Developing a Theory of Action for Your Balanced Assessment System:
How to Develop One and What To Do With It

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Center for Assessment
CCSSO Balanced Assessment SCASS
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Session Objectives

1. Deepen **understanding of theories of action** in the context of balanced assessment systems

2. Make explicit some **key design decisions** that go into constructing and using theories of action for balanced assessment systems

3. Illustrate those decisions and their implications through examples

4. Help the Balanced Assessment Systems SCASS and individual members **move forward** in establishing tools, supports, and theories of action
1. A Reintroduction to Balanced Assessment Systems (BAS) and Theories of Action (ToA)

2. Development of ToA
   - How to write a ToA: structure and process
   - How to use a ToA

3. Example Use Cases:
   - Using interims for summative in accountability
   - Clarifying instructional uses

4. Reconsidering Balanced Assessment Systems and Theories of Action
Please use the chat to pose questions as we go along. We’ll do our best to address questions:

- At the end of each section, or
- In a written follow up after the meeting
A Reintroduction to Balanced Assessment Systems and Theory of Action

1. A Reintroduction BAS & TOA
2. ToA Development
3. Example Use Cases
4. Reconsidering BAS and ToA
Balanced Assessment System

- Definition
- Description & Components
- Criteria
- Barriers

Theory of Action

- Definition
- Description & Components
Section Agenda

Balanced Assessment System

• Definition
• Description & Components
• Criteria
• Barriers

Theory of Action

• Definition
• Description & Components
Balanced Assessment System

Definitions: many, varied, useful, but **not unified yet**

- Working towards: informed, hopefully *common* definition for “Balanced Assessment Systems”

Theory of Action

Definition: Agreement that a ToA describes *how* a goal (outcome) is intended to be achieved; important for informing balanced assessment systems
Definition: Balanced Assessment System
A theory of action outlines the **components of the system**, while clearly specifying the **connections** among these **components**. Most importantly, a theory of action must specify the **hypothesized mechanisms or processes for bringing about intended goals**…the theory of action should describe how the **particular clear goals** will be achieved as a result of the proposed…system(s).

-Marion, Lyons & D’Brot (2016)
<table>
<thead>
<tr>
<th>Balanced Assessment System</th>
<th>Theory of Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Definition</td>
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<tr>
<td>- Barriers</td>
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</tbody>
</table>
What is a Balanced Assessment System?

There are multiple layers of an assessment system.

The purposes and uses of assessment information differ at each layer.

It is important to guard against practices that might have a negative impact on classroom instruction (e.g., teaching to the test, over-testing, narrowing of the curriculum, etc.).
What is a Balanced Assessment System?

Multiple assessments with potentially different designs, sponsored by different people, who are at different levels of control.

Coordinated by a common theory of learning.

Working together to meet a specific use or uses.
### What is being balanced?

Some Different Focal Areas for Creating a “Balanced” Assessment System

<table>
<thead>
<tr>
<th>What</th>
<th>Current</th>
<th>Move Balance Towards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Layer</td>
<td>State</td>
<td>International, national, state, district, school, classroom, student</td>
</tr>
<tr>
<td>Assessment types and information</td>
<td>State summative for individual students, student groups, and schools</td>
<td>District summative, classroom summative, classroom formative, etc.</td>
</tr>
<tr>
<td>Performance aspect</td>
<td>Proficiency status, annual growth</td>
<td>Mastery of competencies, within-year growth, diagnoses of weaknesses, etc.</td>
</tr>
<tr>
<td>Academic content areas</td>
<td>ELA, math, science</td>
<td>Social studies, art, music, health, CTE, etc.</td>
</tr>
<tr>
<td>Whole Child</td>
<td>Academic content areas</td>
<td>Socio-emotional, collaborative problem solving, multicultural, attendance, etc.</td>
</tr>
<tr>
<td>Format/Construct</td>
<td>Thin performance, e.g., multiple choice</td>
<td>Thick performance, “deeper learning”</td>
</tr>
<tr>
<td>Quality/access</td>
<td>Lower quality commercial or local assessments</td>
<td>Higher quality assessments provided or identified by state</td>
</tr>
<tr>
<td>Control</td>
<td>External/top-down</td>
<td>Internal, e.g., student choice/voice</td>
</tr>
<tr>
<td>Commonality</td>
<td>Common, highly standardized</td>
<td>More flexible, more individualized</td>
</tr>
<tr>
<td>Theory of action</td>
<td>Accountability</td>
<td>Instruction, curriculum, etc.</td>
</tr>
<tr>
<td>Focus for reform</td>
<td>Assessments</td>
<td>Curriculum, school structures, etc.</td>
</tr>
</tbody>
</table>
Conceptualizing the Components of a BAS

<table>
<thead>
<tr>
<th>State</th>
<th>District</th>
<th>Classroom</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide Accountability Assessment</td>
<td>District-Wide Middle of Year Interim (e.g., Benchmark)</td>
<td>End of Unit &amp; Mid-Unit Check in Assessments, Weekly Exit Tickets, Daily Conversations</td>
</tr>
</tbody>
</table>

**Levels**
(e.g., Dadey, 2018; Shepard & Penuel, 2018)

**Type or Tier**
(e.g., Perie, Marion & Gong, 2009; Sigman & Mancuso, 2017)

**Purpose**
(e.g., NRC, 2014)

- Monitoring
- Classroom
- OTL

To a large degree, these conceptualizations (or others!) shape how we design systems as well as ToAs.

Regardless of how the system is conceptualized, the “overall” theory of action can and must connect all of the parts together for it to be truly balanced.
Example Levels of Assessment

**State.** Statewide Accountability Assessment

**District.** District-Wide Middle of Year Interim (e.g., Benchmark)

**Classroom.** End of Unit & Mid-Unit Check in Assessments, Weekly Exit Tickets, Daily Conversations

**Intended Use**

- ESSA School Identification & Support
- District Resource Allocation
- Formative Assessment Cycle for Tailored Instruction
Example Levels of Assessment

**State.** Statewide Accountability Assessment

**District.** District-Wide Middle of Year Interim (e.g., benchmark)

**Classroom.** End of Unit & Mid-Unit Check in Assessments, Weekly Exit Tickets, Daily Conversations

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### Which levels are part of our balanced assessment system?

<table>
<thead>
<tr>
<th>Instructional Unit</th>
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</table>

<table>
<thead>
<tr>
<th>Quarter 1</th>
<th>Quarter 2</th>
<th>Quarter 3</th>
<th>Quarter 4</th>
</tr>
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**Intended Use**

- **ESSA School Identification & Support**
- **District Resource Allocation**
- **Formative Assessment Cycle for Tailored Instruction**
Defining our balanced assessment across all of these levels has implications for the ToA.

The “overall” ToA must work across levels to meet intended uses.
Unbalanced systems are usually a result of unbalanced theories of action

- Theories of action for separate parts of the system are separated from one another, or at worst at odds with one another

For example:

- Accountability based systems of school identification and support are completely divorced from the day-to-day formative assessment practices that are used to determine instructional next steps

Goal: ensure that the “smaller” theories to work together

- In addition, the “overall” ToA may be one part of a larger system of reform (i.e., a larger ToA)
Some Implications

❖ Each assessment within a system typically has its own ToA “baggage,” which can be explicit or implicit
  ▪ Each level generally has pre-existing assessments that need to be considered – we never start from a blank assessment slate.

❖ Assessment systems and theories of action are interconnected
  ▪ Making a decision about one has implications for the other. Iteration is often needed.

❖ A system of assessments might be of high quality, but if it does not fit the overall theory of action, then the system’s use will likely not result in the intended outcomes.
A theory of action outlines the **components of the system**, while clearly specifying the **connections among these components**. Most importantly, a theory of action must specify the **hypothesized mechanisms or processes for bringing about intended goals**...the theory of action should describe how the **particular clear goals** will be achieved as a result of the proposed...system(s).

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*Marion, Lyons & D’Brot (2016)*
What is a Theory of Action?

A logical argument that connects the goals of a system to its component parts

By describing the actions and conditions that lead to the goals

as well as the rationales, assumptions and evidence that support and justify the connections within the system
Conceptualizing the Components of a ToA

Logic Model
(e.g., Frechtling, 2007, W.K. Kellog Foundation, 1998)

Driver Diagram
(e.g., Bennett & Provost, 2015)

Like with BAS, these conceptualizations (or others!) shape how we design our ToA. And the design of ToA influences our BAS.

We present theories of action graphically. Others use formats like tables (e.g., SCILLSS, 2017, p. 5). There is no one correct format and each application is tailored by the developer.
Example Levels of Assessment

**State.** Statewide Accountability Assessment

**District.** District-Wide Middle of Year Interim (e.g., Benchmark)

**Classroom.** End of Unit & Mid-Unit Check in Assessments, Weekly Exit Tickets, Daily Conversations

<table>
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Intended Use

**ESSA School Identification & Support**

**District Resource Allocation**

**Formative Assessment Cycle for Tailored Instruction**
A naïve, over simplification of a hypothetical state plan

ESSA School Identification & Support

A fully developed ToA would elaborate each box and connection, as well as provide rationales, assumptions, and evidence.

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Action Mechanisms</th>
<th>Effects</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>School Accountability Classification (CSI &amp; TSI)</td>
<td>Development &amp; Implement Turn Around Plan</td>
</tr>
<tr>
<td></td>
<td>Direct Technical Assistance</td>
<td>Establish Community of Practice</td>
</tr>
<tr>
<td></td>
<td>Development</td>
<td>Professional Development</td>
</tr>
<tr>
<td></td>
<td>Plan</td>
<td></td>
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<tr>
<td></td>
<td>School Environment Improves</td>
<td></td>
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<tr>
<td></td>
<td>Annual Monitoring</td>
<td>Additional Funds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Adjustments to Plan</td>
</tr>
</tbody>
</table>
ESSA School Identification & Support

A naïve, over simplification of a hypothetical state plan, redux.

<table>
<thead>
<tr>
<th>Identification Triggers Support</th>
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<td>Support Includes:</td>
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<td>- Direct Technical Assistance to Develop and Enact a Turn Around Plan with Initiatives to Improve Practice</td>
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Support Includes:
- Direct Technical Assistance to Develop and Enact a Turn Around Plan with Initiatives to Improve Practice
- Additional Funds
- Annual Monitoring

Students are Provided with Individualized Supports (both Academic and SEL)

Student Achievement Improves
How do we ensure that all of our “small” ToAs work together? (i.e., function as a single large ToA?)
How do we ensure that all of our “small” ToAs work together? (i.e., function as a single large ToA?)

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<td>Formative Assessment Cycle for Tailored Instruction</td>
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Many states have provided interims in the hopes of building greater connections across the state and district levels (see Dadey, 2019)
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Characteristics/Criteria of Balanced Assessment Systems

- Comprehensiveness
- Coherence
- Continuity
- Efficiency
- Usefulness

See NRC, 2001 for the original criteria; see Chattergoon, 2016 and Chattergoon & Marion, 2016 for an updated set of criteria, which includes efficiency and usefulness.
Barriers to Balanced Assessment Systems

- Politics and policy
- Commercialization and proliferation of assessments
- Lack of assessment literacy
- Insufficient attention placed on curriculum

See Marion et al. (2019a) and for even more detail, see Marion et al. (2019b)
Takeaways

**BAS and ToA:**

1. Are interconnected, requiring iterative development.
2. Have components that can be defined in varying ways, each of which has implications for development.
   - Inclusion or exclusion of a particular component does not automatically make an assessment system balanced.
3. Must address pre-existing assessments and their supporting theories of action.
4. Must be organized under a single “large” or overall ToA.
   - Connecting disparate components (e.g., classroom and state) is very challenging.
The development of a balanced assessment system starts with the development of a draft overall theory of action, and

Developing a theory of action starts with clearly identifying the problem(s) to be solved.
As part of a formal framework or process, like *Root Cause Analysis*

As part of a large design framework, like *Human Centered Design* or the *Job to Be Done Framework*

Or through a more “heuristic” problem solving approach, which asks:

- How do we to get from “what is” to “what is desired”
Any questions? We’ll take a few minutes to address them.
Developing a Theory of Action

1. A Reintroduction BAS & TOA
2. ToA Development
3. Example Use Cases
4. Reconsidering BAS and ToA
Our main points

- A **problem-solving framework** is useful for developing a theory of action and associated balanced assessment systems.
- There are **many dimensions** along which assessment systems may be balanced.
- The dimensions you choose and where you decide the relationships are balanced appropriately depend upon your theory of action: what you want to do and how you think that can best be achieved.
- A complex system consisting of multiple nested parts may require **multiple theories of action**.
Problem-solving framework for ToA

Current situation  ➔  How to get from “what is” to “what is desired”  ➔  Desired situation

This is the problem to be solved.
Your “theory” of action is your best hypothesis of how to solve that problem.
Self-Reflection Part I: My Theory of Action

What is your theory of action, in brief?
“To achieve ____________,
the state should do _____________________________.

A balanced assessment system, consisting of __________________________ will help by _____________________________.

Current situation → How to get from “what is” to “what is desired” → Desired situation
Elaborate your theory of action

Current situation
Pre-cursor

BAS Part 1
Balanced assessment

BAS Part 2

Other component

Expanded process

Desired situation
Developing a theory of action: structure

- Start with “big picture” “elevator speech” of the system

- Fill in
  - Add more parts of the system
  - Break parts into smaller parts (components)
  - Break steps into small steps (often arrows)
  - Add important details: who, when, resources needed

- Attend to likely challenges
  - Recognize and bolster key parts
  - Specify how transitions in governance will be kept aligned
  - Identify things that are new, haven’t been done up to now
  - Identify areas where there are counter-pressures
  - Identify ways unintended negative things could happen
A theory of action is a necessary starting point to identify gaps and needs.

- What is the role of assessment in our vision of teaching and learning?
- What type of assessment information is needed to support that vision?

This becomes a point of reference by which to evaluate all future decisions.
"Elevator speech" ToA: samples

<table>
<thead>
<tr>
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<th>ToA 2</th>
<th>ToA 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>To reduce gaps and ensure no child is left behind…</td>
<td>To reduce gaps and ensure every student is college/career ready…</td>
<td>To support every child pursuing her/his own dream, maximizing her/his own talents…</td>
</tr>
<tr>
<td>ToA</td>
<td>Schools will be held accountable that all children achieve proficiency on common standards, as measured by trustworthy assessments; schools and students that do not will receive supplemental supports</td>
<td>Teachers and students will be provided strong, equitable opportunities to learn, directed by instructional assessments and supports designed to prevent children falling behind</td>
<td>Curriculum and schooling will support students pursuing individual interests, strengths, and plans; assessments will help students demonstrate competency and move on when ready</td>
</tr>
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### “Elevator speech” ToA: samples

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</tr>
<tr>
<td><strong>BAS</strong></td>
<td>The state summative assessment will be balanced by providing more instructionally useful information multiple times during the year</td>
<td>Assessments will support educator uses: diagnostic (within class period), diagnostic (across class periods), and district (comparative for program evaluation)</td>
</tr>
</tbody>
</table>
Developing a theory of action: process

- Conceptual development
- Fostering of political will and support
- Implementation support
- Refinement
Use of a theory of action

- **Direct development** of balanced assessment system, e.g., design of information needed to support intended inferences and actions:
  - Who is the report **about**?
  - Who is the report **for**?
  - What are they supposed to **do with the report**?

- **Structure validation of assessments**, especially evaluation of consequential aspects

- **Direct** program **evaluation of intended interventions** for improvement (formative evaluation) and decisions about adoption/retention (summative evaluation)
A Way Forward

4 Strands of Work to Facilitate and Support Progress Around Balanced Assessment Systems (Marion, et.al. 2019)

- Conceptual – focused on clarifying the concepts and criteria defining a balanced assessment system
- Practical – focused on determining what it takes to design and implement assessment systems in practice (e.g., partnerships, tools, resources, training)
- Research & Evaluation – focused on establishing a clear research model to evaluate the impact of interventions
- Policy – clarifying the role and impact of the policy context
Any questions? We’ll take a few minutes to address questions from chat.
Developing a Theory of Action for Your Balanced Assessment System: How to develop one and to do with it

3. Example Use Cases

1. A Reintroduction BAS & TOA
2. ToA Development
3. Example Use Cases
4. Reconsidering BAS and ToA
Example Use Case #1

Using interim assessments to provide summative scores and determinations
An emerging area of interest has been around the use of interim assessments* to replace summative state assessment (e.g., Gong & Dadey, 2018).

The goal of such interest is to maintain the current theories of action that are currently supported by the state summative assessments and interim assessments.

- Essentially, supporting multiple smaller theories of action based on the interim assessments, which ideally act as a balanced assessment system.

*Here we use the term interim broadly, to include terms like “through course”.*
What theories of action are the interims meant to support? E.g., currently implemented, new, or both?

- District Wide Middle of Year Interim (Benchmark)
- End of Unit & Mid-Year Check in Assessments, Weekly Exit Tickets, Daily Conversations
- Instructional Unit
- Instructional Unit
- Quarter 1
- Quarter 2
- Quarter 3
- Quarter 4

Intended Use

- ESSA School Identification & Support
- District Resource Allocation
- Formative Assessment Cycle for Tailored Instruction
### Example Levels of Assessment

#### State
- Statewide Accountability Assessment

#### District
- District-Wide Middle of Year Interim (e.g., Fall, Winter, Spring)

#### Classroom
- End of Unit & Mid-Unit Check in Assessments, Work Assignments, Class Discussions

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#### Intended Use

- **ESSA School Identification & Support**
- **District Resource Allocation**
- **Mastery Checks on Prioritized Content for Tailored Instruction in Next Quarter**

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We skipped a huge step – problem definition – for the purpose of illustration.
Resulting Questions from Defining the ToA(s)

- Can all of these ToAs be supported?
  - Can we define them with enough detail?
  - Can we ensure that they connect well enough to function as a whole?

- Can we develop and implement an interim assessment design that will support these theories of action*?
  - How many assessments?
  - What will each assess?
  - When will they be administered?
  - What will be reported?

*Questions drawn from Gong & Dadey, 2018
How many assessments?
- Four (last will not inform quarterly instruction)

What will each assess?
- "Modular-block" design, in which large chunks of the domain are measured, divided up by the implied by pacing of popular curriculum (as opposed to "full-scope" or "modular-standards" designs)

When will they be administered?
- Based on school and district curricular pacing guides, with 2 weeks leeway. The order of the assessments is fixed.

What will be reported?
- Mastery of concepts or "big-ideas" from each quarter
Example Levels of Assessment

State.

District.

Classroom.

Instructional Unit

Instructional Unit

Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4

How do we create a single summative score to support these ToAs?

Computing such a score is easy compared to deciding what the score should mean (i.e., its interpretation) in relation to the ToAs.

Example ToAs

- ESSA School Identification & Support
- District Resource Allocation
- Mastery Checks on Prioritized Content for Tailored Instruction in Next Quarter
- Formative Assessment Cycle for Tailored Instruction
Example Levels of Assessment

State.

District.

Classroom.

How do we create a single summative score to support these ToAs?

How will performance during the year be addressed?

Example ToAs

- ESSA School Identification & Support
- District Resource Allocation
- Mastery Checks on Prioritized Content for Tailored Instruction in Next Quarter
- Formative Assessment Cycle for Tailored Instruction

Instructional Unit

<table>
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Example ToAs

- ESSA School Identification & Support
- District Resource Allocation
- Mastery Checks on Prioritized Content for Tailored Instruction in Next Quarter
- Formative Assessment Cycle for Tailored Instruction

How will performance during the year be addressed?
Example Use Case #2
Using interim assessments to inform instruction/learning
What does it take for assessments to “inform instruction”?

1. Aimed for learning
2. Matched to possible instruction
3. Timely action: When did you know? What did you do?
4. Adds value
1. Aim for learning

- Instructional assessments are intended to foster student learning (whether shorter-cycle or longer-cycle)
- Therefore, instructional assessments are *anti-summative*—they should not be used as summative because they are intended to change what the student knows and can do from what was demonstrated on that assessment
  - If the students don’t get better after an instructional assessment, something isn’t working (true for reporting “strengths/weakness” or predicting “projected end of year performance”)
  - Might have a “paced learning claim”: “the student did this well at learning at the rate under the conditions that were laid out”
2. Assessment should be matched to how varied instruction can be.

Instruction can vary for every student, every part of a lesson, every class, every time, every year, every teacher, every school, etc.

Instruction will be the same for every student, every part of a lesson, every class, every time, every year, every teacher, every school, etc.
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Instructional/Learning Environment & Repertoire
2. Assessment should be matched to how varied instruction can be

Instruction can vary for every student, every part of a lesson, every class, every time, every year, every teacher, every school, etc.

Instructional/Learning Environment & Repertoire

"What should I do?"
"What can I do?"

Instruction will be the same for every student, every part of a lesson, every class, every time, every year, every teacher, every school, etc.
Tailored instruction requires

- Instructionally sensitive assessment AND
- Assessment-sensitive instruction

Instruction can vary for every student, every part of a lesson, every class, every time, every year, every teacher, every school, etc.

Instruction will be the same for every student, every part of a lesson, every class, every time, every year, every teacher, every school, etc.

"What should I do?"
"What can I do?"
3. Timely action: When did you know? What did you do?
3. Timely action: When did you know? What did you do?

Increase high school graduation → decrease dropouts
Decrease dropouts → increase credit accumulation
Increase credit accumulation → make-up summer school

Start of year → Q1 → Q2 → Q3 → End of Summer of year

Determine "no credit" → Provide credit-recovery summer school
3. Timely action: When did you know? What did you do?

Increase CCR → increase EOY proficiency
Increase EOY proficiency → check interim proficiency
Low interim performance → supplemental instruction

Start of year → Q1 → Q2 → Q3 → End of year

Needs help

Determine “needs help”

9 weeks
45 school days
4. Assessment adds value

- What value does this assessment add?
- Does it overlap with another assessment?
- Is it better: more accurate, more informative, more credible, cost-efficient, easier to use, etc.?
- Where does it fit in your system of assessments?
- Where does it fit in other users’ systems?
Balanced assessment system to support better instruction/learning

- Aimed at learning
- Variable with instruction
- Timely
- Adds value
Any questions? We’ll take a few minutes to address questions from chat.
Reconsidering Balanced Assessment Systems and Theories of Action

1. A Reintroduction BAS & TOA
2. ToA Development
3. Example Use Cases
4. Reconsidering BAS and ToA
Summary: Balancing Assessment Systems and Theories of Action

- The state’s theory of action should propose clearly how a problem will be solved, and how the balanced assessment system will help
- The theory(s) of action and balanced assessment system should be developed together, iteratively
  - Attend to process that develops the conceptual clarity of the theory(ies) of action, the capacity to implement, and the commitment to sustainably put into action, evaluate, and refine
- Spanning very different purposes and governance (e.g., state, district, classroom) are current challenges being worked on for theories of action and balanced assessment systems
What would you like to do next to develop your theory of action for balanced assessment systems?

What do you think would be helpful to most states and the field?

What could the Balanced Assessment Systems SCASS do to help?

- What would you make high priority? Medium priority? Lower priority?