



## 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.