

Session 2B: Practical Guidebook

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REIMAGINING BALANCED ASSESSMENT SYSTEMS



Despite the valuable contributions made by the new NAEd volume, it is **too conceptual and abstract** to **guide district and school leaders** as they wrestle with design and implementation decisions regarding balanced assessment systems.

The NAEd project leaders and steering committee envisioned a **companion guidebook** from the outset of the project.

Implementing Balanced Assessment Systems:
A Practical Guidebook for Districts and Schools

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This practical guide was written to help **district and school education leaders** implement the teachings from *Reimagining Balanced Assessment Systems*.

We also intend for **state leaders** to use this guide to best support local education systems move towards more balanced assessment systems.

<https://tinyurl.com/RILS2025-0>

We hope this Practical Guidebook helps translate the research into practical support for leaders and teachers as they engage in this vital work.

It should help practitioners ask and answer the following types of questions...

- ✓ Why do we give the assessments that we do?
- ✓ Are leaders and teachers using the assessment information we are collecting? If so, how? If not, why not?
- ✓ How would we know our assessment system is working as intended and supplying the right information, at the right time, to the right users?
- ✓ How could we improve our assessment system? What practical tools, resources, and guidance are freely available for use?



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Introduction &
Background

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Threats to Balance

- Common Threats to Efficiency
- Common Threats to Usefulness
- Common Threats to Coherence

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Practical Next Steps

FIGURE 2-1 Eight threats to balanced assessment systems.

Common Threats to Efficiency:

Threat 1: Too much testing overall, particularly early or later in the year.

Threat 2: Redundant assessments.

Threat 3: Unused assessment results.

Common Threats to Usefulness:

Threat 4: No clear match between the assessment purpose and design.

Threat 5: Assuming all tests can inform instruction.

Common Threats to Coherence:

Threat 6: Inconsistency between assessments and instructional vision.

Threat 7: Policies that distort practice.

Threat 8: Over-emphasizing the role of summative assessment.

Threat 1

Too much testing overall, particularly early or later in the year

Explanation

No matter how useful assessment is, there is only so much data that leaders and classroom teachers can use. While there is no hard and fast rule about how much testing time is too much, the U.S. Department of Education suggested in non-regulatory guidance that no more than 20% of instructional time should be spent on state testing.³ It is hard to imagine that many leaders want to intentionally layer on district- and school-required tests well beyond that threshold.

Beyond just the overall amount of testing, when that testing occurs can also be problematic. For example, the amount of testing early or later in the year can become excessive if not carefully monitored. Decisions can be made in silos without considering the totality of assessments already in place. Early elementary students are often bombarded with universal screeners early in the year and prep for the state test later in the year. Elementary and middle school students take multiple interim assessments early in the year. For multilingual learners or students with disabilities there are likely additional assessments which can result in less instructional time. Similarly, for students in Tier 2 or 3 interventions, the frequency of progress monitoring assessments needs to be monitored.

Multiple sources of assessment information can be very useful to build a more complete picture of students' strengths and to identify students who may need additional support and interventions; however, it can also be a distraction if the information provides conflicting information or is not used to make different decisions for students than would be made using existing assessment information from the previous year.

Look-Fors

- Count up the number of instructional minutes the general education student spends taking teacher-, school- or district-required assessments across the four core content areas in each grade (Count everything except for day-to-day formative assessment practices). There is no correct answer for the amount of time spent, however, interest holders with various perspectives should discuss whether they believe it to be too much or about right?
 - Consider how much time is lost to instruction for assessment. In a school year of about 180 days (1080 to 1200 hours), 120 hours of testing would mean that a student spent at least 10% of their time on assessment, and likely more considering time lost of assemblies, field trips, or other school events.
- Look specifically at the number of instructional minutes students in each grade spend taking tests in the first two months of the school year and the last few months across the core content areas. Do interest holders consider this a reasonable trade-off?

Vignettes that Address this Threat: [Katy ISD](#), [Cupertino Union SD](#), [Oregon DOE](#), [Connecticut DOE](#), [Wisconsin DPI](#), [Pennsylvania DOE](#)

See Chapter 7/Local Control (p. 208) of *Reimagining Balanced Assessment Systems* for more information related to this threat.

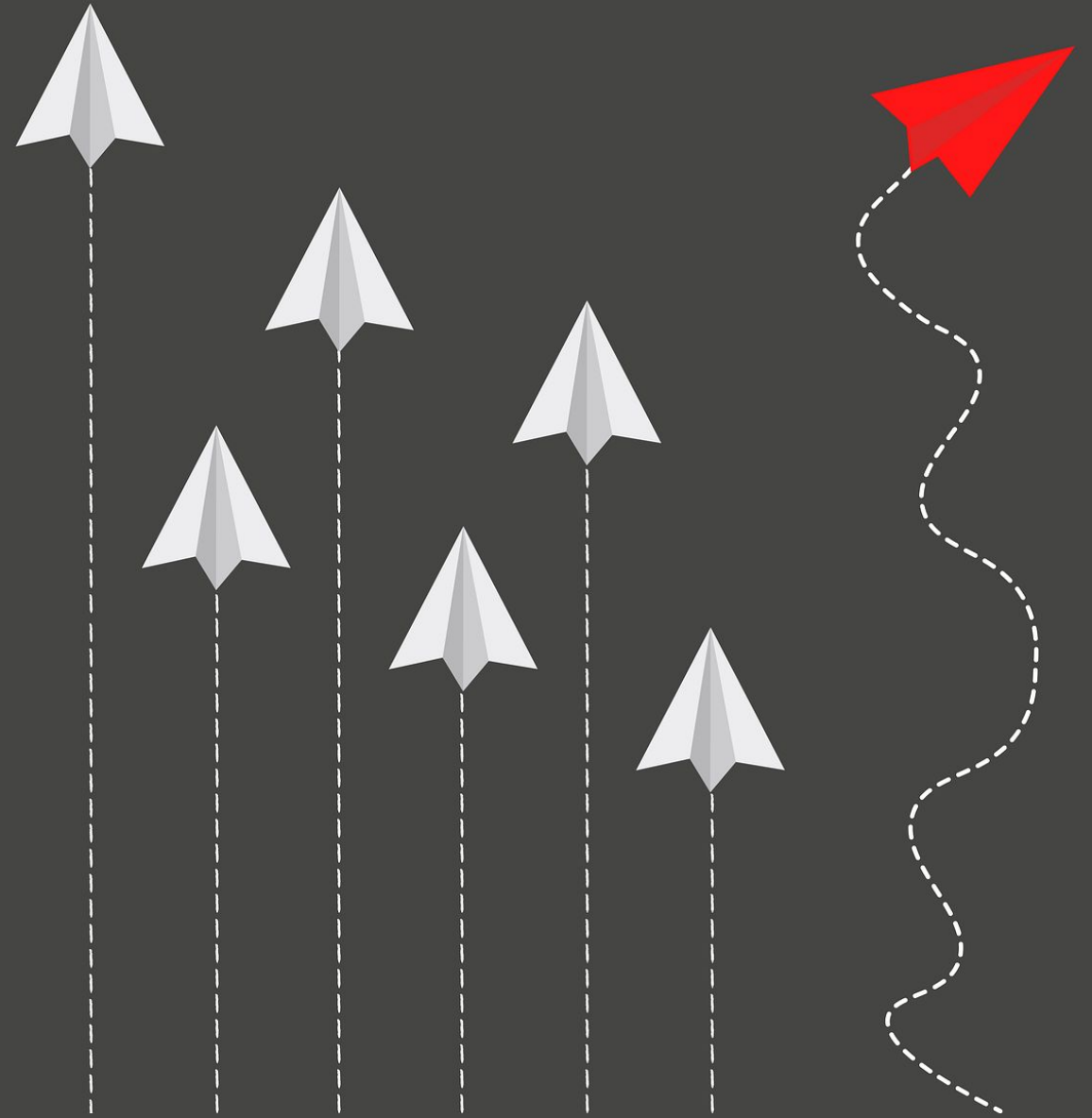
Practical Next Steps: What can a district or school do to investigate and evaluate threats to efficiency?

TABLE 2-1 Possible Strategies, Tools and Resources to Further Explore Common Threats to Efficiency

Threats & Indicators	Strategies	Selected Tools and Resources
Threat 1: Too much testing overall, particularly early or later in the year	<ul style="list-style-type: none"> •Information gathering (e.g., surveys or focus groups with students, teachers or leaders) to explore perspectives on the amount or type of testing, and use or non-use of results •Assessment System Auditing Tools (see the column to the right) 	<p>Open-access tools that support an assessment system auditing process:</p> <ul style="list-style-type: none"> •Assessment System Review Online Learning Path (2.0 Version) by the Center for Assessment & California Collaborative for Educational Excellence (online modules, videos, and tools) •Fewer and Better Local Assessments: A Toolkit for Educators (Playbook) by EducationFirst (online toolkit with rubrics and other tools; accompanies Achieve’s inventory) •Student Assessment Inventory for School Districts by Achieve (online inventory tool and guidance document) •Assessment Inventory Project by the Georgia Partnership for Excellence in Education (online inventory tool, facilitation guide, and other resources) •Assessment Inventory Resource by The Center on Standards & Assessment Implementation (online inventory tool and evaluation criteria with questions)
Threat 2: Unused assessments		
Threat 3: Redundant assessments		

Note:

We've asked our panelists and presenters to intentionally connect to the threats when and where it makes sense.



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Background

- After creating the shortlist of the most common threats to balance, **we wanted to check our understanding** against others who we know are working in this area.
- We selected a **purposive sample of district and state education agency leaders** and **interviewed** them for about one hour to get their perspectives on two key questions:
 - Do you agree with these common threats to balance? What do you think is missing, erroneous, or needs to be revised?
 - What have you done as a district or state leader (or worked with others to do) to address one or more of these threats to balance? How did you do that, and what was the result?

DISCLAIMER

We do not claim that this purposive sample is representative or generalizable; however, we believe it provided us with valuable insights that helped refine our original list and offered examples of how districts and states are approaching balanced assessment systems.



The goal of these interviews was to capture real-life experiences and stories, infusing what is often a more conceptual or theoretical conversation about balanced assessment systems with practical examples written as vignettes.



We don't expect any example to show a perfectly balanced system—balance exists along a continuum after all—it is not an on/off switch.



We also do not expect any one example to be comprehensive and cover all threats, but we hope with a wide range of examples, districts or schools can identify areas they could tackle to improve balance in their assessment system.

TABLE 3-1 Crosswalk between Vignettes and Common Threats

	Katy ISD	HSSD	CUSD	CCS	OR	CT	WI	PA
Common Threats to Efficiency:								
Threat 1: Too much testing overall, particularly early or later in the year.	✓		✓		✓	✓	✓	✓
Threat 2: Redundant assessments.	✓				✓	✓	✓	✓
Threat 3: Unused assessment results.	✓	✓				✓	✓	✓
Common Threats to Usefulness:								
Threat 4: Not having a clear match between the assessment purpose and design.	✓				✓		✓	✓
Threat 5: Assuming all tests can inform instruction.	✓				✓			
Common Threats to Coherence:								
Threat 6: Inconsistency between assessments and instructional vision.		✓		✓	✓		✓	
Threat 7: Policies that distort practice.	✓				✓	✓		
Threat 8: Over-emphasizing the role of summative assessment.			✓					

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Practical Next Steps

At the end of the day, local education agency leaders may simply ask:

- ***What should we do first?***
- ***How should we start or continue on this journey?***

To answer these questions, we looked back to the *Practical Next Steps* we identified under each Threat to Balance Category and pulled out a few high-leverage actions in Table 4-1.

TABLE 4-1 High-Leverage Actions to Explore Threats to Balance

<i>IF</i> you are concerned about the efficiency of your local assessment system because there seems to be over-testing, unused or redundant assessment data....	...THEN we recommend you start with a local assessment system review or audit (see TABLE 2-1).
<i>IF</i> you are concerned about the usefulness of your local assessment system because there seems to be a mismatch between assessment design, purpose, and use, and general confusion about why all tests don't directly inform instruction....	...THEN we recommend you start with building the knowledge and skills of your leadership team to better understand how assessments are designed and how that impacts the intended versus actual use of different types of assessment (see TABLE 2-2). Leaders are then able to work with teams of teachers and others to critique specific locally-used assessment designs in the light of intended purpose and use.
<i>IF</i> you are concerned about the coherence of your local assessment system because there seems to be inconsistency between the assessments given to students and your district's mission or instructional vision...	...THEN we recommend you start with either creating or reviewing your district's instructional vision and evaluating the alignment among the curriculum materials, instructional practices, and assessments administered (see TABLE 2-3 and Appendix B).
<i>IF</i> you are concerned about the coherence of your local assessment system because policies seem to be shaping practices in ways you don't think are right, or there is an outsized focus on summative assessments...	...THEN we recommend you learn more about assessment culture and evaluate if systemic shifts are needed to support the implementation of best practices (see TABLE 2-3 and Appendix A).

Session 6B Tomorrow

- This Practical Guidebook is in **DRAFT** form because we wanted to get your feedback before finalizing.
- Tomorrow, we are going to give you the time and opportunity to give us feedback on what you like and think could be improved (missing, wrong, misleading, partially correct) with the Practical Guidebook.
- It would really help if you've read at least **Section 2: Threats to Balance** ahead of time as that will be the focus of the discussion. **If time, we'll talk about Sections 3-4.**