



FEWER AND BETTER LOCAL ASSESSMENTS: A TOOLKIT FOR EDUCATORS

PLAYBOOK



education**first**
experience | quality | results

INTRODUCTION

It's time for a more strategic approach to assessment. Schools, school districts, charter management organizations and states need to take a fresh look at what is measured: which assessments we give, when and why, and how the data are used. We need to use fewer assessments for multiple purposes and streamline the battery of tests we ask our students to take.

To help educators improve teaching and ensure that kids get and stay on track to succeed at all levels, every school system needs a strategy to implement a clear, coherent and aligned system of high-quality assessments. This strategy should result in both fewer and better assessments, and each assessment should have clearly-defined and understood purposes and uses.

When a school system has a clear, coherent and aligned system of high-quality assessments:

- All assessments are high quality and produce meaningful and accurate data aligned to the assessments' intended purposes.
- District central office leaders know the assessments schools are giving, and for what purposes.
- Assessments are aligned to college- and career-ready standards and represent appropriate rigor.
- Teachers and school leaders understand the purposes of all assessments, and know how to use data from each assessment to drive instructional improvement.
- Students and parents understand all assessments and their purposes, and believe the data are valuable.
- The fewest possible assessments and least possible amount of total testing time provide the best possible information.

PLAYBOOK TO UPDATE AND STREAMLINE DISTRICT ASSESSMENT STRATEGY

Making strategic decisions about assessments across multiple subject areas, purposes and grade levels is complex work. To engage stakeholders, make thoughtful decisions and help teachers and students, your district will need a strong process, effective project management and courageous leadership. This playbook outlines the **major phases of work and key steps within each phase** that can be customized to the needs and context of any school district.

We recommend approaching this work in five phases. Though these are outlined sequentially, in reality the process will not be purely linear and district staff will need to view the phases as more iterative and look ahead to future phases while doing the core work of an individual phase. At the highest level, below is a snapshot of the phases.

FIGURE 1 | Assessment Strategy Process in Five Phases



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Phase 1: Reflect & Plan

Establish district objectives & preliminary priorities for the assessment strategy

ALLOCATE THE NECESSARY RESOURCES (PEOPLE, TIME & MONEY)

To do this work well, many stakeholders and district staff will need to be involved. Knowing that school systems are often stretched for time, with competing priorities, district leaders need to be clear that this work is a priority for which key district staff are expected to dedicate time.

FIGURE 1 | Questions to Consider Before Beginning an Assessment Strategy Project

POLICY CHANGES	<ul style="list-style-type: none"> What policies could you adjust, or put into place?
STAKEHOLDER ENGAGEMENT/ COMMUNICATION	<ul style="list-style-type: none"> Which stakeholders will you need to engage and at what point? How will you engage them? What communication strategies and feedback loops will help ensure stakeholders understand and feel connected to the project?
RESOURCES AND SUPPORT	<ul style="list-style-type: none"> How much funding will you devote? How will you allocate it (e.g., through an RFP process)? From what funding source? What staffing needs will be necessary? What tools will you adapt or create for schools to use in inventorying current assessments? What organization(s) will support you?
SCOPE AND TIMELINE	<ul style="list-style-type: none"> What activities will you ask schools to complete? (Develop plans to review existing assessment systems and streamline them? Actually implement these plans?) What deliverables will you ask them to produce? By when will you ask schools to complete their assessment reviews or implement any new policies?
SCHOOL SELECTION	<ul style="list-style-type: none"> Will you work with all of your schools, or a subset? If a subset, how will you select them? Are any schools already streamlining their assessment systems?
PROFESSIONAL LEARNING	<ul style="list-style-type: none"> What professional development will you need to provide to schools? At what point? Through what mechanisms?

APPOINT A PROJECT LEADER AND A STRONG PROJECT MANAGER

Your district will need a **Chief-level sponsor** of the project who is empowered to make decisions and can raise necessary issues with the Superintendent. It's also important to designate a **strong project manager** who can drive this process and effectively coordinate across central departments and divisions as well as school leaders and teachers. Be sure to select a team member, ideally someone reporting

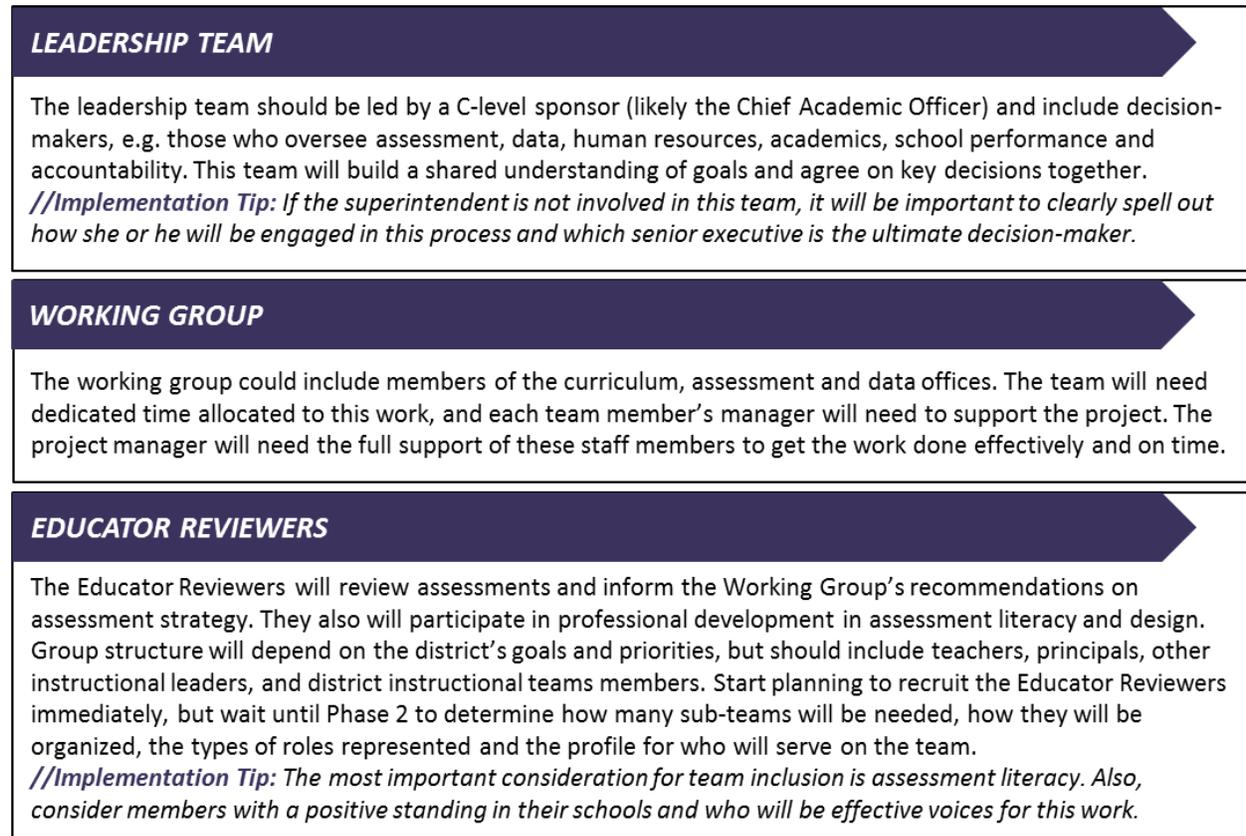
directly to a Chief, who has the bandwidth to focus on managing this project. The specific amount of time will depend on the scope of the project, but as a reference point, in Syracuse, a mid-size urban district, **project management of this effort required approximately ten hours a week** over the course of a school year (split between the district’s project manager—the executive director for curriculum and instruction—and Education First). Selecting the right project lead is critical to setting up this project for success.

OUTLINE THE ROLES OF KEY GROUPS

Once a project manager is established, outline the roles of stakeholders and how they will be organized and utilized throughout the process. While this will be tailored to the structure and context of each district, we recommend you:

- Create a cross-functional **Leadership Team** to ensure coherence across district initiatives and oversee the process.
- Put together a **Working Group** to do the heavy leg work.
- Begin planning for a team of **Educator Reviewers**, including teachers and instructional leaders.

FIGURE 2 | Stakeholder Teams: Membership and Structure



REFLECT ON DISTRICT NEEDS & CONTEXT

Reflect honestly. To establish a clear purpose and guiding principles for this process, district leaders need to consider the overarching goals for updating the district assessment strategy and draft district-specific objectives and priorities. The Leadership Team starts by reflecting on high-level questions:

BIG PICTURE

- What are our priorities, and how can assessments enable them?
- What are our greatest needs regarding assessments?
- What needs to change for our assessments to enable stronger student learning?
- What problems related to assessment must be solved to better serve students?

CURRENT STATUS

- Does our district have rigorous, reliable assessments for assessing learning?
- Are there multiple assessments the district sponsors that serve the same purposes?
- Do we have concern about the quality of some assessments?
- How are teachers and school leaders currently using the data?

CONTEXTUAL FACTORS

- What external regulations impact our assessment strategy?
- Are parents expressing concerns about our district’s assessments?
- Is there an opt-out movement in our district?
- Are teachers or administrators expressing frustration with testing requirements?

Engage stakeholders early. Establish the case for this work and begin the communications about assessment streamlining early to build stakeholder investment in the importance of the process. Engage key individuals and groups to ensure the objectives and priorities are right. It is crucial to ensure your assumptions about what is most important are aligned to what is actually happening in schools. Do some legwork here: Talk to the school board, parents, principals, teacher advisory groups, unions. Beginning with and clearly defining the real (not perceived) problems is important. It helps to accurately shape your vision for what a successful assessment review process can accomplish. Vetting your theories and goals with stakeholders allows authentic and meaningful participation early on, and ensures that the project is grounded in the reality of what end-users are experiencing.

// Implementation Tip: Carefully design, develop and disseminate your outreach to community stakeholders.

Depending on the context in your district, you may have separate teacher advisory groups, unions, boards and parent advisory groups in place. We encourage you to be thoughtful about how you will engage these interested parties, through updates, input and/or direct involvement. [Here are some of the communications used in Syracuse.](#)

ESTABLISH OBJECTIVES AND PRIORITIES

Focus the work. Based on reflection and planning, the Working Group can map out the preliminary objectives and priorities for the assessment review process. The objectives will make it clear what needs to be accomplished during the review. The priorities will raise the level of importance or time given to certain areas or criteria throughout the process. While these objectives and priorities will focus this effort, they should not prevent other important issues from being surfaced, even if those issues are simply captured and reconciled at a later time. Failure to crystalize objectives and priorities at the outset will lead to decisions having many masters.

You won’t be able to solve for every issue in this process, and if you try to, you will get stuck. Begin with a hypothesis about the 2 or 3 most important needs and plan to solve for those. Your objectives and priorities, alongside the overarching goals articulated above, should be used to evaluate the final plan at the end of this process—they will define what success looks like in your district.

WHAT CAN DISTRICT LEADERS DO TO ENSURE SUCCESS DURING THE ASSESSMENT REVIEW PROCESS?

Allocate time for people

Depending on who is assigned to lead and participate heavily in this work, department leads and chiefs must establish a mandate that this is prioritized work.

Establish a clear budget for process

You may need to provide monetary incentives to Educator Reviewers, or hire an external project manager. You may choose to invite community members to discussions about assessments over dinner. Regardless, this process will need funding, so consider the sources and total amount available for the project.

Be aligned on goals

The Superintendent and CAO will need to align early in this process and will need to ensure strong commitment and alignment across the district leadership: if there is confusion or misalignment about the primary goals of the assessment strategy at the senior leadership level, this confusion will trickle down through the process and will make decision-making challenging.

Determine preliminary priorities. The Leadership Team will need to be aligned on the established overarching needs and problems facing the district, as well as the goals of the effort. The clear, coherent and aligned system of high-quality assessments should directly connect to the larger district context, goals and initiatives. However, it's very likely that some of these needs and problems may not surface until the project is underway. While it is important that the district leadership be aligned on the specifics at the beginning, it is more important that there is strong alignment and support among leaders around the final recommendations.

Decide on a decision-making process. Led by the project manager, the Leadership Team should also clarify how to make (sometimes unpopular) decisions. Everyone may be able to agree that reduction of redundant assessments is a good thing. There will likely be areas of easy agreement about which assessments to cut, or areas that present gaps. At the same time, the decision to eliminate assessments that some have held dear could become a sticking point. Clearly defining your priorities and decision-making process at the outset saves hand-wringing and foot-dragging later.

This set of decisions and beliefs will ultimately become your **district assessment** framework. We've included three examples from a state department of education, school district, and charter management organization.

Clearly defining your **priorities** and **decision-making process** at the outset saves hand-wringing and foot-dragging later.

FIGURE 3 | Assessment Review Process Models in 3 Contexts

The following FOCUS boxes are real-life examples of direction-setting for the assessment review process.

A FOCUS ON DISTRICT SUPPORT

*Rhode Island Department of Education
Sample Project Objectives*



The Rhode Island Department of Education works closely with a small group of its Local Education Agencies (LEAs) to accomplish the following:

1. Determine how much testing is actually being conducted based on federal, state, and local requirements
2. Determine how much testing is measuring redundant knowledge and skills
3. Understand the extent data from the assessments driving instruction, curriculum revisions, and professional development
4. Determine the status and quality are of locally developed assessments
5. Define LEA Comprehensive Assessment Systems

A FOCUS ON STREAMLINING

Syracuse City School District Assessment Framework & Belief Statements



Syracuse City School District (SCSD) built an assessment framework that outlined the goals of each type of assessment and how assessment fits into the district’s overall instructional improvement strategy. SCSD also created a belief statement about the role of assessment in their overall district goals.

Belief Statements:

Assessments should be high-quality.

We must make the most of the time students and teachers have together. Assessments must be aligned with rigorous standards and measure students’ abilities to think critically, synthesize material from multiple sources, analyze problems and justify responses.

Assessments should be part of a coherent system.

Assessments should complement each other in a way that defines a coherent system of measures. This requires balance of different assessment types staggered across a school year to holistically capture student performance and growth. Assessments that provide similar information on teaching and learning should be eliminated

Assessments should be meaningful.

Assessments are critical to improving instructional practice in the classroom by arming stakeholders with the most important information. A robust assessment system is also empowering to students. Students should have access to assessment data so that they understand where they are in relationship to the goals they are setting for themselves. To best accomplish this, the results of assessments should be timely, transparent, disaggregated, and easily accessible to all stakeholders so they can interpret and analyze results.

A FOCUS ON RIGOR & COLLEGE READINESS

Achievement First Assessment Strategy Objectives



Assessments are critical to measuring scholars’ learning and college-readiness.

Achievement First (AF) invests significant effort implementing and gathering insights from assessments . In order to evaluate the efficacy of our assessments, we developed an assessment strategy that will facilitate the review of assessments across all grades and subjects

The goals of the assessment strategy are two-fold: determining requirements and ensuring coordination.

1. Determine the assessments and implementation requirements that will allow the network to know whether our scholars are on the right path to be college-ready
2. Ensure that there is required coordination across the network to implement this strategy

The assessment strategy consists of three steps : reviewing curriculum needs, performing comparisons and gauging implications.

1. Review our current curriculum needs, to understand where assessments are required or meet minimum standards. To ensure we are building a cohesive strategy, we will evaluate by grade, whether a specific type of assessment is required or if a strong assessment is already in place for our curriculum that sufficiently meets AF's needs based on. Existing assessments are evaluated based on assessment criteria through input from Achievement First directors & principals.
2. Perform a comparison across 4 dimensions for different assessments
3. Provide a framework to implement assessments taking into account, Ops, Data Strategy, and CAO implications

FINALIZE THE SCOPE AND PLAN TO EXECUTE EFFECTIVELY

This process recommends that you identify every single assessment used in your district *by more than one classroom/by more than one teacher, measuring more than a week's worth of instruction*. These criteria allow you to identify those assessments that can be streamlined at a building or district level. Every instructional minute matters for kids, so it will be important to understand if a second grade team of three classrooms in a single building is still giving a weekly spelling test from a basal the district stopped using three years ago. But it's not wise nor feasible to analyze every quiz or exit slip used by teachers across the entire district. That said, the scope of assessments you review and your criteria for identifying which assessments you review will vary, and we recommend that the decision of which assessments to review aligns to the primary objectives and priorities of this process, as determined by the District Working Group and Leadership Team.

Every instructional minute matters for kids, so it will be important to understand if a second grade team of three classrooms in a single building is still giving a weekly spelling test from a basal the district stopped using three years ago. **But it's not wise nor feasible to analyze every quiz or exit slip used by teachers across the entire district.**

Once the scope is finalized, it will be important to do robust project planning. Taking the time to get clear on the project management aspects of this work before major work begins is essential to running a smooth process. The project manager should take the time to develop a detailed work plan with an emphasis on major aspects of the project, including:

- [Timeline and milestones](#)
- Communication and engagement plan for key stakeholders
- Major input/decision points for the District Leadership Team
- Responsibilities, time commitment and benefits of serving on the Educator Reviewers Team
- Process for the recruitment and selection of the Educator Reviewers Team

//Implementation Tip: Ensure Success with a Strong Project Manager and Defined Roles.

- Ensure you appoint a strong project manager. Given the myriad stakeholders and process points, you should assign someone who is detail-oriented and skilled at communicating and collaborating with staff and stakeholders.
- Keep in mind general [change management principles](#) and proactively build these into your project plan so that investment and adoption of final decisions are well-received.
- Be clear on roles of those involved vis-à-vis decision-making vs. input and feedback. Ensure the final decision-maker is clear and each stakeholder knows their role in getting to final decisions (this will help avoid decision by consensus which can result in a watered-down final plan).

PHASE 1: LESSONS FROM SYRACUSE

Build an assessment framework.

Syracuse built an assessment framework that outlined the goals of each type of assessment and how assessment fits into the district's overall instructional improvement strategy. SCSD also created a belief statement about the role of assessment in their overall district goals.



Phase 2: Conduct the Inventory

Capture, sort and describe all assessments, and take the first step to analyze all district and school assessments

In this phase, we rely heavily on Achieve’s [Assessment Inventory](#) while providing advice on how to use the Inventory. Look for links throughout Phase 2 that click over to Achieve’s tool.

CAPTURE ASSESSMENT INFORMATION THROUGH AN INVENTORY PROCESS

After your district identifies its objectives and priorities and lays out a strong project plan for the review process, the next step is to conduct a full inventory of assessments.

We recommend using or adapting Achieve’s open-source [Inventory Table](#) (pages 8–9) to gather information on the assessments given in your district. Start with the assessments the state and district require. Next, the district needs a process to collect information about school-based assessments that district staff may not know about. To fully understand the assessments used across schools, we recommend that your district identify every assessment used in your district *by more than one classroom/more than one teacher, measuring at least a week’s worth of instruction*. Your scope and criteria should be driven by the priorities of your district.

Effectively planning and managing the review process is essential. The list of assessments that schools give might be surprisingly long, and the review process can get overwhelming if it’s not well-organized. In this phase, the project manager should design a survey tool and identify points of contact at each school to help collect information.

A survey used by Syracuse City Public Schools can be found [here](#).

While you’re designing the survey tool, start sharing information about the assessment review process with school leadership teams. School building leaders and faculties need to understand the purpose of the inventory survey and why the district is engaging in this work. **Communication matters here.** The Leadership Team should speak directly with school teams about what’s happening, why, and what information is needed for the review to work well.

SORT THE INVENTORY TO PREPARE FOR ANALYSIS

Once you’ve compiled the initial list of assessments, the project manager should loop back with relevant school and central office staff (e.g., the assessment office; specialists in special education and English language learning; federal programs office) with any follow-up questions. When you’ve revised the list for clarity and completeness, the Working Group should do a rough sort of the assessments by purpose (assessments used primarily for school or teacher evaluation, tracking progress at the school or district level, improving classroom instruction, screening, etc.). This will enable the district staff to scan for any obvious omissions from the inventory as well as facilitate initial sense-making. The goal here is to generate a strong (not perfect) inventory of the assessments in the district according to the criteria set by the district team (e.g., *assessments used by more than one classroom/teacher, measuring at least a week’s worth of instruction*). It probably won’t be possible nor worthwhile to collect every assessment, so focus on getting a strong/mostly-complete list that the district and teacher teams can evaluate.

From this comprehensive list, you should sort by grade bands, by subject area, and any other way needed to answer the questions you need to ask to update the district’s assessment strategy. As you conduct these various sorts, develop a set of “data views” that convey a comprehensive picture of the current scope and state of use for assessments in the district.

These basic sorts will serve as the source of *descriptive information* you’ll need to provide for the Educator Reviewers, so that they are able to get a view of the whole picture before going deep on individual assessments.

//Implementation Tip: Use the sample basic “data views” for elementary math below as a model for your own process.

- **30,000-foot Level:** A complete list of every assessment given in elementary math, sorted by grade level, that includes descriptive information such as frequency, timing, purpose and how data is reported
- **10,000-foot Level:** A list of assessments for each elementary grade level, sorted by purpose (to illustrate possible redundancies)
- **Ground Level:** A list of assessments for each elementary grade level, sorted by timing—perhaps laid out on a calendar (to illustrate whether assessments are being given in too close proximity, which could lead to a feeling of over-testing and an accumulation of unused data)

Educators, researchers and policymakers use many terms for assessment—formative, diagnostic, summative, benchmark, interim, screener and more. The important thing is the **purpose** of the assessment, not its label or type.

In this playbook, we define **formative assessment** as processes used by teachers and students during instruction that provide feedback to adjust ongoing teaching and learning to improve students’ achievement of intended instructional outcomes. **Summative assessments** evaluate students’ performance against a defined set of content standards. **Interim assessments** evaluate students’ knowledge and skills relative to a specific set of academic goals and can inform program or policy decisions at both the classroom level and beyond, including as the school or district level. **Modular interims** cover smaller sets of standards are administered with greater frequency than **broad coverage interims** and can play a more formative role. **Universal screeners** are given at regular intervals, and provide a high-level snapshot of the entire student body as related to a core subject (e.g., a reading level). **Diagnostics** take a closer look at student performance than universal screeners, and are used to

BEGIN TO ANALYZE THE ASSESSMENTS & PREPARE FOR THE NEXT PHASE

The project manager, in concert with the Working Group, should develop a high-level summary of the findings from the inventory process. It is now time to do a more in-depth analysis of the data from the inventory and form hypotheses about what issues need to be addressed to strengthen the district assessment strategy. This analysis should help the Working Group decide which assessments will be reviewed by the Educator Reviewers, which will be reviewed by district staff or other technical experts (using a tool like SAP’s [Assessment Evaluation Tool](#), and which won’t need to be analyzed. From the Achieve Student Inventory Tool, you’ll want to answer questions C.1 (about how many required assessments are in each grade, frequency, calendar of assessments), and add any needed additional information.

As you prepare to bring together the District Leadership Team to make final decisions, **review the contracts the district has in place with each assessment vendor.** In many cases, knowing the terms and details of each agreement will be important as you explore revising or terminating the use of an individual assessment.

The Working Group might also find some quick wins, if the initial inventory identifies redundancies or gaps that the district could begin addressing right away. Maybe your district, for example, has traditionally let schools determine which early reading (grades K–3) screener assessments to use. But does the district need four or five different reading universal screeners? Are they all producing similar data? Which do teachers find most useful and reliable? Which can you eliminate? Does the district want to centralize and choose one screener for all schools to use? The goal, again, is not to eliminate tests merely for the sake of volume reduction. **Rather, the goal is to identify high-quality assessments that, through their content and results, fully meet the district’s diverse data needs, while simultaneously ensuring teachers get clear assessment data that can drive learning outcomes for students.**

Similarly, your initial analysis may uncover critical gaps. Are any grades or courses missing a crucial assessment? Does third grade not give math interim assessments at all? If so, you could begin looking for an assessment that will help you understand students’ mastery of third grade math standards.

As you conduct this initial analysis, begin to think about the framing and focus for the Educator Reviewers, who you will engage with in the next phase. Who do you need to recruit? Which assessments will they review? What might their process look like?

WHAT CAN A STRONG ANALYSIS ENABLE EDUCATORS TO DO?

- **Identify redundancies** that can be addressed right way, creating some “quick wins” in the effort to streamline.
- **Determine if they need to address any obvious administration or operational issues**, such as required testing windows overlapping with other major instructional events.
- **Uncover critical gaps** that need to be tackled, such as the absence of a reliable, high-quality summative assessment in a grade/subject.
- **Surface school-level misunderstandings** about the purpose, use or data from an assessment that are undermining the value or validity of an assessment.

You may discover some fundamental misunderstandings about assessment. Perhaps an assessment purchased as a universal screener is being used as a summative, or a district-wide interim assessment isn’t being used as a data point to gauge standards mastery. This assessment review process does not directly address assessment literacy for all teachers and leaders, but the district could use the issues uncovered here to inform a future professional development series.

Finally, the Working Group should begin to complete the LASER rubrics for the Educator Reviewers. Both the math and ELA LASER rubrics have sections that should be completed by someone from the assessment team to ensure consistency and accuracy across all assessments inventoried.

PHASE 2: LESSONS FROM SYRACUSE

Communicate, up front, the goals and expectations of your initiative.
 SCSD conducted outreach to key stakeholders such as a teacher advisory group, local unions and principals prior to launching the work. This initial outreach helped gain buy-in from these groups, and facilitated the inventory process.



Phase 3: Engage School-based Educators *Select, Convene, Train and Prepare Educator Reviewers*

This phase, perhaps more than any other, is heavily informed by local context and district priorities. You can engage teachers with existing technical skills in assessment design or choose to develop literacy in a cohort of teachers that may be more representative of the schools across the district. The extensive materials and resources in the Teacher Engagement Toolkit will help you implement this phase. We’ve linked to these materials throughout this section.

CONSIDER KEY CRITERIA FOR EDUCATOR REVIEWER SELECTION

What are the knowledge and skills required to serve as an Educator Reviewer?

The assessment review process hinges on choosing the right teachers and other school-based instructional leaders (classroom teachers, special education teachers, reading and math specialists, curriculum coaches, assessment coordinators, etc.), and then training and supporting them in the process so they can inform the district’s policy recommendations.

The ideal reviewer is an experienced educator with strong knowledge of content and standards, an interest in assessments, and a fondness for collaboratively digging into complex issues. Where possible, Educator Reviewers should also have a solid background in assessment literacy and a track record of producing measurable academic gains with their students.

Why Engage Educators?

Teachers and principals need to know the purpose of every assessment they give, how to analyze and use the data to inform instruction and how to make choices that increase student learning. They also require time to analyze that information and make choices. Redundant, low-quality and/or legacy assessments undermine the indispensable value that a few well-chosen, purposeful, high-quality assessments can provide for teachers, schools and school systems in ensuring all children learn.

Teachers have a view into the reality of assessments more than any other person in the school system. Teachers know first-hand what it’s really like to use an assessment in the classroom, from the student experience to issues with administration to how the assessment supports (or detracts from) valuable instructional time. Teacher involvement generates ownership for the resulting assessment strategy—from teachers, parents and the broader community.

DEVELOP A RECRUITMENT STRATEGY AND SELECTION PROCESS

Now that you have a clear idea of your ideal reviewer and how you will make this process one that educators are eager to participate in, develop a plan for how you will recruit and select Educator Reviewers. **Think about the teachers in your district.** The project manager, in concert with the district Leadership Team, will need to decide how to balance the selection of Educator Reviewers.

This set of decisions needs to be made thoughtfully, and will require consideration of local context above all else. In many districts, there might not be a large number of teachers who are already trained

WHAT STRATEGIES DO DISTRICTS USE TO ATTRACT TOP EDUCATORS TO THE EDUCATOR REVIEW TEAM?

Teachers on the review team not only will get to inform district policy, they will increase their own understanding of high-quality assessment practices. Consider key recruitment strategies below:

- Connect to career pathways or formal teacher leader programs within your district
- Develop key points that will inspire and motivate educators to participate
- Hype up the professional development aspect of this process. If your district requires a certain number of independent PD hours per year, provide credit for this time
- Craft a recruitment strategy where the top candidates are proactively recruited to apply/sign-up
- Secure principal support for release time; ensure that release time is a time that an effective teacher would feel comfortable being out of the building
- Allocate stipends, especially if little to no release time is provided
- Outline the commitments expected of team members, as well as the additional resources/support they will receive
- Develop a communication plan to inform teachers, principals and instructional team members across the district of this project and the opportunity

in assessment design. In some cases, it might make more sense to set up a less technically rigorous, more inclusive process, while still making it feel like a good opportunity and/or providing a stipend.

Determining which teachers are best qualified will likely require a simple application process that includes at least one assessment-related performance task, such as ranking the rigor of five questions on the same standard. The Teacher Engagement Toolkit has tools and resources to help you identify the best teachers for your review process.

PREPARE AND TRAIN THE EDUCATOR REVIEWERS TO EVALUATE ASSESSMENTS

Your district should plan to create a customized professional development plan to build the reviewers' assessment literacy in general and on this process specifically.

Assessment item analysis can be technical, and many educators (even when chosen through a rigorous application process) will need some additional training (see Teacher Engagement Toolkit) to be successful in this work. Most reviewers will need to develop a strong foundation in assessment literacy by the time the review process begins.

Educator Reviewers often enter the process with different levels of assessment literacy. Our toolkit can help bring team members up to speed.

We provide in depth resources on a range of assessment topics. Consider where your team members may have gaps based on past efforts in this area. If you are unsure where to start, we recommend using the [Reform Support Network's Assessment Design Toolkit](#), beginning with the following modules: Purposes, Rigor and Alignment. Illinois has also developed some great assessment literacy resources as part of their audit process: [Illinois SBOE assessment literacy](#).

//Implementation Tip: Local context should heavily inform your approach to selecting Educator Reviewers. Some questions you might ask prior to the selection process:

- Will you give priority to teachers who have less assessment experienced, but have strong instructional expertise, or whom you are grooming for leadership? Or teachers who have all of the skills needed?
- Will you choose only the teachers who complete perfect performance tasks?
- Will you choose teachers who need training in assessment purposes over those who might need training in alignment of items?
- Will you choose teachers who demonstrate understanding of assessment design, but have not had strong results with students themselves?
- Do you have existing structures (Curriculum Fellows, master teachers) that would easily transfer to team members?

WHAT ARE WAYS TO DETERMINE THE SIZE AND STRUCTURE OF THE EDUCATOR REVIEWERS TEAM ?

Assuming you are taking on this project for all core subject areas (ELA, Math, Science, Social Studies/History), for all grade levels, there are several possible configurations.

- Teams would be by subject grade and would each have 3-5 members, a teacher, district content person, and school leader (could be instructional coach, AP, dean, principal)
- Teams could break down by:
 - simple grade bands (K-2, 3-5, 6-8, 9-12)
 - crossing grade bands to check for vertical alignment (K-3; 3-5; 5-8; 8-12)
 - deep dive on one subject, like K-12 Science
 - deep dive on looking at assessments across one grade level (starting with capstone grades or grades where data is weak—e.g. 2nd, 5th, 8th, 10th, 12th)

Together with Achievement Network (ANet), we developed the [Local Assessment Screening Educator Rubrics \(LASER\)](#). These rubrics provide a simple, clear set of criteria for the Educator Reviewers to evaluate assessments *given by more than one teacher covering at least one week’s worth of instruction* by evaluating quality; alignment to standards; and overall instructional usefulness. The rubrics have been through two rounds of educator use and feedback already, and under the guidance of our partners at ANet, will undergo two more educator feedback loops in August and September 2015.

This playbook is accompanied by a Teacher Engagement Toolkit which includes English language arts (ELA) and mathematics rubrics; training materials on assessment literacy and on the LASER rubrics; examples to help calibrate all reviewers; and guidance for making strong qualitative judgments and recommendations.

ANet helps schools boost student learning with great teaching that’s grounded in standards, informed by data, and built on the successful practices of educators around the country

PHASE 3: LESSONS FROM SYRACUSE

Ensure that teachers conducting reviews have strong assessment literacy skills.

SCSD provided basic training to teachers conducting the reviews; however, input from the team members suggested that additional training and support on how to apply the rubric could have been helpful. This toolkit provides additional assessment literacy training that can help.

Be clear on the roles and responsibilities of Educator Reviewers.

SCSD staff provided a basic level of background of the project, the assessment review process and the roles of the teachers on the team. Many of the teachers had previously served on similar advisory committees. For some teachers, however, being empowered to recommend district-level policy changes was a new role and Syracuse district staff needed to reinforce the key role that the teachers were playing in reviewing each assessment and making a recommendation to the district

Give Educator Reviewers time to practice and work together.

Syracuse staff provided examples of assessment items and reviewed them together with the teachers. They also allowed the teams to practice together. More practice could have been useful, both to familiarize the teachers with the tools and with each other. The assessment literacy training materials highlighted in this toolkit will help to provide more opportunities for teachers and teams to practice this work before beginning their reviews.

Be thoughtful about team structure.

Here’s how the Educator Reviewer teams looked in Syracuse:

- 5 teams, organized by content areas: ELA, Math, Science, Social Studies, ESL
- Each team consisted of 3–8 educators with representatives from elementary, middle and high schools, as well as educators with special education experience



While the rubrics include a 1-4 rating system and ask reviewers to add up scores to get a sum that corresponds with a recommendation for the district, the rubric also allows for complexity and leaves room for educators to use their judgment and make decisions on a case-by-case basis. For example, the ELA rubric includes a separate score for Text Quality and Complexity that must be considered alongside the Summary Rating. And a “Narrative Explanation for Recommendation” is required for each assessment reviewed.

After reviewing an entire assessment and providing evidence for each criterion in the rubric and an overall scoring rationale, the Educator Reviewers will make one of four recommendations:

1. **Eliminate and replace with a different assessment**
2. **Eliminate and do not replace**
3. **Keep and modify the assessment**
4. **Keep the assessment as is**

ANALYZE THE ASSESSMENT SUITE AND PROVIDE INPUT INTO DISTRICTWIDE RECOMMENDATIONS

In addition to considering the quality and usefulness of each assessment, the team should look at *all assessments given in a single school year for each given grade/subject* and determine if there are redundancies or gaps that may have implications for the assessment strategy. Looking at all assessments reviewed for a given grade and subject (e.g. 4th grade mathematics), the Educator Reviewers should ask:

- Does each assessment serve a clear and non-duplicative purpose?
- Which assessments help teachers and school teams most effectively inform their instruction?
- Are there clear gaps/needs not currently being served by existing assessments? Are there ways to meet these needs with existing assessments, rather than adding an additional assessment?
- Are there obvious redundancies? Opportunities to eliminate or consolidate assessments?
- Which assessments have real benefits to teachers, students, parents and the system as a whole? What are those benefits and are they aligned to district and school priorities?
- Of the assessments reviewed and those found most useful, what might strengthen the use of assessment results for their intended uses?
- Are there new insights about the assessment strategy based on your review of these assessments at large?

For example, in 4th grade, your inventory may uncover 7 math assessments and 6 ELA assessments, all of which are given at similar points during the year. The mathematics reviewers may evaluate 3 interim assessments (given in October, January and April), 2 end-of-unit assessments and 2 diagnostic pre-tests. The English language arts team may evaluate 3 interim assessments (given in October, January and April) and 3 end-of-unit assessments. For math, the Educator Reviewers may recommend keeping 5 of the 7, and the ELA reviewers

//Implementation Tip: Convening the Educator Reviewers should be done in person if possible.

In Phase 3, the first meeting (Convene the Educator Reviewers & Frame the Work) focuses on the goals of the work and initial inventory findings. The second meeting (Train and Model the Assessment Review Process) consists of a deep dive rubric training. At the third and subsequent meetings, Educator Reviewers are applying the LASER to evaluate assessments (Phase 4) and making recommendations. Ideally, the meetings would happen on a districtwide PD day, or the Educator Reviewers would have stipends or substitutes provided for ½ day meetings. The meetings can be done over webinar for a large district. We recommend that the “c” level sponsor of the work participates in the 1st meeting and that the project manager (or a seasoned facilitator) leads the meetings. In Syracuse, sessions were held after-school, on Saturday, and via webinar.



might recommend keeping all 6 but shortening the length of the 3 end-of-unit assessments. The Educator Reviewers must now consider what input to share with the district, factoring in the district’s assessment goals/priorities. This input should include recommendations for each individual assessment, as well as recommendations for all assessments for that particular grade/subject.

It’s up to your district to decide whether to put the math and ELA teams together to identify whether the assessments that can be streamlined or eliminated, or whether to leave that set of recommendations to the district’s Working Group. No matter what, the sum total of the tests given in the elementary grades must be considered for each grade level, across subject areas, and not only by the subject-specific teacher review team.

PHASE 4: LESSONS FROM SYRACUSE

Revise the assessment framework based on review team feedback.

Syracuse made revisions to their assessment framework, midway through the review process, in large part due to feedback from the review teams. This further empowered the review teams as they continued their process.

Make hard decisions about which assessments to keep, remove and improve.

Syracuse district leaders set out with a key goal to streamline their assessments and align them to the framework they created. They used the recommendations from the teacher teams to inform their decisions, and are eliminating additional assessments that they found to be redundant but not recommended by the teacher teams. These decisions are difficult – in many instances the assessments have been used in the district for a number of years, and so they have advocates who wish to retain them. The district believes that following the steps outlined in this guide helped them stay true to the intent of this work, even when decisions became hard.



Phase 5: Update Assessment Strategy

Make key decisions; compare to original objectives; develop & communicate strategy staff and the community

With the findings and input from the Educator Reviewers, the district Working Group is ready to consider all of the information gathered during this process to outline the recommendations it will present to the Leadership Team. This playbook encourages school systems to raise the quality of assessments and to streamline assessments wherever possible to reduce the amount of testing that is not adding significant value.

ENGAGE WORKING GROUP TO REVIEW THE EDUCATOR REVIEWERS' INPUT & DEVELOP RECOMMENDATIONS

While each district will manage the process differently, it may help for the Educator Reviewers to convene and present its findings to the entire district Working Group to ensure that the Working Group members fully understand the findings and input of the Educator Reviewers. Once the findings are presented and the discussion is complete, the Working Group members should share their initial reactions and impressions of the findings. In such a meeting of the Educator Reviewers and Working Group, the district's Working Group members should ask questions and raise discussion points that specifically surface areas of disagreement. If the Leadership Team ends up making a different set of decisions, it will still feel like the teachers' input was considered if the discussion among the Educator Reviewers and Working Group identifies disagreements.

Most importantly, the Working Group is hearing from the Educator Reviewers to gather knowledge and inform its recommendations to the district's Leadership Team. The Working Group should be able to make good recommendations about improving, keeping and eliminating assessments and to carefully examine what other purposes assessments might serve. For example, do students need to take an end of course exam AND an Advanced Placement test in Physics? Do *all* students need to take a reading fluency assessment multiple times a year alongside a comprehensive interim?

If your district chooses not to have the Educator Reviewers present to the Working Group, the project manager should compile the Educator Reviewers' findings to determine key takeaways and initial recommendations. Some of this input will be straightforward and obvious, due to low rubric scores in certain categories.

We recommend that the Working Group review the full assessment inventory and the Educator Reviewers' recommendations as a pre-reading for the

//Implementation Tip: Focus the Working Group's efforts by asking them to consider the following questions:

- Are these the right assessments at the right times?
- Is it too much testing to achieve our instructional goals? Not enough?
- Are the most essential standards assessed adequately over the course of the year?
- Are the assessments we're using high-quality, meaningful and reliable?
- Are some assessments being given too close in time to another assessment?
- What assessments can be eliminated, even if the review team found that they're high-quality, simply because they're redundant with other assessments?

meeting. During the meeting, the Working Group should clarify any factual questions about the inventory or the recommendations, and then engage in productive dialogue about how to address outstanding redundancies and gaps.

Given that the goal of this work is to develop a cohesive, high-quality and streamlined assessment strategy, it will be important to go through all recommendations from the Educator Reviewers and to validate or disagree. For each assessment, the project manager should elevate one of the four recommendations to the Working Group:

- **Eliminate and replace with a different assessment**
- **Eliminate and do not replace**
- **Keep and modify the assessment**
- **Keep the assessment as is**

The Working Group also might consider the following possible categories of action:

- **Change the type of assessment altogether**
- **Stop doing in select pilot schools before making a final decision to eliminate**
- **Discuss further (in this case, outline the core issues to be resolved)**
- **Make operational changes, e.g., administration or data reporting**
- **Add an assessment to fill a major gap**

Ultimately, the Working Group or the project manager should emerge with a clear rationale for each recommended change to the district’s assessment strategy. The project manager also should share the recommendations with the C-level sponsor prior to engaging the larger Leadership Team, and ask her to help tee up the key decisions being presented.

ENGAGE LEADERSHIP TEAM IN RECOMMENDATIONS AND DECISION-MAKING

Because assessment cuts across so many central teams and functions, all key district leadership must be aware of and supportive of the recommendations and actions to be taken as a result of this process. The Leadership Team will reconvene to provide final signoff on the Working Group recommendations, or provide input to the recommendations to be ultimately approved by the C-level executive. (In many cases, this will be the CAO, but, depending on the district structure, it may be another C-level or the Superintendent. Your district should have defined this decision-maker in Phase 1).

The Educator Reviewers process will undoubtedly surface complicated issues. For example, two high-quality assessments that overlap in content and/or frequency and/or serve similar purposes should probably not both be given. But which is better? If a high-quality assessment has stakes for students or educators, then the district might want to take the additional step to review the assessments in much more depth, using the [SAP Assessment Evaluation Tool](#) and/or [Quality Checklist](#) to make final decisions about which assessments to keep or which to eliminate.

The Leadership Team will discuss the Educator Reviewers’ findings and the Working Group’s recommendations with an eye towards how best to create a coherent and streamlined assessment strategy, adhering to the initial goals and vision set forth. To effectively engage the Leadership Team, the meeting should begin by recapping the objectives and priorities of this project; describing the process at a high level; and providing a summary of the findings from the process. This will serve to ground the Leadership Team in the broader purpose and context of the recommendations.

Take care not to get bogged down in the minutiae of the simpler recommendations, but rather reserve time for the 2-4 most complex decisions that need to be considered by the Leadership Team. Once the meeting is concluded, all members of the Leadership Team should understand the issues and feel that they can be fully aligned with the final assessment recommendations and action plan.

PHASE 5: LESSONS FROM SYRACUSE

Syracuse issued the following guidance after their process:

Unit assessments should take no longer than one class period

Envision and EngageNY math assessments currently take longer than one class period to administer. While some students can finish in one class period, other students cannot, therefore teachers should use their judgment and foundational documents (standards and shifts) to determine which questions are most important to ask in one class period.

Teachers can modify unit assessments to obtain specific information from students to inform instruction

Teachers should determine what information and data from assessments are needed to inform instructional decisions. Teachers can modify unit assessments as necessary; for example, modifying assessments for English language learners to eliminate language barriers and cultural bias where appropriate.

Unit assessments should not be administered in two different subjects within a week of one another

To the extent teachers are able, unit assessments in two different subjects should be appropriately spaced out so that students are not given multiple unit assessments within a week.

Unit assessments that fall within a week of interim assessments should either be eliminated or rescheduled at the discretion of the teacher or school

Interim assessments, including Math ANet and ELA ANet, are each administered at three different times during the school year. In many cases unit assessments in those subjects fall within a week of these interim assessments. To limit the amount of assessments students take during that period, teachers should try to reschedule or eliminate the unit assessment.

DEVELOP ACTION PLAN TO IMPLEMENT DECISIONS

At the highest level, once the decisions or recommendations are finalized, the Leadership Team should be able to articulate the district response to the following questions:

- **What was the core problem this process was designed to solve?**
- **What assessments have been eliminated? Added?**
- **Why are the remaining assessments important?**
- **How will the remaining assessments be used?**

Now that the Leadership Team has provided its input, the Working Group will develop an action plan to implement the decisions. This action plan will result in an updated assessment strategy, which should include:

- An Assessment Framework, with clear goals and priorities
- An Assessment Map

- A Timeline for Implementation
 - What to tackle for upcoming school year
 - Priorities over the next 2-3 years
- Specific quality assurance steps for assessments in need of improvement
- An ongoing process for review and annual improvements

BUILD PLAN FOR ONGOING MONITORING AND ASSESSMENT REVIEW

//Implementation Tip: Use communications and change management strategy to ensure final recommendations are supported by stakeholders.

The district team should develop these plans that outline the work ahead. This should begin with reconvening Educator Reviewers to share the final decisions and action plan so they can serve as positive ambassadors and speak to the process.

While you don't need to repeat this process every school year, it is important to have checks in place to ensure that the revised assessment system remains current and rigorous. Assign the annual monitoring of assessments to a person or department in the district. As teacher evaluation measures, state assessments, and curriculum choices change, assessments need to be re-examined.

The student assessment inventory is not a one-time event. Districts should regularly re-examine their assessments in light of changing district needs and improvements in available assessments.

-Illinois State Board of Education

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The entire toolkit is a living breathing document. As we continue to support districts in the work of assessment review, we will add and revise helpful tools.

PLUG AND PLAY TOOLS

All of the materials referenced are included in the following table and in the [Dropbox folder](#). If you need access, please email Alice Meyer, ameyer@education-first.com

Playbook	
Type of Material	Material
Tools to use with assessments requiring further review	Assessment Evaluation Tool
	Assessment Quality Criteria Checklist
Timeline for assessment review phases	Sample timeline over one school year

Plug and Play Tools	
Type of Material	Material
Stakeholder communications	Syracuse example stakeholder communications
	One pager on Teaching is the Core (SCSD project)
Background material on assessment	A Primer on Common Core Aligned Assessments
	“What Does a High-Quality Assessment Look Like?”
	Role of Interims in a Comprehensive Assessment System
	CCSSO Criteria for Procuring and Evaluating High-Quality Assessments
	Catalog of elementary assessments
Comprehensive assessment plan examples	Achievement First assessment plan documents
	Syracuse City School District assessment plan
Assessment blueprint examples	Assessment Blueprint examples
Assessment survey inventories	Syracuse City School District survey example
	Achieve inventory
Tools to guide district assessment framework creation process	Annotated agenda from first SCSD meeting
	Deck from first SCSD meeting
Local Assessment Educator Screening Rubrics	LASER Rubrics