be the most desirable arrangement when the examinations become a national public good.

*Capacity building.* Countries need to develop local capacity to run the assessment. On-the-job training and short courses seem to be the most cost-effective for capacity building. In Chile, the assessment staff greatly benefited from the hands-on training provided by the international large-scale assessments. The examination staff has mainly benefited from short-term courses provided by a leading assessment center in the United States. On the other hand, no capacity seems to have been developed to support classroom assessment.

The capacity of the countries to put together the right enabling environment is key for developing an effective assessment system. This capacity will depend, at least in part, in the countries’ ability to learn from the experience of others. The Chilean experience will hopefully shed light on how to move forward in the challenging task of developing a strong assessment system. By doing so, countries would be on the road to improve their assessments and, most importantly, to boost student learning.
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Developing the Enabling Context for Student Assessment in Chile


Developing a strong assessment system is a priority for many countries. But where should they start? This paper describes the journey experienced by Chile to develop the enabling context (policies, institutions, and human and fiscal resources) for its large-scale assessment program, its university entrance examinations, and classroom assessment activities. Countries aiming to develop their assessment system may draw valuable lessons from this case study, most importantly the following: (i) developing the right enabling context is a long-term process that builds on gradual changes; (ii) stakeholders should be represented in the governance of the assessment unit; (iii) while different institutional arrangements are possible for an assessment unit, it is important that the unit is accountable and autonomous to make technical decisions; (iv) countries need to develop local capacity in assessment; and (v) countries need to anticipate the pressure the expansion of the education system will put in the assessment system, especially in the university entrance examinations. Countries that can benefit from these lessons will be in a better position to continue on the journey of strengthening their enabling context for an effective assessment system.

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