



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

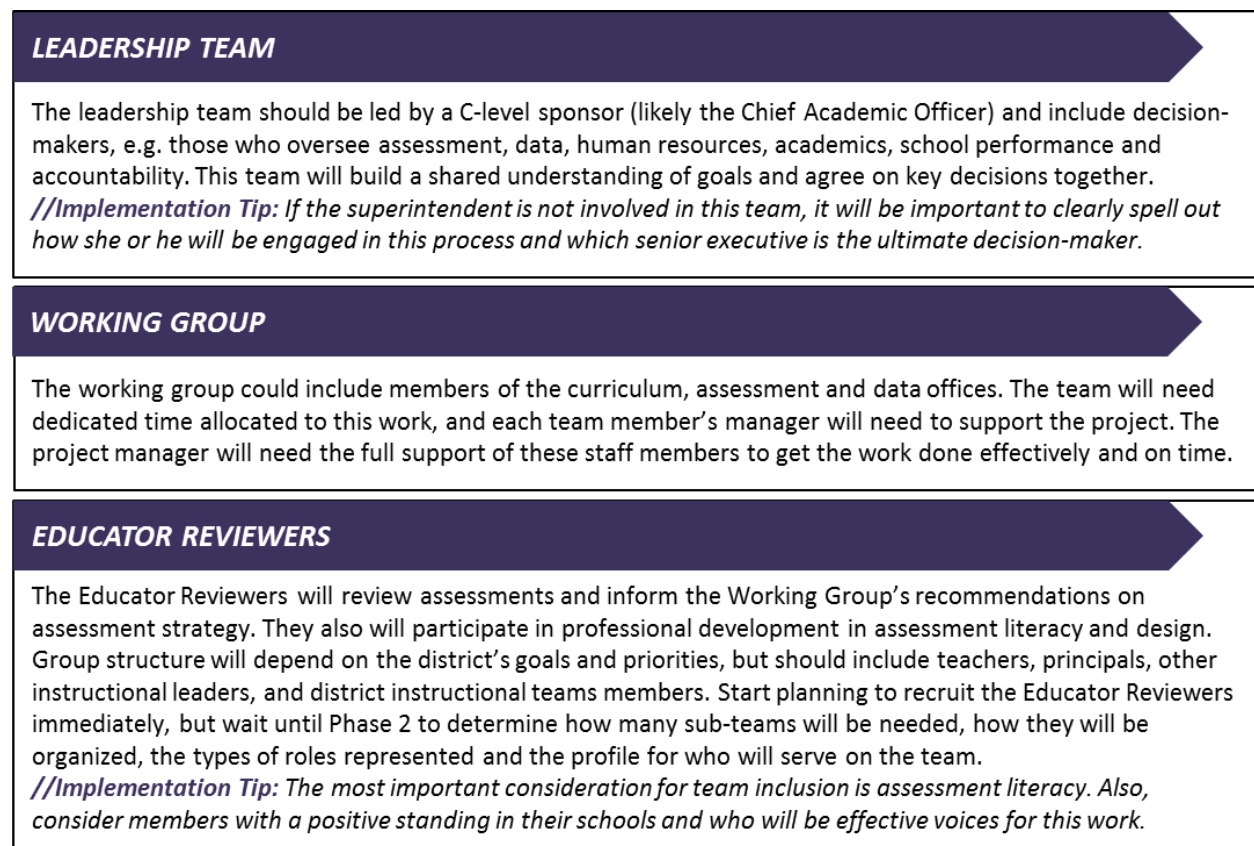
as well as school leaders and teachers. Be sure to select a team member, ideally someone reporting directly to a Chief, who has the bandwidth to focus on managing this project. The specific amount of time will depend on the scope of the project, but as a reference point, in Syracuse, a mid-size urban 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.

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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.

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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.