



# IN PURSUIT OF TRANSFORMATION

## FIVE YEARS OF INVESTMENTS IN ASSESSMENT AND ACCOUNTABILITY INNOVATION

Prepared By Education First

January 2025



Executive Summary..... 5

Introduction and Overview..... 10

Part 1: Explorations & Accomplishments..... 15

- How might we measure student learning more equitably and effectively?..... 16
- What should we measure to better understand student, school and community progress? ..... 24
- How can systems of accountability build trust and transparency *and* drive improvement? ..... 30
- How can data, knowledge and ideas be shared to advance change? ..... 39

Part 2: Lessons Learned ..... 45

Considerations for the Future ..... 49

Link to Organizational Profiles..... 55





# ABOUT THIS REPORT

**T**his report provides a summary of explorations, accomplishments and lessons learned from more than 90 organizations working to advance the future of assessment and accountability design, research and policy. The organizations were supported by the Chan Zuckerberg Initiative, the Gates Foundation and the Walton Family Foundation. The Education First team developed this report after reviewing more than 250 artifacts, publications and grant reports and interviewing program officers across the three foundations. Fifty-five organizations also participated in sensemaking sessions and provided input to inform the report. The organizations and individuals mentioned in this report are referenced for informational purposes only. Their inclusion does not imply their endorsement or agreement with all the views, conclusions or recommendations expressed in this report, which reflect the perspectives and analysis of the authors alone.

## ABOUT THE AUTHORS

This report was authored by Khaled Ismail, Principal Consultant at Education First. Emma Fortier and Kyra Hudson led the research, contributed to the writing of the report and facilitated engagement with partner organizations and funders. Emily Brookhart, Ila Deshmukh Towery, Dave Powell and Jennifer Vranek supported the analysis and engagement with partner organizations and funders. Ross Hogin designed the report.

## ABOUT EDUCATION FIRST

***Education First* is a national, mission-driven strategy and policy organization with deep expertise in education improvement.** We help system leaders, advocates, funders and policymakers think bigger and work smarter to create the conditions that drive equity, coherence and excellence for all students. Our mission is to deliver exceptional ideas, experience-based solutions and results so all students—and particularly Black, Indigenous and other students of color and students living in low-income communities—are prepared for success in college, career and life.

**We are seasoned strategists and trusted practitioners.** Since 2006, Education First has partnered closely with education leaders to design and implement policies and systems that cultivate outstanding educators, engaged students and effective organizations. Our team of 80+ staff has taught in public schools, advised superintendents, governors and CEOs, staffed

national and state policy organizations and school districts, developed public policies and lobbied legislatures, led successful nonprofit advocacy organizations, worked for and with major media outlets, and managed multimillion-dollar education grantmaking programs. We bring authentic, in-your-shoes expertise in the content, issues, and politics of making real change that yields real results for educators and students.

For questions about this report or to learn more about Education First’s work on issues related to assessment and accountability, contact [Khaled Ismail](#).





# ABOUT THIS REPORT

## ACKNOWLEDGMENTS

We are grateful to the many individuals who provided guidance and time and who shared their knowledge with us to inform this report through interviews, participation in sensemaking sessions and 1:1 discussions, and developing organization profiles.

Adam Zalisk	Danielle Eisenberg	Lindsay Kubatzky	Paolo Terni
Adam Ezring	Devon Young	Lisa Harmon-Martinez	Peter Worth
Amalia B. Chamorro	Edward Hui	Lisa Hicks	Raul Gonzalez
Aneesha Badrinaryan	Elizabeth Figueras-Gilbert	Lorena Mancilla	Rianna Saslow
Angela Bahng	Gabriela López	Macke Raymond	Scott Marion
Angela Duckworth	Heejae Lim	Marc Chun	Sophia Velez
Anne Hyslop	Horatio Blackman	Marianne Perie	Steve Sireci
Asha Canady	James Gurney	Marzena Sasnal	Sue Krause
Anya Grottel-Brown	Jamie McKee	Meg Benner	Talia Gerstle
Barbara Pape	Jennifer Randall	Melissa Lazarin	Tiffany Miller
Brandee Tate	Jon Deane	Michael Petrilli	Tonantzin Mitre
Brandon Olszewski	Julianna Charles Brown	Michelle Oliva	Tony Monfiletto
Carly Bolger	Keith Catone	Molly Depasquale	Tracie Potochnik
Carter Romansky	Kara Davis	Nancy Weinstein	Tyler Sussman
Charlie Brown	Kimberly Smith	Nathan Dadey	Will Lorie
Christina Heitz	Kyle Butler	Nicholas Munyan-Penny	Walker Laughlin
Christy Hovanetz	Lauren Young	Oscar Santos	
Claire Voorhees	Lillian Pace	Paulo Carvalho	

The organizations and individuals mentioned in this report are referenced for informational purposes only. Their inclusion does not imply their endorsement or agreement with all the views, conclusions or recommendations expressed in this report, which reflect the perspectives and analysis of the authors alone.







# EXECUTIVE SUMMARY



Since 2019, more than 90 organizations—including state education agencies, nonprofits, advocacy groups, assessment developers and researchers—have led efforts to transform K12 assessment and accountability systems, supported by the Chan Zuckerberg Initiative, the Gates Foundation and the Walton Family Foundation.

**E**ducation First worked with these partner organizations to conduct a comprehensive retrospective “lookback” project to synthesize lessons learned from their efforts and to surface implications for the future. We conclude that these efforts have led to:

- The development of several new statewide summative assessment models.
- Improved interim and formative assessment products, especially in science.
- New data systems and infrastructure in service of communicating information to families and communities.
- Support for a robust, diverse and bipartisan advocacy community committed to improving systems of assessment and accountability.
- Better research infrastructure, tools and resources to disseminate learning and use data more equitably and effectively.
- Fundamental shifts in discourse and understanding of the importance of expanded definitions of student success and school quality, and the value of authentic community and stakeholder input in advancing more equitable solutions to transform K12 education.

Over the last five years, these efforts have contributed to progress in the education field on:



**Researching and documenting** the perspectives of key stakeholders—including students, families, educators and policymakers—regarding systems of assessment and accountability.



**Developing and testing new models,** tools and approaches to measurement, assessment and data use that better serve the needs of students and that more equitably engage school communities.



**Advancing dialogue** related to assessment and accountability policy and implementation to inform local, state and federal policy, including considerations for future reauthorizations of the Elementary and Secondary Education Act (ESEA).



## KEY INSIGHTS

1 Many stakeholder groups, including families, educators and policymakers, believe two kinds of data are critical for driving school improvement:

- 1) information about student learning and academic progress and
- 2) data that depict a more holistic view of students and their learning environments.

2 Across the education field and partner organizations, there are varying perspectives about the role that local, state and federal accountability systems should play and how they need to evolve to better capture and support improvement in student learning and school quality.

3 Most organizations who are working to explore possibilities in accountability and state assessment redesign are largely doing so within the parameters of what is allowable under the Every Student Succeeds Act.

4 The last two reauthorizations of ESEA were brought forward through a bipartisan coalition that prioritized student achievement, transparency and equity in resource allocation. And, while the pendulum on the role of federal policy, state and local autonomy has shifted over the last 20 years, our analysis of organizations' work—those focused on federal policy as well as efforts focused on local or state innovations—points to several shared values that could serve as a foundation for driving future dialogue.

5 There has been a marked shift in the field in how stakeholder input, buy-in and end-user experience are considered and leveraged in the assessment and accountability research and development (R&D) processes.

6 For many organizations, the most pronounced challenges of the past five years were ensuring the implementation fidelity of assessments and accountability innovations in the wake of COVID-19 recovery efforts.





## ACCOMPLISHMENTS AT A GLANCE

Much of the work of the the featured organizations is ongoing and continues to evolve. As of 2024, their efforts have supported the development of:

14+

**At least 14 new statewide** summative, interim and formative assessments to better assess student academic learning.

11+

**At least 11 tools** that have been tested, validated or are now in use to capture better information about students' sense of belonging, wellbeing and learning environments.

39+

**At least 39 frameworks**, tools or resources to support system leaders, educators, researchers and families to use data more equitably and serve students' needs.

Additional accomplishments are captured throughout this report and in the organization profiles.





## CONSIDERATIONS FOR THE FUTURE

Many organizations' efforts featured in this report were primarily led by or supported by school system and state education leaders, technical assistance partners, assessment developers and researchers and federal advocates. The Education First team offers the followings considerations for the future to each of these groups based on our analysis:

### FOR SCHOOL SYSTEM AND STATE EDUCATION LEADERS:

- Set a clear vision and theory of change for how you want to assess student learning, academic progress and school quality. Identify evidence-based practices, technological advancements and research efforts that could enable continuous improvement and coherence across your systems.
- Plan for transitions early and build internal capacity and buy-in for new solutions beyond cabinet leadership to ensure long-term sustainability.
- Ensure educators are authentically informing and participating in research and development efforts, surfacing implementation needs early in order to build adequate buy-in and support the scaling of new solutions.

### FOR ADVOCATES:

- Consider the implications of new and expanded definitions of student success and school quality and how future policy can continue to balance the roles of local, state and federal oversight.
- Encourage continued and regular updates to federal guidance to align with advancements in the field.
- Prioritize authentic, ongoing and meaningful engagement with key stakeholders, particularly those charged with implementing state and federal policies (educators, system and school leaders) to understand their needs, concerns and experiences.
- Advance a proactive national research and policy agenda for the future of assessment and accountability and foster renewed bipartisan dialogue on education policy.

### FOR TECHNICAL ASSISTANCE PARTNERS, DEVELOPERS AND RESEARCHERS:

- Continue to research, develop and scale proof points of broader measures of students' learning environments, context and wellbeing for use in driving school improvement.
- Deepen understanding of school improvement efforts and implementation of evidence-based practices.
- Ensure your education leaders and partners have realistic, achievable implementation plans with adequate capacity and support in place to ensure sustainability.
- Prepare for how technological advancements, including AI, will impact the future of assessment and accountability.

### FOR FUNDERS:

- Set goals for multi-year public and private partnerships that leverage both philanthropic and federal investments.
- Continue to incentivize collaboration, dot-connection and coordination across the field and invest in supporting infrastructure for productive knowledge and ideas exchange.
- Update grantmaking requirements to align with stages of the R&D process, prioritize understanding stakeholder and market needs and ensure wide dissemination of learnings.
- Continue to partner with organizations to plan for and support the sustainability of their efforts.








# INTRODUCTION AND OVERVIEW



Over the last five years more than 90 organizations have led the charge to advance innovative designs of assessment and accountability systems, as well as new policy ideas, research, tools and resources to support better learning outcomes for students nationwide.

As a result of these organizations' efforts, the education field has made progress on:

- 
**Researching and documenting** the perspectives of key stakeholders—including students, families, educators and policymakers—regarding systems of assessment and accountability.
- 
**Developing and testing new models,** tools and approaches to measurement, assessment and data use that better serve the needs of students and that more equitably engage school communities.
- 
**Advancing dialogue** related to assessment and accountability policy and implementation to inform local, state and federal policy, including considerations for future reauthorizations of the Elementary and Secondary Education Act (ESEA).

All of this work occurred within an extremely challenging and fast-evolving public education landscape. The COVID-19 pandemic, historic federal investments in school recovery and rapid advancements in technology have put new pressures on American schools and, at the same time, created opportunities to rethink the purpose and structure of schooling and how we define school quality and student success and to measure progress against that vision. The last five years have also highlighted the roles and tensions among local, state and federal policy in ensuring all students have the opportunities and support they need to succeed in school and life. The organizations featured in this report have made the most of these unusual circumstances to generate valuable knowledge for the field and drive significant achievements both locally and nationally.

*“The COVID-19 pandemic, historic federal investments in school recovery and rapid advancements in technology have put new pressures on American schools and, at the same time, created opportunities to rethink the purpose and structure of schooling and how we define school quality and student success and to measure progress against that vision.”*



**E**ducation First worked with the three foundations and their partner organizations to conduct a comprehensive retrospective “lookback” project to synthesize lessons learned from their efforts and to surface implications for the future. As part of this project, Education First:

- Reviewed 250+ artifacts, documents, grant reports and publications.
- Interviewed 15 program officers representing the three foundations about the grants in their portfolios.
- Engaged 55 organizations in sensemaking sessions to capture their feedback on the preliminary findings and gain additional insights about each organization’s successes, challenges and recommendations for the future.
- Created individual organizational profiles highlighting the work and accomplishments of partner organizations.

**This report compiles the accomplishments and lessons learned from more than 90 organizations over a five-year period. It outlines the collaborative approach taken across this extensive body of work, summarizes the organizations’ key explorations and achievements, and discusses implications and recommendations for the future based on individual organizations’ reflections and Education First’s analysis.**

## DEVELOPING SOLUTIONS TO EMERGING NEEDS

Over the past 30 years, the education field has experienced several significant waves of change aimed at improving the quality and scope of assessments and accountability systems. These shifts have elevated expectations from basic competency tests to more comprehensive, standards-aligned assessments across all grade levels and increased the rigor of high school

diplomas to better reflect college and career readiness. Collaboration across states to enhance assessment quality, reduce redundancy and achieve more accurate comparisons of results has also improved. And, there has been meaningful progress to guide states in identifying and supporting the lowest performing schools.

While these evolving priorities have shaped the landscape of educational assessment and accountability over time, in 2019, the assessment and accountability field was in a state of significant transition. New state accountability plans were rolled out under the Every Student Succeeds Act (ESSA) amidst a national resurgence of testing opt-out movements and a decline in state participation in the PARCC and Smarter Balanced consortia. Experts and researchers were increasingly highlighting the need for students to develop a different set of skills—deeper content knowledge, enhanced problem-solving abilities and stronger writing—to meet the rapidly evolving demands of the workforce. The COVID-19 pandemic also caused further disruptions and underscored the need for change. This report highlights the lessons learned during this five-year period between 2019-2024 and the ways organizations across the education field responded to these emerging needs to transform systems of assessment and accountability.

As a baseline, many organizations we feature in this report shared the view that summative assessments are an important tool to measure school and student performance and to hold schools and school systems accountable. They largely agreed about the importance of and equity implications of having annual, disaggregated data available to inform policymaking and resource allocation. At the same time, most organizations also acknowledged challenges with the current generation of standardized assessments, including concerns about their relevance, timeliness, accessibility and utility of the data they produce and the behaviors they incentivize.

Many organizations undertook this work of transformation with shared ideas about what it would take to create better, more equitable systems of assessment and accountability. Many believed that academic assessments needed to produce more actionable data that could be used by



teachers, school leaders and families to support students’ learning and development. Several organizations also shared the perspective that summative assessment data should have multiple uses beyond satisfying federal requirements and that innovations in summative assessments must, at minimum, address the long-standing pain points expressed by families, educators and students. And, all organizations wanted to better understand and respond to the data needs of educators, families and students and to more effectively and efficiently collect and communicate that information to them.

*“All three were interested in seeing the organizations they funded work more closely with communities and leverage the expertise of caregivers, educators and students in the development of new ideas and assessment tools.”*

Beyond their shared interests in improving academic assessment, many organizations were also interested in the development of new tools that measure more expansive definitions of student success and school quality, which could provide better data about students’ learning conditions, wellbeing and skills to ultimately support improvements in student learning. They were largely pursuing these goals for discovery purposes and to identify potential proof of concept and proof points to inform future efforts as well as local, state and federal policy. We found many promising examples of organizations’ partnering closely with various communities and leveraging the expertise of caregivers, educators and students in the development of new ideas and assessment tools.

The three foundations and their partner organizations sought greater collaboration among various stakeholders (caregivers, education leaders and policymakers) in the education field. They wanted to incentivize bipartisan dialogue among advocates, generate new policy ideas that could address pain points stemming from the implementation of No Child Left Behind and the Every Student Succeeds Act and support alignment for a national policy agenda that could inform future policy considerations in advance of a future ESEA reauthorization.

At the same time, across the organizations we engaged for this report, we see mixed views on how assessments can and should serve the data needs of various stakeholders, which measures should be used for accountability purposes and how accountability uses influence the behaviors of educators and school systems. There is limited agreement on whether it is necessary to incorporate a broader set of non-academic measures into formal accountability systems and many are grappling with the tradeoffs of incentivizing innovations that advance the needs of one stakeholder group over another. These tensions mirror fissures across the education field and represent both the challenge and opportunity of driving a shared national agenda for improving systems of assessment and accountability at scale.





## A COMMON LEARNING AGENDA EMERGES

In Education First’s review of this body of work and in our conversations with partner organizations and foundation staff, we identified clear themes and many shared insights. Looking back, we see that these organizations have advanced understanding and developed new tools that address four broad questions in the field.



### HOW MIGHT WE MEASURE STUDENT ACADEMIC LEARNING MORE EQUITABLY AND EFFECTIVELY?

**Twenty-seven initiatives** focused on addressing issues with end-of-year summative assessments, including the amount of time and resources they require, delayed results and lack of alignment to local curriculum or scope and sequence. To solve these problems, organizations focused on developing new models of summative assessment, designing formative and interim assessments that support student learning and building states’ capacity to adopt new assessment models at scale.



### WHAT SHOULD WE MEASURE TO BETTER UNDERSTAND STUDENT, SCHOOL AND COMMUNITY PROGRESS?

**Fifteen initiatives** focused on developing, validating and using tools that capture a more holistic picture of student and school success. Organizations had varying goals for their work in this area, including creating proof points for state and federal accountability systems, better understanding the needs of historically marginalized students, reducing disparities in access, learning experiences and outcomes, and supporting families in making informed educational decisions for their children.



### HOW CAN SYSTEMS OF ACCOUNTABILITY BUILD TRUST AND TRANSPARENCY AND DRIVE IMPROVEMENT?

**Twenty-one initiatives** focused on research to better understand 1) the types of data that students, families, educators and policymakers want from systems of accountability 2) how well current policy is working as intended and what opportunities for change might be possible and 3) improving the ways that information about school quality and student achievement is collected and communicated to teachers, parents and students.



### HOW MIGHT ORGANIZATIONS SHARE NEW RESEARCH, KNOWLEDGE AND IDEAS MORE EFFECTIVELY?

**Nineteen initiatives** focused on creating infrastructure to better support the translation of research to practice and the dissemination of learning. Organizations largely agree that the education field is too fragmented and that advancements in assessment infrastructure, technology and research are rarely disseminated widely or well understood by stakeholders. This group of grants also focused on the recruitment of diverse and innovative technical experts and incentivizing innovation through research and design.





# PART 1: EXPLORATIONS & ACCOMPLISHMENTS

The combined accomplishments of the organizations featured in this report are impressive, and there is considerable crossover in the issues and innovations they've explored over five years. We summarize the work they have undertaken in an effort to surface common themes and topics of interest that require continued dialogue, collaboration and learning.





# HOW MIGHT WE MEASURE STUDENT LEARNING MORE EQUITABLY?



**The assessment field is changing rapidly with evolutions in technology, advancements in data systems, machine learning and artificial intelligence. The days of paper and pencil scantron tests are long gone.**



**Today, most students experience assessments that are largely computer-based and adaptive. The types of items, testing user experience, item quality and item relevance to students have evolved significantly in recent years. At the same time, many stakeholders have concerns about the utility, timeliness and coherence of summative tests. Some also are working to improve the efficacy and quality of interim products available on the market.**

In the last five years, states, assessment developers, technical assistance organizations and researchers prototyped, piloted and scaled new academic assessment models that are more culturally and instructionally relevant and provide more timely and actionable information to school systems, educators and students. These organizations' ongoing assessment design work includes:

- Building states' capacity to support assessment and accountability policy and innovation
- Designing a new generation of state summative assessments
- Improving the quality and availability of formative and interim assessments
- Demonstrating deeper learning
- Providing capacity to state education agencies to support assessment design and implementation.

## BUILDING STATE CAPACITY TO SUPPORT ASSESSMENT AND ACCOUNTABILITY POLICY AND INNOVATION

Designing and implementing an assessment system requires significant resources, including time, personnel and funding. Several organizations are providing capacity, expertise and guidance to state education agencies (SEAs) to support them through the innovation process.

- **The Council of Chief State School Officers (CCSSO)** has prioritized supporting states in restoring assessment and accountability systems after pandemic-related disruptions and coordinating with the Department of Education (ED) on federal compliance concerns to advance future innovation in assessment and accountability. CCSSO has provided critical capacity and support to states through recovery from the effects of the COVID-19 pandemic. This support included coordination with ED to waive assessment and accountability requirements in the spring of 2020 followed by a series of critical restart and recovery resources focused on supporting states through SY 2020–2021. CCSSO has also provided critical guidance to states to support students with disabilities and English learners.
- **Carnegie Mellon University's State Education Agency (SEA) Fellows Program** pairs SEAs with academic partners and postdoctoral fellows who are helping them investigate key questions related to their design goals.
- CORE Districts in California are working with an EdAnalytics researcher to update, expand and validate social and emotional learning survey measures.



# EXPLORATIONS & ACCOMPLISHMENTS



- + Louisiana received support from a Carnegie Mellon University researcher to investigate the impact, scalability and pain points of its curriculum-aligned, through-year assessment in ELA.
- + The Massachusetts Consortium for Innovative Education Assessment received support from a University of Massachusetts researcher to build a schoolwide performance assessment systems model wherein student learning is assessed via a portfolio of student work.
- + Louisiana, Montana and New Jersey received support from New Meridian and a fellow to design and implement through-year assessment models that empower educators to adapt and personalize instruction.
- + South Carolina was paired with an EdAnalytics researcher to investigate the use of interim and benchmark assessments to measure, understand and predict student learning.

## DESIGNING A NEW GENERATION OF STATE SUMMATIVE ASSESSMENTS

Some organizations are exploring new ways to assess and communicate academic achievement by innovating on the traditional, end-of-year summative assessment model. They come to this work seeking to solve multiple problems with existing summative systems, including the excessive time and burden associated with annual end-of-year administration; inaccessibility of reporting systems; lack of alignment between assessments and the taught curriculum; and data that lack meaning and instructional utility for educators, students and families.

- **Education First** has designed and managed two grant programs (the Innovations in Assessment and New Measures Grant Program and the Curriculum-Connected Through-year Assessment Grant Program and Community of Practice from 2019-2024) to address one or more of the following objectives:
  - + Seed multiple new assessment designs and test prototypes that can subsequently 1) develop into full-scale operational systems to provide valid, reliable and comparable results and 2) can be brought to market as alternatives to current end-of-year summative models;
  - + Build new capacity for innovative assessment and accountability systems

In 2019, as part of the Innovations in Assessment and New Measures Grant Program, Education First invited 26 State Education Agencies (SEAs) and charter management organizations to apply for planning grants to innovate with summative assessment design, administration and reporting and/or generate better measures of skills and knowledge or for different student populations. Planning grants to seven states (Texas, Massachusetts,



New Mexico, Florida, North Dakota, Tennessee) and two charter management organizations (Summit Public Schools and KIPP Foundation) provided funds for each grantee to conduct an equitable design strategic planning process that engaged students, families and educators. The organizations also received technical assistance from the Center for Assessment, which included feedback and advice on the technical feasibility of the solutions, and Education First, which coached each team through the equitable design strategic planning process.

LEARN MORE ABOUT:

Building on the lessons learned from the Innovations in Assessment and New Measures Grant Program, Education First launched the Curriculum-Connected Through-Year Assessment Grant Program to incentivize and support the development of **through-year assessment models**. Through-year assessments are administered over the course of a school year and are designed to generate a single summative score meeting federal and state accountability requirements.

- **Education First** convened three assessment developers and leaders from more than 15 state education agencies to learn about and engage in a community of practice focused on scaling through-year assessment designs. Education First also provided targeted coaching and funding to a subset of those states to support planning and building capacity for implementation. The project has seeded multiple new assessment designs and test prototypes in English Language Arts (ELA), math and social studies that are being piloted and scaled for use in

multiple states. In addition to the funding, coaching and support to states and developers, Education First has provided input and guidance to the ED, advocacy organizations and technical experts to advance understanding and discourse around the promise of through-year assessment systems. As a result of the seed funding and support provided by Education First:



- + **New Meridian** leveraged grant funds to develop MasteryGuide, a system of short, instructionally aligned “testlets” in ELA and math that can be flexibly aligned to local curriculum and scope and sequences. This modular design enables districts to essentially build their own state tests to align with their local curriculum. Testlets “test what is taught, when it is taught” throughout the year, providing rich formative feedback for instructional purposes. Teachers adjust instruction to the needs of their classes throughout the year by returning to the curriculum and reinforcing concepts and skills as needed. Students continue to demonstrate mastery throughout the year, and MasteryGuide aggregates their through-year scores into a final summative score that eliminates the need for a final end-of-year test. **Montana** piloted MasteryGuide in grades 5 and 7 during SY 2022-23 and in grades 3 through 8 during SY 2023-24. The state expanded to statewide implementation of MasteryGuide over SY 2024-25. Montana expects to be the first state to submit the model for federal peer review by December 2025.
- + **New Meridian** is also piloting MasteryGuide’s math testlets in Louisiana. The state piloted MasteryGuide in grades 5 and 7 during SY 2022-23 and in grades 3, 5, 6, and 7 during SY 2023-24. Louisiana is continuing the pilot in SY 2024-25.

*“These are really hard, consistent, entrenched challenges that truly need a systems-wide solution.”*  
 — *Sensemaking Sessions, Spring 2004*





- + **NWEA** developed a curriculum-relevant assessment model that draws on the most-used ELA curricula in Louisiana. The assessment was piloted in Louisiana during SY 2023-2024 to understand the feasibility of the model as the state determines the next steps for its Innovative Assessment Pilot. Louisiana is the only state in the country testing a curriculum-aligned through-year model (versus a model that aligns to multiple local scope and sequences).
- + **Cognia** (formerly CenterPoint) completed an analysis of data from their Illustrative Mathematics interim assessments administered in two districts in Maryland and Wisconsin to determine the feasibility of using three interim results to calculate a single summative score for a student. Cognia engaged educators in design interviews and a psychometric advisory group to identify a path for how the existing interim design could be used or adapted to predict or certify achievement of a state's annual academic goals.

In addition to private funding, Education First provided intensive technical assistance and grant-writing support to six SEAs to access federal grants, which provide an essential source of funding to cover the considerable costs associated with the design and implementation of new assessments. The six SEAs submitted a total of seven applications for the U.S. Department of Education's Competitive Grants for State Assessment (CGSA) in 2022 and 2024, each focused on the development and implementation of through-year assessments.

Two organizations have developed **innovative science assessments** with the shared goals of 1) more closely aligning science assessments with high-quality curriculum and 2) empowering science educators to adjust their instructional practice based on actionable insights.

- **The Learning Policy Institute** (LPI) supports states as they build and prototype instructionally relevant assessment systems in science. Their efforts have focused on developing high-quality, curriculum-anchored performance assessments that center authentic scientific sensemaking along with other deeper learning and 21st century skills, such as collaboration and problem-solving, that are





# EXPLORATIONS & ACCOMPLISHMENTS

embedded in state science standards. The assessments are designed to be used coherently with the curriculum, including high-quality instructional materials like OpenSciEd (OSE). And, over time, the designs are intended to make a meaningful change to a state’s science assessment system, including scores on the state assessment.

- **Massachusetts’ State Department of Elementary and Secondary Education** (DESE) received a planning and pilot grant from Education First’s Innovations in Assessment and New Measures Program and a 2020 Competitive Grant for State Assessment (CGSA) to research and develop a new science assessment that encourages equitable access to deep learning experiences that prepare students for success in and beyond school. The Innovative Science Assessment (ISA) includes computer-based simulation tasks that ask students to apply scientific skills to complex, real-world scenarios.

## IMPROVING THE QUALITY AND AVAILABILITY OF FORMATIVE AND INTERIM ASSESSMENTS

**Cognia** is working with a group of districts and states to explore innovations in formative and interim assessments. This organization aims to address a need among educators for more reliable and easier ways to gather quality, real-time data to guide instructional decisions and a need for quality interim assessments in science.

- **Cognia** created a vision and plan for an Assessment Hub to help educators make more equitable and effective instructional decisions that enhance student learning. Additionally, the exploration of Artificial Intelligence (AI) was conducted to determine efficiencies for the

Assessment Hub. Serving as a one-stop shop for districts, the Assessment Hub will offer shared, aligned assessment items and forms, enabling inter-school and inter-district progress monitoring and providing actionable data for informed and targeted instructional decisions and planning.

- + The Assessment Hub will include over 20,000 high-quality items, assessment forms, model test blueprints, assessment design support services and professional learning support for analyzing assessment data.

- **Cognia** has also developed and launched interim assessments aligned with the OpenSciEd curriculum. The assessments are composed of performance tasks that incorporate critical thinking and problem-solving skills and that authentically assess disciplinary core ideas, cross-cutting concepts, and science and engineering practices. The goal of these assessments is to empower science educators to adjust their instructional practice with actionable insights aligned with their curriculum and standards.

- + Cognia has completed the first-year pilot of the new interim science assessments in 25 middle schools in six states.



.....  
*“The pace of innovation is much quicker than practice.”*  
— *Grantee Sensemaking Sessions, Spring 2004*  
.....





## DEMONSTRATING DEEPER LEARNING

The education field is evolving in its approach to defining 21st century skills—also known as future skills, durable skills, or deeper learning skills—that are essential for success in school and beyond by deepening our understanding of how these skills develop, how they should be taught and how they can be effectively measured. Several organizations are creating assessment approaches to support students in demonstrating their learning and are evaluating an expanded set of learning outcomes including measures of college and career readiness and 21st century skills.



- **The New Mexico Public Education Department** (NM PED) and **Future Focused Education** received a planning and pilot grant from Education First’s Innovations in Assessment and New Measures Grant Program to engage stakeholders and explore a high school assessment design that would nurture students’ cultural and linguistic strengths while providing valuable feedback that supports students to take ownership of their learning, build strong identities and envision a rich future. The state developed a statewide Profile of a Graduate, which defines essential skills and attributes that all graduates in the state should demonstrate. Local systems can then design their own processes for how students can demonstrate competency via a capstone project. A subsequent grant supported PED to prototype and pilot capstone demonstrations as a graduation pathway. This effort addresses a landmark court ruling ordering New Mexico to meet the needs of all students, particularly students who are Native American, have disabilities, are experiencing poverty or are English-language learners.



- State accountability systems often lack the infrastructure to scale competency-based assessments, particularly in terms of technical knowledge (e.g., how to read and compare these assessments) and perceived inapplicability for college admissions and placement or their compatibility with institutes of higher education (IHEs). **Mastery Transcript Consortium** (MTC) is addressing both of these challenges: the technical component and the systems-level alignment to IHEs in order to implement competency-based assessments in Utah. MTC is developing competency-based “master learning records” as a valid alternative for college admission in Utah. MTC piloted with a cohort of school districts; provided training to high school educators and higher education partners in understanding and using mastery learning records; and developed a framework to support coherent implementation across institutions.
  - + Four of seven pilot schools have already expanded the number of records issued. For SY 2023-2024, 43 students will be issued a mastery learning record.
- **One Generation** developed Mission-Aligned Stories and Profiles, a process for assessing graduating students that is anchored in Indigenous practices of storytelling and that draws on “street data,” such as observations, artifacts and deep listening. Students use the collected data to produce a graduate profile and an internship/capstone summary that demonstrates their mastery of locally prioritized skills and competencies.
  - + The Mission-Aligned Stories and Profiles approach is being implemented by the Native American Community Academy (NACA) in Albuquerque and across the NACA Inspired Schools Network.

- **Summit Public Schools** received a planning and pilot grant from Education First’s Innovations in Assessment and New Measures Grant Program to design assessments for students in grades 6-12 participating in career-connected learning. The assessment process includes cycles of teacher and student feedback and reflection on students’ demonstration of professional skills related to self-direction, curiosity and sense of purpose.
  - + The assessment model was piloted as part of Summit’s Expeditions Program, a career-based learning credit-bearing course that students engage in starting in grade 6.



.....

*“We keep finding tension between reducing the footprint of the test and getting more and better information from the test. That tension is difficult to resolve.”*  
— *Sensemaking Sessions, Spring 2004*

.....





## WHAT SHOULD WE MEASURE TO BETTER UNDERSTAND STUDENT, SCHOOL AND COMMUNITY PROGRESS?



**Many organizations generally agree that K12 systems and communities need better information about students' learning environments and data about students' academic learning.**



**There are three areas in particular where additional measures and research are needed:**

- States and communities need more comprehensive and holistic ways to evaluate schools.
- Educators need tools to measure and support the development of skills and competencies that contribute to student success.
- Policymakers and system leaders need tools to measure contextual factors that affect student outcomes and research about which of these factors matters most to students' experiences and outcomes.

Several organizations have investigated a variety of solutions to address these needs, and as a result of their efforts, significant progress has been made in two areas in particular:

- Measuring student wellbeing, learning environments and community context.
- Understanding expanded measures' relationship to student success.

Overall, many organizations' work and accomplishments in these areas reflect the nascent state of the field and the knowledge base in this area. Featured efforts were largely exploratory and intended to develop proofs of concept that could inform future grantmaking, research and development.

## MEASURING STUDENT WELLBEING, LEARNING ENVIRONMENTS AND COMMUNITY CONTEXT

Many organizations agree that summative tests of student learning alone are inadequate to measure school quality or learning access and often can play an outsized role in current school accountability systems. Several organizations are working to develop tools that capture a broader set of individual factors and environmental conditions that influence student success. With more expansive measures and tools, they hope to provide schools and communities with actionable data they can use to hone their school improvement strategies, inform staffing and other resource decisions, and tackle disparities in access to the opportunities and conditions that support student success.

Several organizations identified more holistic measures of students' wellbeing and their learning contexts.

- **The Choice-Filled Lives Network** (CLN) is helping schools and school systems redefine the concepts of "success" and "thriving" by developing a set of indicators and an accreditation process that is anchored in social determinants of health, the science of learning and human development, and liberatory practices. Schools can use the accompanying rubrics and self-assessment modules to evaluate themselves along three domains: Human Flourishing, Language & Literacy, and Democracy.



# EXPLORATIONS & ACCOMPLISHMENTS

- **Community Responsive Education** (CRE) received a grant to develop, test and validate a Youth Wellness Index and accompanying implementation resources. The index can be used to measure classroom and school impact on the overall wellness of children and adolescents with particular attention to students of color and low-income students. The CRE team has developed the Youth Wellness Index Questionnaire and is awaiting Institutional Review Board approval to test it with youth.
- While it is understood that a successful transition to adulthood requires learning particular mindsets and skillsets, it is not yet fully known how to equip young people with such capabilities, nor how to do so at scale. **Duckworth Lab** at the University of Pennsylvania developed and validated the Necessities Index, an assessment of the conditions required for adolescents to thrive socially, emotionally and academically. The team has also developed, scaled and evaluated Grit Lab 101, a program designed to strengthen adolescents' skills and mindsets related to perseverance in order to support their achievement of long-term goals. The team has concluded that psycho-educational interventions, under certain conditions, might be effective in equipping students with adaptive mindsets
- Under the direction of Dr. Christina Cipriano, **the Education Collaboratory at Yale** is identifying promising practices for inclusive and equitable implementation and evaluation of SEL in school settings; undertaking critical evidence synthesis; and supporting the next generation of data practices through novel SEL assessments and community-based approaches to intervention science. The Education Collaboratory at Yale worked in partnership with school communities nationwide to design innovative assessments of SEL in schools.





**A second group of organizations is creating tools to assess students’ learning environments and their larger school or community context, including tools designed to evaluate equitable access and opportunity to the conditions that support learning.**

- Effective Diversity, Equity and Inclusion (DEI) in K12 schools requires mutual accountability and sustainable change. Organizations need a way to effectively assess their own equitable practices and meaningfully plan for action. **Beloved Community** created Awa, a tool that aims to empower teams to collect data, reflect and plan actions that advance DEI goals. This work led to the creation of the first virtual DEI assessment for the workplace with an emphasis on mutual accountability. To date, more than 500 organizational accounts have utilized the Awa audit tool.
- **Equal Opportunity Schools** (EOS) has partnered with more than 400 high schools to provide data, insights, and year-round support to ensure that all students have equal access to advanced academic programs like AP, IB, and dual enrollment – and thrive once enrolled. More than two million students have been surveyed by EOS, generating information beyond GPA and test scores that matter for students’ success.
- Parents value what they hear from others and are getting more interested and involved in what is happening in schools. **GreatSchools** refined its school quality framework with new data points that aim to capture parents’ interests and expand the role for community voices. Using crowdsourced responses, GreatSchools aims to get broader awareness of what matters to parents and improve the feedback loop between parents and the system as a whole.

- **KIPP Public Schools** conducted research on measuring joyful, identity-affirming, academically excellent schools where students can leave prepared to thrive in their chosen paths. KIPP subsequently prototyped and developed KIPP 360, a school culture assessment tool to “measure what matters,” including by focusing on positive outcomes, prioritizing the perspectives and experiences of end-users, and establishing metrics that support the holistic development and wellbeing of BIPOC students.
- **The Stanford d.school’s K12 Lab** explored how the concept of “positive deviance” (looking at positive outliers) might complement school measurement practices, helping schools solve seemingly intractable problems by looking for positive outliers or “bright spots” within their communities that suggest solutions that can be applied more equitably. The team developed a 10-week virtual professional learning fellowship to test prototypes and collected the resulting resources in a free, self-guided Positive Deviance Toolkit for Educators. They explored ways to make the toolkit and process even more accessible, designing multiple pathways through the process, and creating the Seeking Bright Spots website.



*“We’ve been working on understanding what the measures that matter to communities and schools are ...and, in our experience, what we’re finding is that no one disagrees on the traditional academic indicators. What people are saying is that in order to get to those you also need to address the social emotional ones, the sense of belonging and purpose. The approach needs to be more adaptive.”*  
— Sensemaking Sessions, Spring 2004





- **Village of Wisdom** (VOW) developed the Culturally Affirming Climate Survey for grades 3-12. The survey captures seven indicators of a culturally affirming learning climate: growth mindset, interest awareness, multicultural navigation, racial identity, affirmation, selective trust, social justice and discrimination. VOW also created digital toolkits to support parents and educators in providing culturally affirming learning environments and instruction; the toolkits were developed through a community-driven and participatory design process in partnership with Black parents and teachers. VoW supports school systems to strengthen teacher’s pedagogical strategies in each of the six areas measured through the Culturally Affirming Climate Survey to support creating more culturally affirming classrooms and schools.

## UNDERSTANDING EXPANDED MEASURES’ RELATIONSHIP TO STUDENT SUCCESS

Several organizations are conducting research to understand how expanded measures of student learning and school quality can be used to influence student success. These organizations seek to address several gaps in the existing knowledge base, including:

- Evidence linking measures of student wellbeing and learning conditions to long-term student success.
- Greater understanding of the contextual factors that contribute to the disparities experienced by students of color and students from low-income families.
- Identification of which measures of student success are most meaningful to individual school communities.
- Deeper understanding of how measures of students’ non-academic competencies and skills can be used to predict (and eventually support) their academic achievement.



Four examples of organizations that have undertaken studies in this area include:

- **Achievement Network** (ANet) is exploring how constructs of social and emotional learning (SEL) relate to academic achievement. The Empowering Learning Environments project aims to demonstrate how improvements on one or more SEL constructs (self-efficacy, student voice, belonging and identity affirmation) lead to increased student performance on math and English language arts assessments. ANet selected previously developed instruments to measure each of the four constructs and embedded the measures into its assessment delivery platform for participating schools.
- **Digital Promise** is piloting MindPrint Learning, a new tool that aims to show students how they learn best, and help teachers and students use personalized strategy recommendations in reading, math and study skills. This tool is based on Digital Promise’s previously developed MindPrint assessment: a valid, reliable assessment of cognitive skills (complex reasoning, executive functions, memory, processing). The new research will identify learning strategies that students can use, teachers can support and families can reinforce to build student and teacher efficacy and, ultimately, improve academic outcomes.
- **Education First** documented states’ and local communities’ use of student success indicators—data points that contextualize student outcomes and can be used to highlight disparities in access to learning opportunities. An initial scan identified three categories of indicators being used in different states and communities: outcomes (e.g., kindergarten readiness, on-track course completion), access (e.g., qualified teachers, high-quality instructional materials,

classroom environment) and context (e.g., neighborhood safety, healthcare, family assets). The team examined indicator models in use in three regions: Illinois’ 5Essentials Survey, Indiana’s Graduates Prepared to Succeed (GPS) Dashboard, and Tulsa’s Child Equity Index.



.....

*“A lot of these ideas might take some time to bear out — particularly if they’re scalable.”*  
— *Sensemaking Sessions, Spring 2004*

.....

- **MIT Blueprint Labs** is conducting research to better understand non-test score measures of student success. The researchers seek to understand whether non-test measures are more predictive of success than traditional test score measures and how “effective” schools compare on non-test measures. Though this project is still in progress, MIT’s past work suggests that:





## HOW CAN SYSTEMS OF ACCOUNTABILITY BUILD TRUST AND TRANSPARENCY AND DRIVE IMPROVEMENT?



**Many organizations have surfaced challenges with federal, state and local accountability systems that they are eager to address.**



**There is a general sense among many organizations that the current generation of accountability systems are not leading to improvements in education quality for every student and that the systems fail certain student groups in particular.**

Many express concern that there is limited stakeholder input in the design of accountability systems and a disconnect between those systems and the information that stakeholders and school system leaders need to support improvement. They also note incoherence between state and local systems of accountability and among the organizations seeking to improve accountability systems.

Some organizations are eager to improve how schools are evaluated within state and federal accountability systems to better inform resource allocation and to hold schools accountable for providing high-quality learning experiences that improve student outcomes. Recommendations for how to make this possible vary across the field and there is tension among advocates for more autonomy, flexibility, support or consequences resulting from accountability systems. Some organizations would like to see more states implement A-F grading systems for schools. Others would like to see changes to state policy to ensure that low-performing schools are consistently identified and receive adequate resources and to prioritize state funding based on student needs and learning outcomes. Others would like to see federal requirements stripped down and providing more room for states and local systems to design models that are more closely aligned to their local and community goals.

Several organizations want to see additional measures included in state and federal accountability systems to provide more comprehensive information about student achievement

and growth. Of these organizations, some want to see additional measures of academic success, while others would like to expand expectations beyond test proficiency academic success for a greater emphasis on access measures and 21st century skills. Some recommend the inclusion of college and career readiness indicators in order to hold schools accountable for ensuring students are prepared for school, work and life.

Organizations who explored policy and accountability change tackled four areas in particular:

- Exploring the needs of stakeholders to inform future systems of accountability.
- Rethinking state and local accountability.
- Evaluating the intentions and impact of federal policy.
- Advancing new policy ideas and thought leadership.





## EXPLORING THE NEEDS OF STAKEHOLDERS TO INFORM FUTURE SYSTEMS OF ACCOUNTABILITY

Organizations engaged a wide variety of stakeholders, including students, parents, teachers, school and system leaders, policymakers, employers and more. As they developed new policy directions, products, tools, assessments and systems, almost all engaged stakeholders to understand their needs, inform their design processes and to increase stakeholder buy-in. Many engaged stakeholders through surveys, focus groups, polls, interviews, empathy research or co-design processes.

Many organizations found widespread support among families, educators and system leaders for maintaining annual, transparent and disaggregated data to identify and support struggling schools and historically marginalized and underserved students. There have been some meaningful improvements over the last 20 years of assessment and accountability policy that are worth celebrating and learning from. At the same time, across organizations’ engagement efforts, stakeholders were concerned about test anxiety for students, pressures on educators to teach to the test, bias in assessment design, and concerns about representation of multilingual learners and students with disabilities. Stakeholders also raised concerns about accountability determinations negatively impacting student resources and supports and how students and their schools are perceived. Across efforts, many also cited poor communication of the purpose, implications and results of assessments to parents and families.

*“We still don’t have data on the impact of new accountability measures and designs. We need examples to study and research to illustrate the shifts that come with these changes. We need to keep building proof points and creating a broader set of measures to evaluate their impact.”*  
 — Sensemaking Sessions, Spring 2024

The work of organizations in this area is ongoing and will require sustained effort to address the tensions between policy and implementation—particularly aligning the aspirations and purpose of summative tests with the need to rightsize their role within the education system.



We highlight several of organizations’ efforts below to show the range of perspectives and stakeholders engaged.

- **Education First’s** Measurement for Families research investigated what parents and caregivers want to know about their children’s academic, social and emotional developmental progress and success. The study found that families want a wide range of information about how students are progressing in school (e.g., what their children should be learning, where their children need extra help, etc) and how schools support their learning (e.g., how well the school is monitoring and supporting their children’s mental health, how well schools and teachers engage parents and families, etc).
- **EdTrust** engaged a variety of stakeholders in their research and advocacy. For example, for their recent Future of Assessments publication, the EdTrust spoke to stakeholders who are often underserved or who work in a school or district in which the majority of students are underserved. The EdTrust found that stakeholders currently use, or want to use, summative assessments for different purposes, and many expressed confusion or frustration about how assessments are used. These stakeholders noted that education systems often fall short when it comes to using assessment systems to allocate resources and support to the schools that need them most. All stakeholder groups said that they would like to see better follow-through on resource allocation.
- **GovLab** engaged 120 experts from 15 countries to source their recommendations. These individuals had expertise in a variety of fields, including assessment, measurement, psychometrics, community engagement, economic mobility, labor and workforce development,





policy, computer science, artificial intelligence, machine learning and virtual and augmented reality. The experts' suggestions varied; two examples relevant to assessments and accountability include: 1) a proposal to fund programs, tools and projects to identify comprehensive career pathways (e.g., skills libraries, digital credentials and education/career decision-making tools), and 2) a proposal to expand administrative data infrastructure to share and link assessment data at national, state and local levels to foster the evaluation of new assessments and better understand mobility and other outcomes.

- Latinos for Education (L4E)** engaged Latino parents, educators and nonprofit leaders to better understand how these stakeholders view the role of assessments and accountability in the public education system. L4E found that Latinos (and Latino parents and guardians in particular) overwhelmingly support assessments and agree that they can be useful in understanding student outcomes and ability. They also determined that Latino parents and families, especially those who are monolingual, are most in need of support related to assessments and accountability as nearly one in ten parents were unable to understand the most important information about their children's standardized tests. L4E recommends building more capacity to collect and interpret data and more capacity to disseminate the information in language that is accessible to different stakeholder groups.
- The National Center for Learning Disabilities (NCLD)** engaged caregivers and educators of students with disabilities for Measuring and Mobilizing for Success in the 21st Century to examine their beliefs about assessments and accountability. NCLD found that these stakeholders predominantly believe in the value of state standardized assessments and that those assessments provide important information to compare their child's performance in school. Based on this stakeholder engagement, NCLD made several recommendations to the federal government to preserve the requirement that states must administer assessments that allow stakeholders to compare groups of students to grade-level performance targets and to states and districts to bring together stakeholders to refine assessment systems and make them more accessible and inclusive.
- The National Urban League (NUL)** and **UnidosUS (UUS)** collaborated on the Future of Assessment and Accountability (FOAA) Project. NUL and UUS engaged over 250 stakeholders through focus groups, interviews and roundtable discussions. These stakeholders represented a wide variety of groups, including Black and brown students, parents and guardians, teachers, youth development staff and leaders, high school and college admissions counselors, assessment directors, state



board of education members, African-American researchers, education equity leaders and civil rights leaders. As a result of all stakeholder engagements, UnidosUS and NUL identified several principles to guide their future work including: broadening definitions of success; ensuring education indicators and assessments are grounded in continuous improvement and accountability; strengthening system support to enhance shared accountability that centers equity and promotes transparency and continuous, targeted improvement; and providing historically marginalized communities, families and youth a greater voice and ownership in assessment and accountability. NUL and UUS will be developing policy recommendations based on these principles.

- **Teach Plus** engages a diverse group of outstanding educators across the nation in their research and advocacy. For the Phoenix Project, which outlines teachers’ blueprint for change to build an equitable education system, Teach Plus engaged 175 educators across 30 states. Based on this stakeholder engagement, Teach Plus reports that teachers believe that 1) tests should be shorter, more frequent and offered in different formats and 2) tests should be standards-aligned and measure critical thinking skills. Teachers also recommend reinventing assessment to advance excellence in equity by measuring what matters (including critical thinking and standards), taking as little time away from instruction as possible and providing data in a format that teachers and families can easily understand.

## RETHINKING STATE AND LOCAL ACCOUNTABILITY

Some organizations have started to prototype and pilot new ways to support transparency, enable community participation and inform local and state accountability system design. These organizations have focused on designing accountability systems that center the needs of stakeholders, particularly families, in accountability and communication systems, communicating information more effectively and providing more meaningful and actionable information about student learning, achievement and growth.

- **KnowledgeWorks** and the **Center for Innovation in Education** are working to build a more coherent and inclusive state accountability system in Kentucky.
- Kentucky’s Department of Education (KDE) seeks to create more coherence between state and local systems of accountability and more alignment between the state accountability systems and what students, families, teachers and communities want to know about school quality. KDE received a 2022 Competitive Grant for State Assessment federal grant to convene stakeholders as part of designing a new accountability system. A private grant to KnowledgeWorks helped bolster KDE’s policy capacity by funding an opportunity analysis of the state’s policy system, an innovation guide to help districts maximize the current



*“We should think about ways to connect the work emerging in the field to the federal conversations. The federal community needs to learn from state and local examples, but there is a bit of a wall between those worlds right now. We need an active learning agenda to inform the next ESEA reauthorization.”*  
 — *Sensemaking Sessions, Spring 2024*

policy environment, and a forthcoming shared policy agenda for the proposed system. The grant also enabled KnowledgeWorks in partnership with the Center for Innovation in Education to bolster the capacity of local Kentucky organizations to participate in aligned storytelling and community engagement. KDE’s proposed system redesign includes four key features: the implementation of an innovative governance structure that supports state and local system co-creation, resulting in a “system of systems” model that is vertically coherent; “anchor competencies” that outline what students across the state should be able to do by the time they graduate; a state-wide Portrait of a Graduate that is inspired by the anchor competencies;



and an intentional structure for sharing local insights, learning alongside districts and evaluating how the state system can support innovation at scale. After a study phase with the field exploring several options, KDE is expected to make recommendations in 2025 to the legislature for any changes to the state accountability system inspired by locally-developed models. Lawmakers would tackle the proposed changes in the 2026 legislative session. KDE intends for the new state system to be inspired by and in support of local efforts to design meaningful systems of accountability which include:

- + One district developing measures of quality focused on growth, student agency, student assessment and measures of student progress in local competency.
- + Another district developing a defense of learning process with evidence of portrait of a graduate competency and a postsecondary plan
- + Another district developing a quarterly accountability dashboard that reports student success, staff support and competency, community engagement and quality operations and facilities. Includes collection of student artifacts and presentations aligned to local competencies.

**Another organization is focused on** developing more equitable and actionable accountability systems that anchor on racial equity as a primary goal in partnership with local school districts.

- **The Center for Youth & Community Leadership** (CYCLE) at Roger Williams University has piloted and implemented the Schools and Communities Organizing for Racial Equity (SCORE) model in Providence, Central Falls, and Newport, Rhode Island. SCORE is an intergenerational community research model through which a team of students and caregivers identifies community priorities for education and racial equity, identifies measures to capture a school or district's progress addressing these priorities, develops a local SCOREcard to communicate priorities, and tracks these measures in partnership with local education agencies. The goal is to create community-driven and equity-centered local accountability systems that provide stakeholders with data depicting a more holistic picture of student and school success. Following the pilot, CYCLE intends





to support adaptations of the SCORE process in additional communities. One such adaptation is underway in Manchester, Connecticut.

## EVALUATING THE INTENTIONS AND IMPACT OF FEDERAL POLICY

The Every Student Succeeds Act (ESSA) outlines requirements for school identification, improvement and funding processes. Compared to its predecessor No Child Left Behind (NCLB), ESSA allowed states more control to set their own process for these practices. In addition to requirements for school improvement, ESSA also outlines expectations for statewide assessment, assessment innovations and important guardrails for ensuring all students, including students with disabilities and English learners are included and supported appropriately. Now nearly 10 years after ESSA was enacted, and given the rapidly changing context of school systems in light of the pandemic and evolutions in technology, several organizations have taken the opportunity to reflect on and explore the ways in which the intent of the law is aligned with its impact. They are also beginning to identify opportunities to clarify, revise, or provide additional guidance to better meet the needs of students, families, school systems, and policymakers.

- **The U.S. Chamber of Commerce Foundation** conducted quantitative and qualitative reviews of the past 20 years of K-12 education reform to understand what has and has not worked. The Chamber Foundation also launched its Future of Data Design Challenge to field ideas from the brightest minds in K-12 education to see how they are viewing the current policy landscape and to understand the problems they face, identify changes they would like to see, and propose how changes could be implemented. The Chamber Foundation meta-analysis report highlights key insights from the past 20 years of K12 assessment and accountability policy, including:

- **All4Ed** has focused on analyzing the realities of how states have implemented ESSA, how that implementation has driven spending and resource allocation and how those policies have impacted education equity. All4Ed has also made next-generation accountability systems one of the pillars in its newly launched State Policy Center, including three pieces of model legislation for state policymakers based on its policy research and recommendations. Some of the key insights surfaced by All4Ed include:



## ADVANCING NEW POLICY IDEAS AND THOUGHT LEADERSHIP

During the height of the COVID-19 pandemic, advocates worked to ensure continued use and protection of statewide summative assessments amid opt-out movements and calls to eliminate or suspend their use in SY 2021-2022 and beyond. Many of these organizations wanted to maintain the use of statewide assessments as an important tool to help schools, policymakers, educators and parents monitor student learning, allocate resources, and identify schools in need of additional support at a critical time for communities across the country.

During the pandemic, many organizations and their stakeholders believed it critical to continue to collect data on student performance to track the pandemic’s impact on student learning, particularly for students from historically marginalized groups. While this moment highlighted the need to defend statewide assessments, several organizations noted that at the same time, the “accountability pause” in many states and resulting conversations around assessments created an opportunity to reevaluate the purpose of statewide summative assessments and address longstanding issues with assessments and accountability systems. Prior to and during the pandemic, these organizations each offered new insights and advocated for various recommendations related to longstanding issues in assessments.



- **ExcelinEd** has supported 27 states in various capacities—including serving on technical advisory committees (TAC) and task forces, as well as advising state boards, state education agencies, legislatures, and state-level policy and advocacy organizations. The organization has championed states implementing A-F grading systems for schools and reinventing school report cards to empower families by helping them understand school data, make informed choices and engage with schools to discuss academic achievement. They have also supported states to have fewer but better tests with a goal of ensuring assessments serving the purpose of measuring student achievement and providing actionable results.
- **Migration Policy Institute** (MPI) research, policy analysis, and ongoing stakeholder engagement on assessment and accountability issues indicate agreement across English Learner (EL) stakeholder groups that policy shifts are needed to more (1) clearly define EL subgroups; (2) improve assessment reporting and communication for families and communities; (3) improve content assessments for ELs; (4) accelerate research on effective tools and practices for assessing young ELs (PreK-2); and (5) refine accountability systems for more nuanced understandings of EL student outcomes.
- **Education Reform Now** (ERN) advanced several priorities related to assessment and accountability over the past five years. They have worked to dispel misinformation about annual, summative assessments and to push states to make data available in timely, accessible, and interpretable ways. ERN has also championed the importance of statewide accountability, school improvement and public reporting systems and the crucial role of assessment data as a necessary tool to allow leaders to identify the districts, schools and students that require differentiated and additional supplemental resources. ERN was a key leader in bringing to bear the January 2024 US Government Accountability Office report on enhancements needed to school improvement oversight. They have also investigated high-performing, high-poverty

schools through their Spotlight Schools series to facilitate knowledge transfer of what works and build a research foundation for robust accountability and improvement agendas. At the state level, ERN has served as a convener of the Voices for Academic Equity Coalition focused on defending the Massachusetts Comprehensive Assessment System.

- **The Thomas B. Fordham Institute's** priorities have included strengthening and defending results-based accountability systems and forming bipartisan coalitions to improve student achievement in the wake of the Covid-19 pandemic. Through thought leadership and advocacy, Fordham has engaged education practitioners and advocacy organizations from left, right and center with a focus on defending and improving results-based accountability and leading bipartisan reform and recovery in the wake of COVID-19. They've championed giving families information, power, and agency to understand, support, choose and advocate for their children's education and are beginning work to support broadening definitions of student success, including new measures focused on attendance, high school and middle school readiness.





*“We are trying to make assessments more equitable and better serve students. Policies and research requirements are holding our progress in place. Can we break that stranglehold?”*

— Grantee Sensemaking, Spring 2024

- Since 2022, **Education First** has led a Learning Network of advocacy organizations to share insights, engage in dialogue on key issues related to the future of assessment and accountability and elevate opportunities for partnership and collaboration to move the field in the coming years. The network is rebuilding a coalition of policy and advocacy organizations focused on issues of assessment and accountability; elevating shared learnings, constituent needs and interests; and developing policy recommendations to inform future directions across the field and implications for future authorizations of ESEA.
- + The network convenes 15 advocacy organizations regularly and has provided recommendations to the US Department of Education on a broad range of issues, including changes to the Innovative Assessment Demonstration Authority and Competitive Grants for State Assessment.







## HOW CAN DATA, **KNOWLEDGE** AND IDEAS BE SHARED TO ADVANCE CHANGE?



## Many organizations have worked to improve how assessment data and research are used to advance change.



**Organizations have focused on establishing a more robust research infrastructure, creating information-sharing mechanisms to bridge the gap between policy and practice, and supporting the information needs of various stakeholders.**

We feature examples of how several organizations have explored solutions to building and sharing knowledge about assessment innovation, and their work falls into several broad categories:

- Improving communication infrastructure for families.
- Supporting the creation and dissemination of new research.
- Diversifying the psychometrician talent pipeline and challenging technical requirements.

### IMPROVING COMMUNICATION INFRASTRUCTURE FOR FAMILIES

Many organizations want families to be empowered with data to support and advocate for students and hold schools and systems accountable. Their efforts aim to ensure families have access to specific, actionable data about student learning and that the data they receive is clearly communicated, delivered with a clear purpose or presented in a user-friendly manner. Some of the barriers to effective, equitable family engagement with assessments and data, include time, access to technology and language differences.

In order to address these needs, several organizations explored a variety of ways to communicate data more effectively to families and communities, looking not just at the data themselves but also the methods of delivery and the actions families can take based on that information.

- **The Collaborative for Student Success** (CSS) has worked to increase transparency and accessibility of information to support a broad range of stakeholders in understanding how federal COVID-19 relief stimulus funds were used by districts across the country; and to track and display statewide annual assessment data including adherence to key provisions of federal law. CSS also tracked requests by states to the US Department of Education to waive certain assessment requirements. CSS's user-friendly platforms and data tools allow stakeholders to access annual statewide assessment information in one place and track changes over time across the country.

Other organizations also worked to understand the needs of and develop tools that support educators and families when engaging with data.

- **LearningHeroes** has developed family engagement tools, resources and training to help strengthen partnership between homes and schools rooted in trust and based on a shared and accurate understanding of student data and progress. As part of their grant, Learning Heroes piloted its Parent-Teacher Planning Tool at a DC Charter School, helped customize the tool, and determined whether, and how, the tool can change parent understanding and actions related



to their children’s achievement and development. During the pilot, Learning Heroes helped strengthen the structure of parent-teacher conversations and supported more candid and actionable conversations about student data.

- ✦ The tool and support for staff enhanced the quality of parent-teacher conferences with parents reporting that the two-way conversation prompted by the tool was helpful and the flow provided detailed information and example data to help them understand their child’s progress. Additionally, school leadership and teachers reported the tool was the first of its kind for the school in providing a consistent and meaningful way of sharing data for each student and organizing parent-teacher communication.
- **TalkingPoints** is building a family engagement platform that facilitates conversations between parents and educators to improve student outcomes. The platform was developed based on analysis of more than 40 million home-school conversations that surfaced insights into how schools and districts can prioritize communication with families, technology that supports equitable and effective school-family communication and the professional development needs of educators for effective family engagement.

✦ The project builds upon third-party research that proved TalkingPoints leads to higher test scores, better grades, and lower absenteeism rates, with gains more pronounced for historically marginalized groups.
- **Cambiar Direct to Families** developed the THRIVE grant program to address the dearth of organizations and models prioritizing the communication of assessment data to students and families. Cambiar aims to build an ecosystem of organizations and resources to bolster family engagement and to increase the quality of engagement. Cambiar provided funding to 30 organizations to develop parent platforms for specific communities and for national use, and to activate parents through workshops, deep dives into their children’s learning profiles



*“Given the range of innovations in assessment and accountability that are being explored, how will we understand what each of us are learning? If there’s a success, how do we transfer that? If some are state specific or even more local, how do we make sure those lessons are learned, scaled and applied?”*

— *Sensemaking Sessions, Spring 2004*





and other unique tools and solutions. For example, Paloma is using artificial intelligence to facilitate and reimagine parent-teacher collaboration, South Bend Indiana’s Empowerment Zone is consolidating communication streams for parents, and Southwest Corridor Solutions is developing success plans that families can use to set annual goals for each child, evaluate their progress and celebrate their success.

- ✚ A total of 31 new family engagement tools, playbooks, and other methodologies were selected to launch or pilot in SY 2023-24 based on previously established performance metrics.

## SUPPORTING THE CREATION AND DISSEMINATION OF NEW RESEARCH

The education field is siloed. Cutting edge researchers, practitioners in school systems and policy makers are often disconnected and there is limited infrastructure to support the management and dissemination of knowledge. Organizations have worked to translate and disseminate research in order to guide decision making among practitioners and policymakers.

Two organizations are working to cultivate more cohesion within the field by building a shared knowledge base about the types of assessment and accountability innovation that are possible, the research that supports them and the policy implications.

- **The Center for Measurement Justice** (CMJ) is a research center dedicated to supporting justice-oriented educational measurement and professionals. CMJ has launched a research center to investigate the impact of assessments that center justice. Journal articles produced so far have covered various aspects of measurement justice and its application, including the recruitment and retention of marginalized graduate students and disrupting inequity and bias in assessment design. Additionally, the center provides assessment companies and developers with technical assistance and support to adopt justice-oriented approaches to measurement.

*“We need to really listen to the voices of the people on the ground. Some of the best research comes from us looking at the needs of the districts and the schools —and getting that information from the people actually working in those systems and places.”*

— Sensemaking Sessions, Spring 2004







- **EduDream** launched the K12 Research for Equity Hub (The Hub), a multi-year initiative generating evidence to advance dialogue on K12 education assessment and accountability systems. The research aims to stimulate new thinking, advance policy conversations, and highlight how various policy ideas and innovations impact proximate stakeholders.

Two organizations are also leveraging competitions to accelerate the creation of new assessment tools and technologies, including technologies that reduce the length and cost of assessments without compromising quality.

- **Georgia State University Research Foundation** (GSU) has created the Open Data for Assessment Fund (ODAF), a project that aims to identify, release and share open assessment datasets to support the creation of new technologies and algorithms that address challenges with existing assessments. The project further seeks to ensure that the datasets are representative of the U.S. student population and responsive to educator and student information needs.
- **The Learning Agency's** Tools Competition aims to generate new tools that address critical assessment challenges, including time and cost. Innovations range from AI-powered scoring and item generation to platforms that offer real-time student performance insights for educators and parents.
- In the second round of the competition, the Learning Agency received 150 proposals, surpassing the target. Ten winners were selected. In all, the competition spurred the development of at least three assessment technologies tools benefiting at least 750,000 students.



## DIVERSIFYING THE PSYCHOMETRICIAN TALENT PIPELINE AND CHALLENGING TECHNICAL REQUIREMENTS

Historically marginalized communities are underrepresented among psychometricians and other roles in assessment development. Many organizations identify this as one reason why assessments often fail to accurately and fairly measure the abilities of all students. The Center for Measurement Justice seeks to solve this inequity by building a more diverse psychometrician pipeline.

- **The Center for Measurement Justice** (CMJ) is working to develop a more diverse psychometrician pipeline by managing and hosting a doctoral fellowship that provides financial and mentoring support to advanced doctoral students. In addition, CMJ launched a youth advisory board composed of high school and undergraduate students with a variety of sociocultural identities, and CMJ sponsors undergraduate BIPOC student interns, providing them with an opportunity to learn about the field of assessment and consider pursuing an advanced degree in the field.

+ To date, CMJ has served more than 144 BIPOC scholars through mentorships, internships, scholarships and doctoral fellowships in the field of psychometrics.

**Many organizations also share concerns** about the ways that technical requirements, especially for high stakes assessments, can stifle innovation. Part of the problem appears to be interpretations of federal requirements and limited perception of what's possible while still meeting those requirements. Some organizations are exploring the technical feasibility of specific solutions, or exploring different ways of approaching technical challenges to enable innovation and overcome barriers.

- **The Center for Assessment** conducted research on how alternatives to annual testing can meet federal school accountability determinations. Specifically, researchers from the Center are

asking: Must states test all students every year to understand how schools are doing and to identify gaps, inequities or lack of opportunities in the education system? Could states test less frequently, with a representative sample of students, and/or on a subset of the content standards (i.e., a shorter test) and achieve the same insights? What are the trade-offs to reduced testing?

- + The Center has found two of the scenarios investigated hold promise for meeting the current intentions of the federal accountability system: Testing every other year and testing all students every year with a shortened test.”
- **The Learning Agency** (TLA) researched new validity approaches, including validation methods that are better tailored to student-centered and competency-based assessment models. So far, TLA has found that experts tend to emphasize traditional validation methods and that there is widespread use of dated statistical models that aren't suited to evaluate newer types of measures. It is more difficult, for example, to measure and validate skills like collaboration and critical thinking, and the most common validity approaches are not well suited to evaluate the accuracy of assessments that aim to measure these skills.
- **Education First** partnered with Foresight Law & Policy to investigate the extent to which the federal peer review process allows for innovation in state summative assessment. The team found that current peer review guidance is designed to favor traditional end-of-year summative assessment models and may not adequately support innovative assessment approaches. Ambiguities in the guidance regarding use of multiple interim-assessments for summative purposes (through-year), alignment to state standards, use of sub-domains and sub-scores, and interpretation of the “same assessment” requirements pose challenges for states seeking to implement innovative assessment models that meet federal accountability standards.







# PART 2: LESSONS LEARNED



The learnings, accomplishments and implications of more than 90 organizations’ efforts and more than \$100 million of private philanthropic investments have impacted communities and K12 systems across the country.

We see clear examples of ways that each of the organizations’ efforts have led to improvements in and availability of enhanced statewide summative models; modernized data systems and infrastructure in service of families and communities; and a robust, diverse and bipartisan advocacy community committed to improving systems of assessment and accountability

The field has better access to better interim and formative products, especially in science, as well as improved tools, research infrastructure and resources to use data more equitably and effectively. National conveners, policymakers and civil rights organizations are also better positioned to advocate for and bring coalitions together to advance new policy ideas.

We also see a fundamental shift in discourse, research, policy and products that have become possible as a result of some organizations’ focus on whole-child principles, community co-creation and expanded definitions of success. Dialogue around the use of expanded measures and honoring local values is more evident across the field and many are bringing forward solutions, ideas and research that challenge the status quo in meaningful and productive ways.

Field building is rarely accomplished in short periods of time—especially when those periods are entirely upended by global health emergencies and shifting political landscapes. It takes committed effort from a diverse set of actors, clear leadership, sustained investment and infrastructure for knowledge building and dissemination. And, while the priorities of the organizations and the foundations we highlight in this report are shifting given emerging needs and changes in the landscape, the work continues. In their reflections about the last five years of effort, many organizations and funders raised parallel lessons learned and challenges.

## CROSS-CUTTING LESSONS LEARNED

Many organizations pointed to several big lessons emerging from their work on assessment and accountability innovation.

*“I’m curious about how all this fits together. We’re each tackling a specific piece of the puzzle, but who is putting all of those pieces together to create a better system?”*  
*— Sensemaking Sessions, Spring 2024*

- The way stakeholder input, roles and expertise are considered in assessment and accountability design has shifted.** All organizations cite authentic community partnership as critical for cultivating buy-in, trust and sustainable solutions in their communities. They found that involving proximate stakeholders (students, families and teachers) as co-creators and designers of assessment innovations is key to successful implementation. The values of organizations featured in this report have resulted in a marked shift in the field in how stakeholder input is considered. This shift represents a departure from prior generations of assessment and accountability design and policy, which many cite as having largely not engaged parents, students or educators authentically and in ongoing ways.



- **The role of caregivers and parents is evolving in the education field. Accurate, accessible data for parents will be necessary to support the next wave of K12 reform.** Parents are core partners in education improvement. For the most part, parents want to know if their kids are learning, happy and safe, but they rarely have access to actionable data that supports these desires. Many organizations believe that the more they can gather and share information that aligns with parents’ interests, the more parents can engage with and support their children. As shifts in policy around the country continue to prioritize parents’ agency and rights as critical cornerstones of the next wave of reform, the work of the organizations and funders highlights the importance of having access to accurate, evidence-based information and accessible data in the hands of parents to inform their decisionmaking.
- **New accountability policies, assessment designs, tools and processes will only be effective if they are implemented with fidelity.** Engaging educators and systems leaders—who are ultimately responsible for the implementation of new policies, tools and systems—is essential to the successful uptake, implementation and scaling of new assessment and accountability innovations. Reflections on the past 20 years of K12 reform in this area point to several implementation pitfalls that have led to mixed outcomes and a rush to abandon different solutions in pursuit of new ones without deeper examination. Many organizations pointed out that those implementing new solutions need to be engaged not only in the development of the solutions but also need to be supported with the capacities necessary for effective implementation.
- **Assessment innovation efforts, particularly those working to develop new products, have to balance supply and demand in the K12 market.** Several developers reflected on lessons learned about the practicality, need, demand and feasibility of the assessment innovations they wished to explore. Many reflected on the considerations for successful uptake and implementation, building market awareness of new tools and ensuring buy-in from those who would be responsible for implementation in the process.

- **The field needs space and incentives for collaboration, dot-connection and coordination.** Many organizations pointed to the need for robust, ongoing and deep cross-sector partnerships that enable their work, especially between school systems, community organizations, research institutions and assessment vendors. These partnerships were critical enabling conditions for many organizations and the sustainability of their efforts.

## CHALLENGES

In their reflections, organizations mainly referenced challenges related to the K12 system’s capacity for change and innovation, challenges with implementation and entrenched mindsets about what our systems of assessment and accountability ought to achieve.

- **Research logistics:** Organizations ran into various logistical hurdles in the research and development process, including finding qualified researchers and other personnel to support their work, navigating data privacy and security concerns, seeking tool validation and ensuring implementation fidelity across pilot sites.

.....

*“School systems have not caught up with the pace of evolutions in technology and often lag behind due to implementation challenges.”*  
*— Sensemaking Sessions, Spring 2024*

.....



- **Communication with stakeholders:** Organizations had to figure out how to talk about multiple measures and systems change with families and other stakeholders and how to effectively communicate somewhat complicated technical information to the same groups.
- **Capacity:** Organizations working on innovations in summative assessments specifically described significant capacity challenges. For states and districts, ongoing pandemic-related disruption and political challenges, as well as competing priorities within their systems, made it challenging to find the capacity to navigate the assessment redesign process and federal requirements, including double testing requirements. Many organizations designing assessments found the process requires a great deal of resources, time and effort to do well and consistently.
- **Mindset shifts:** Organizations found that the education field often has limited incentives for change, which makes the application and uptake of new ideas challenging. They recognize the need for significant mindset shifts at every level—from legislators to state education leadership, educators and communities—to fully embrace innovative approaches to assessment. Some organizations expressed a lack of faith that change efforts will deliver the desired improvements, stemming in part from cyclic innovation efforts that are abandoned in our field and a general sense of fatigue on the heels of several years of challenging local and national education contexts.
- **Misaligned perceptions of federal regulation:** Some organizations developing new assessments perceive that federal regulations constrain their design choices and do not incentivize innovation, especially for summative assessments. In particular, organizations cite the federal peer review processes to be prohibitive, unclear and cumbersome. Others believe

some of these perceptions are remnants of prior federal policy and that current federal statute and regulations provide adequate flexibility to innovate. This misalignment has created tensions and has limited collaborations among various field leaders and organizations.

- **State-level politics:** Often unrelated to assessment and accountability, state-level politics can hinder innovative efforts. High turnover and changes in state leadership; legislature timelines that do not match development timelines; and tensions among state, local and federal roles for school accountability and improvement are among some of the challenges cited. Additionally, culture wars centered on diversity, equity and inclusion (DEI) have made assessment and accountability improvements more difficult for state leaders who are caught in these contentious topics.
- **Changing technology:** Technology enhancements and AI were cited as both an opportunity and a challenge for many organizations. School systems have not caught up with the pace of evolutions in technology and often lag behind due to implementation challenges. Often, the complexity of new algorithms and tools can make them difficult to integrate into existing products and structures.
- **Field fragmentation:** Silos among research, practice and policy make it difficult to align new ideas and develop a field-wide agenda on assessment. Additionally, generalizing and applying research findings to imperfect real-world scenarios can be challenging because research often occurs in a specific, controlled context.





# CONSIDERATIONS FOR THE FUTURE



**Based on the extensive knowledge generated by the organizations featured in this report, Education First offers the following considerations for school system and state leaders, technical assistance partners, developers, researchers, advocates and funders to continue developing the next generations of improved assessment, measures of school quality and system accountability.**

## FOR SCHOOL SYSTEM AND STATE EDUCATION LEADERS:

- Set a clear vision and theory of change for how you want to assess student learning and progress and school quality.**
  - + Articulate a clear vision for how you define school quality and student success and what you are measuring to track progress. This vision must be informed by wide-ranging stakeholder input and aligned with best practices. The vision must also clearly articulate the problems to solve as part of any change effort and what the intended end state would look like for students, teachers and system leaders.
  - + Assess and allocate appropriate capacity before you implement anything new. Identify evidence-based practices, technological advancements and research efforts that could enable continuous improvement and coherence across your systems.
- Plan for transitions early and build internal capacity and buy-in for new solutions beyond cabinet leadership to ensure long-term sustainability.**
  - + Assemble a comprehensive team with diverse, relevant expertise that is dedicated to the planning and implementation of the new system and works collaboratively across the agency and with external partners.
  - + Break down silos within district and state systems, particularly among assessment, accountability, data and improvement departments that are often disconnected and not in lockstep with curriculum and instruction departments.
  - + Manage local and state politics, including addressing the concerns of advocacy organizations, the legislature, the state department of education and the governor’s office. Planning for and building a cadre of political support can help navigate a range of political issues that affect assessment and accountability transitions.
- Ensure educators are authentically informing and participating in research and development efforts, surfacing implementation needs early in order to build adequate buy-in and support the scaling of new solutions.**
  - + Seed demand for innovation. This includes building buy-in with policymakers, educators, students and the community. When states and districts have 1) strong, active engagement and input from stakeholders consistently informing decisionmaking and 2) have a robust network of partnerships ensuring wide support and collaboration, their efforts are more sustainable.
  - + Refine local procurement policies that prohibit open exchange and collaboration between vendors and between vendors and their state or district partners.



## FOR TECHNICAL ASSISTANCE PARTNERS, DEVELOPERS AND RESEARCHERS:

- **Continue to research, develop and scale proof points of broader measures of students' learning environments, context and wellbeing for use in driving school improvement.**

- + ESSA allows states to broaden definitions of school quality and student success beyond test scores by including a School Quality or Student Success (SQSS) indicator. However, few states have fully utilized this provision to its full potential. Most states currently use a college and career readiness indicator at the high school level and chronic absenteeism for grades 3-8 as their SQSS indicator. Researchers, states and their partners should develop, test and scale additional measures that could provide insightful information to schools and states, including measures of belonging, 21st century skills and access to quality rigorous programming.

- **Deepen understanding of school improvement efforts and implementation of evidence-based practices.**

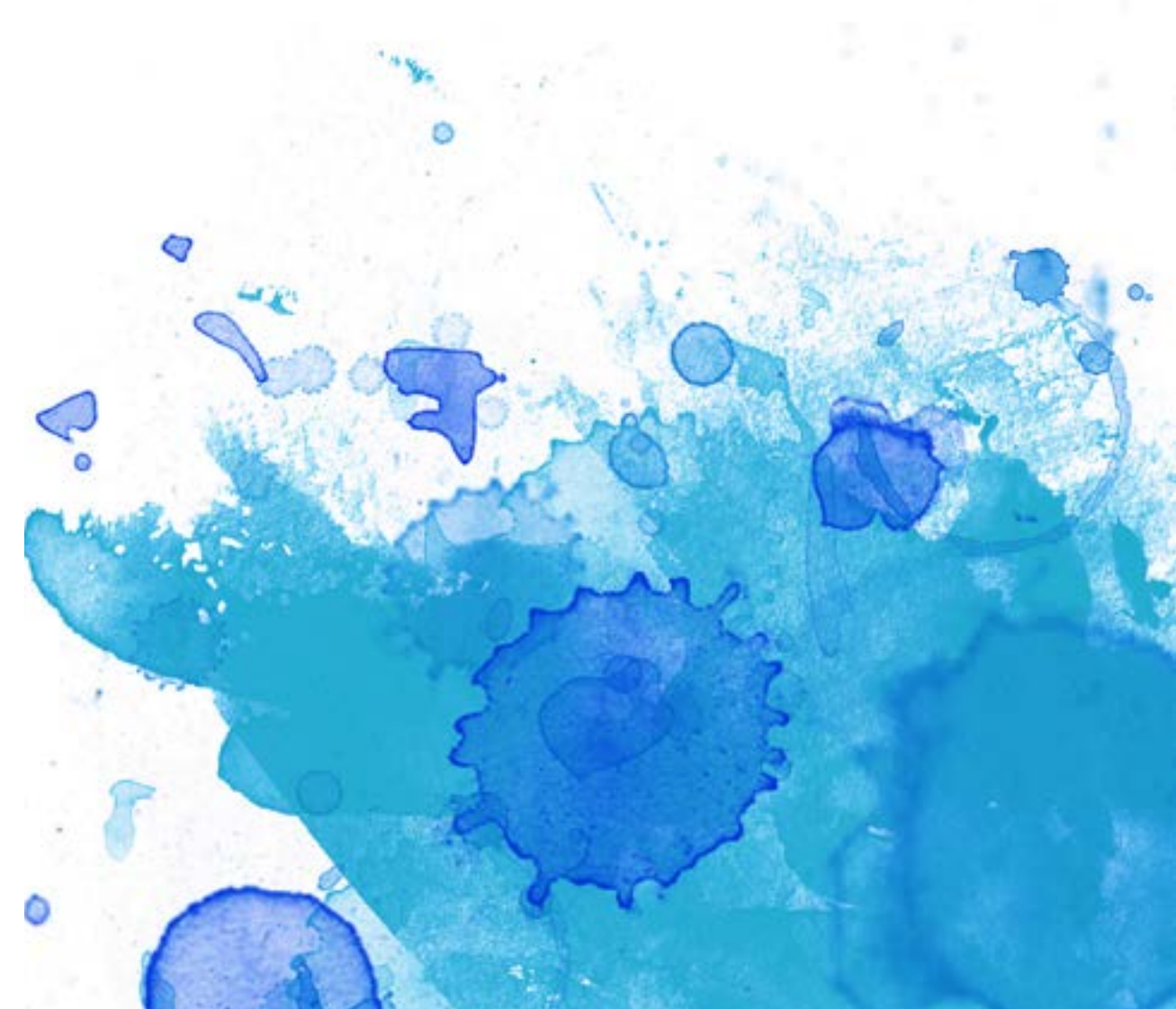
- + There is a dearth of research available about what works to improve schools. Despite decades of efforts, little is known about what actually works to transform schools and communities in service of student learning. Additional research is needed about not only what we should measure and how, but also how that information should be effectively used in school improvement processes, interventions and resource allocation decisions.

- **Focus efforts on ensuring education leaders and partners have realistic, achievable implementation plans with adequate capacity and support in place to ensure sustainability.**

- + Assess the needs of end-users and demand before beginning the development process. Afterward, ensure you are building market awareness of new tools and buy-in from those who would be responsible for implementation in the process.

- **Prepare for how technological advancements, including AI, will impact assessment and accountability.**

- + Advancements in technology, and in particular AI, are already profoundly affecting the education field and have the potential to significantly impact assessment and accountability innovations. We recommend that developers in particular approach these technologies with caution and optimism, define a clear purpose and use case for integration, center stakeholder needs and regularly examine biases in the technology.





FOR ADVOCATES:

- **Consider the implications of new and expanded definitions of student success and school quality on future policy**
  - + Advocates have an opportunity to continue learning about evolving definitions and goals for school quality and student success that students, communities and states are aspiring towards. For example, as data and tools that measure student wellbeing, learning environments and community contexts become more available, advocates might consider which data can be monitored and used to inform resource allocation to improve learning conditions for all students.
- **Explore ways that future policy can continue to balance the roles of local, state and federal oversight and encourage continued and regular updates to federal guidance to align with advancements in the field.**
  - + As states and vendors design more accurate and more equitable tests, the US Department of Education (ED) needs to continuously update and clarify peer review guidance to align with emerging assessment models and allocate more resources to competitive grants and federal research and development efforts.
  - + Support federal and state efforts that spur and sustain innovation among education organizations, researchers, developers and state education agencies. Additional investments are needed in R&D infrastructure, data and technology, and in competitive grant programs that incentivize innovations in assessment, accountability redesign and research.
- **Prioritize authentic, ongoing and meaningful engagement with key stakeholders, particularly those charged with implementing state and federal policies (educators, system and school leaders) to understand their needs, concerns and experiences.**
  - + Policymakers and advocates must take into consideration the implementation needs, enabling conditions and resources necessary to ensure fidelity of implementation and meaningful results.
- **Advance a proactive national research and policy agenda for the future of assessment and accountability and reignite bipartisan dialogue for education policy.**
  - + The education and political landscape over the past five years has created both challenges and opportunities for assessment and accountability innovation. The only path forward for any K12 policy agenda requires a powerful and principled bipartisan coalition that represents the interests of a diverse set of stakeholders and communities. Existing efforts should prioritize finding common ground and building an understanding of current challenges and viable policy solutions in order to prepare for any statutory or regulatory changes that may come in the years ahead. We need to come together more than ever to define goals for our communities, young people and school systems who serve them. We must also reset expectations at the local, state and federal level for how we expect our systems to achieve the stated goals we have for the next generation of learners.

*“We need to come together more than ever to define goals for our communities, young people and school systems who serve them. We must also reset expectations at the local, state and federal level for how we expect our systems to achieve the stated goals we have for the next generation of learners.”*



## FOR FUNDERS:

- **Set goals for multi-year public and private partnerships that leverage both philanthropic and federal investments.**
  - + The assessment and accountability field needs significant, multi-year investment to move from early innovation, research and development (R&D), to transformative and sustained change. The accomplishments highlighted in this report show several examples where philanthropic dollars effectively seeded new ideas that were then sustained through federal investment or research-practice partnerships. Organizations also cited the need for both short-term funding for R&D and long-term, sustained funding to ensure effective implementation. Grantmaking efforts should continue to focus on spurring innovation, testing new concepts and providing added coverage to incentivize healthy risk-taking.
  - + **Funders should continue to partner with their organizations to plan for and support the sustainability of their efforts.** Early R&D efforts are often difficult to sustain without long term funding. Working with partners early and regularly to ensure sustained investments are secured from multiple sources, including federal funding, is a critical enabling condition for success.
- **Continue to incentivize collaboration, dot-connection and coordination across the field and invest in breaking down silos and supporting infrastructure for productive knowledge and ideas exchange.** Multiple forms of expertise are required to successfully design and scale an assessment and accountability innovation. The field needs cross-sector and cross-disciplinary collaborations and needs to continue breaking down silos. While there has been some meaningful change taking place as a result of the investments made by the three foundations, the field largely remains siloed. We recommend prioritizing investments to:
  - + Expand access to knowledge, research, and common language and frameworks to inform dialogue in the field. Future grantmaking efforts should prioritize clear dissemination plans and provide time and opportunities for organizations to share their learnings and consider implementation implications.
  - + Share learnings across disciplines to ensure coherence in overall assessment system designs. Currently, innovations in science and social studies often occur separately from innovations in ELA and Math, in part because the latter subjects are more heavily regulated by federal requirements. At the same time, evolutions in the science of learning and development, social and emotional learning and competency-based education are often also siloed in their own discipline bubbles. Future grantmaking efforts should prioritize more integrated approaches that are cross-disciplinary and build on the vast knowledge that each discipline brings to the table.
  - + Rebuild bridges between policy, research and practice. Policymakers are often unaware of or detached from research on assessment, resulting in policy that is not robustly informed by research. A similar disconnect happens between researchers and those implementing assessment systems, preventing learning from research being applied in practice and vice versa. We believe this is particularly critical for any future federal policy or updates to the law. Future policy must be grounded in the realities of implementation and the most up-to-date research about what works to improve student learning and outcomes.
- **Update grantmaking requirements to align with stages of the R&D process, prioritize understanding stakeholder and market needs and ensure wide dissemination of learnings.**
  - + In our review of organizations' materials, reports and outputs, we saw an opportunity for funders and their partner organizations to better articulate expectations for grant



*“Organizations have generated a great deal of learnings across their efforts and there is a great opportunity for those learnings to be disseminated more systematically and to reach practitioner audiences more directly.”*

- outputs and outcomes to more consistently align with the stage of innovation or type of effort. For example, early-stage research and development efforts may not be producing a demonstrable impact on school systems or student outcomes, but instead are testing ideas or hypotheses and providing insight to support future efforts. Funding aimed at piloting or testing new products and solutions should also more clearly articulate their samples, key research questions and report implications for the next stages.
- + Several organizations reported gaining a better understanding of the community or market needs as they were developing their new tools, supports or resource offerings. Funders should work with partner organizations to conduct market and needs assessments before investing significant resources in a product, tool or support that may not align with the needs of communities or the marketplace.
  - + Many organizations have generated a great deal of learnings across their efforts and there is a great opportunity for those learnings to be disseminated more systematically and to reach practitioner audiences more directly. Future grantmaking efforts should prioritize dissemination plans to ensure wide access to new knowledge and information generated by organizations.







# ORGANIZATIONAL PROFILES

EXPLORE ORGANIZATIONAL PROFILES →