Evidence Cluster #1:

An Analysis and Accompanying Action Plan for Impacting

Student Learning and Development

by

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A paper submitted for

Add-On School Administration licensure portfolio requirements

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April 2013

Abstract

In 2007 Leeds Middle School was deep in No Child Left Behind sanctions and had the lowest school proficiency scores in the district. After several years of intense school improvement reforms including a principal coach and instructional coach, the school was out of sanctions, a NC School of Distinction, and had achieved high growth for three straight years. However, in 2012 those achievement scores dropped remarkably, and school data sources showed a narrow instructional program focused intensely on standardized test preparation and remediating below-grade level, sub-group students. My action plan proposes research-based professional development on formative assessment strategies that will help teachers monitor progress and use a variety of instructional strategies to improve achievement for *all* students.

Evidence Cluster #1: Impacting Student Learning and Development

Over the last several years, Leeds Middle School (LMS) has been committed to improving its overall instructional program. Intense professional development on research-based instructional best practices for teachers and multiple remediation opportunities for students have been successful and widely-supported as evidenced by consistent gains in student achievement scores over the last five years and positive feedback on the last two NC Teacher Working Conditions Surveys (NCTWCS). Nonetheless, student achievement took a marked dip in all areas at the end of the 2011-12 year. This may have been due to significant staffing changes including five initially licensed teachers teaching a tested subject for the first time. However, it could also be attributed to an over-emphasis on remediation, teacher-directed instruction, and an underutilization of meaningful formative assessment strategies aimed at monitoring learning for all students rather than just a targeted few.

According to 2011-2012 NC School Report Card, LMS serves approximately 674 students in grades six through eight. The average class size for the 2011-2012 school year was approximately 23 students, and those classrooms reflect the same high degree of diversity as the surrounding community. There are currently six sub-groups, and LMS met 23 out of 25 indicators as recognized by the No Child Left Behind (NCLB) legislation. In addition to 88 Exceptional Children and 52 academically/ intellectually gifted students, LMS has significantly more African-American, Limited English Proficient and Hispanic students than any other middle school in the county. Although the school no longer accepts Title I funds, 75% of the student population still qualifies for and receives free and reduced lunch according to the 2012 LMS School Improvement Plan data.

Instructional Program Reform

According to the 2012 School Improvement Plan data profile, the overall student achievement proficiency for students at LMS was only 61.2% in 2008. Yet, by 2011, our overall student achievement rose 22.2% percent, and LMS was a School of Distinction under the North Carolina accountability program. Our tremendous growth may be attributed in part to a concentrated effort to improve the instructional program through professional development and an emphasis on both in-school and after-school remediation for below grade level students.

Under the guidance of a mandated principal coach and a grant funded instructional coach, the teachers at LMS engaged in sustained, research-based professional development beginning early 2007. Topics included a focus on high-yield strategies from Marzano's *Classroom Instruction that Work* and a school wide emphasis on effective vocabulary instruction as defined by Marzano's *Building Academic Vocabulary*. The professional development format was largely whole group at after-school faculty meetings or planning period presentations. In addition, the administrative team led the faculty through book studies and brought in guest speakers to help the staff work more effectively with students from diverse, low-socioeconomic backgrounds and middle school teaming concepts in general. For three years, our faculty met at least two times a month in on-going, site-based professional development. After any whole group professional development, teachers were required to implement the strategies and share evidence of implementation weekly at PLC meetings as well as faculty meetings.

Besides increased professional development, school improvement efforts also focused on using end-of-grade and district benchmark test scores to target students with adequate-yearlyprogress (AYP) subgroups for remediation. These "very important students" or "VIPs" as they were called were students that fell into multiple sub-groups and, therefore, counted several times within school AYP scores. In addition to three small group reading and math remediation courses that ran during the elective schedule, the teachers also pulled VIP students during homebase and after-school for additional help on the end of grade assessments. All these programs focused heavily on test preparation strategies and primarily utilized commercially prepared practice tests. The emphasis was generally on below grade level students, especially those VIP students falling into multiple sub-groups, and was usually at the expense of higher achieving students. Initially, these reforms seemed to pay off as student achievement on end-ofgrade tests rose dramatically over a short period, but in 2012 student achievement declined.

Overemphasis on High Stakes Testing

While a strict top-down, whole school approach to improving teaching and learning did indeed coincide with an increase in achievement scores at LMS, it also created an over-emphasis on high stakes testing. Research shows that the pressure to raise test scores can create a greater emphasis on math and reading and test-taking skills in general may superficially benefit some populations, but it does so at the expense of providing a challenging and integrated curriculum for all students (Cawelti, 2006; Darling-Hammond, 2007; Smyth, 2008). In fact, in a limited study by Musoloeno and White (2010), they noted that NCLB's high-stakes testing component had impacted both instructional content and instructional time. They note that "sufficient time for students to explore and discover is being replaced by carefully scripted programs—ones that prepare students to perform well on tests" (p. 4). Their study also showed declines in cooperative learning and increases in teacher-directed instruction. Like LMS, teachers in the study reported that students were often homogeneously grouped in either remedial elective classes or after school programs. Indeed, these shifts indicate a tension between the priorities of schools seeking to meet their AYP goals and remain true to the middle school philosophy of educating the whole

child. However, teachers are also constricted by an over-emphasis high stakes testing with feeling discouraged by a lack of creativity and flexibility (Cawelti, 2006; Musoloeno & White, 2010). While cooperative and inquiry based learning strategies may appeal to both the creativity of the teacher and the social and emotional needs of the student, they are not as generally valued in high-pressure, high-stakes environment that emphasizes test accountability.

"Inform" ative Assessment

While testing and accountability are not dirty words, the goal for educators should be the same as it is for students—that the quality of learning will matter more than the grade at the end. Unfortunately, Heritage (2007) argues that in today's hyper-sensitive accountability culture "...assessment is not regarded as a source of information that can be used during instruction. Instead, assessment has become a tool for solely summarizing what students have learned or for ranking students and schools" (p. 140). For that reason, Black, Harrison, Lee, Marshall, and Wiliam (2004) specifically call for a shift to assessment for learning or formative assessment where assessment influences learning instead of just measuring it. Formative assessment is distinctly different than summative state tests or district benchmarks that predict student success by providing periodic snapshots of student learning rather than a "video stream" that provides constant feedback to both the teacher and student (Heritage, 2007, p. 141). Thus, formative assessment is best defined as instructional feedback gained day-to-day, minute-by-minute to adapt teaching and learning and keep all students engaged and progressing toward clear learning targets (Heritage, 2007; Shepard, 2005; Wiliam, 2011). Heritage (2007) goes on to identify three types of formative assessment: on the fly assessment that requires teachers to make on the spot inferences to adapt instruction, planned-for interactions where teachers specially pre-design questions to determine what students know, and curriculum-embedded assessments which are classroom activities that students and teachers use to measure student progress.

However, effective formative assessment isn't just a single instructional strategy or moment in the lesson. It is a process that begins with finding out what learners already know, setting goals for where they are going, and then designing instruction that will help them get there (Wiliam, 2011). Indeed, Shepard (2005) likens formative assessment to scaffolding while Brookhart, Moss, and Long (2008) and Heritage (2007) draw connections to differentiation that allows teachers to move students from where they are to where we want them to go. Students also need specific feedback focused on their performance toward a goal (Black, Harrison, Lee, Marshall, Wiliam, 2004; Heritage, 2007; Shepard, 2005). Feedback is essential for helping teachers determine the next learning step, and it can keep students engaged in their learning.

However, pre-service teacher education programs generally provide little instruction on how to assess students. In order to be successful implementing formative assessment strategies, Heritage (2007) writes that teachers need a specific knowledge base. First, teachers must have a strong content foundation to identify appropriate curriculum goals and to know what successful performance of that goal looks like. They also need pedagogical content knowledge to appropriately select the best teaching strategies to meet students' needs. Similarly, a general sense of assessment knowledge is important for teachers to align assessment to instructional goals and select the best assessment mode to highlight student performance on those goals. Lastly, Heritage (2007) impresses that teachers need to know how to determine student's prior learning because it impacts both the overall instructional goal and the differentiated instruction needed to help students meet those goals.

Effective Professional Development

Yet, effective professional development for teachers is just as much a principled enterprise as effective instruction for students. Marzano (2003) believes that effective professional development is meaningful to the teacher without devaluing his or her ability. Too

often, professional development marginalizes the teacher because it relies on an expert to "fix" the teachers by presenting one specific formula for success (Butler, Lauscher, Jarvis-Selinger, & Beckingham, 2004). On the other hand, Marzano's (2003) research on effective professional development shows that it has the strongest relationship to change when it is applicable to a teacher's specific content, provides opportunities for active engagement and practice, and is ongoing and sustained. In addition, the National Staff Development Council (2011) identifies additional components that include teacher collaboration in learning communities, a data-driven focus and outcomes, and strong administrative leadership.

Professional development that occurs in learning communities is important because it provides a relevant setting to address a teacher's specific classroom needs and opportunities for the practical application of learned concepts. Applicability is essential because although teachers may be required to attend professional development, they aren't always given the time and support needed to use it (Butler et al., 2004; Lutrick & Szabo, 2012; Sousa, 2009). Ineffective professional development often takes a generalist approach and provides little follow-up or support to help teachers actually use what they have learned. Wiliam (2011) argues that "...teachers are bombarded with innovations, but none of these innovations have time to take root, so nothing really changes" (p. 29). Learning communities also provide opportunities to reflect with other teachers in similar stages of implementation in order to refine and internalize the change rather be frustrated with failed efforts in isolation (Lutrick & Szabo, 2012).

Data Sources

According to the 2012 LMS School Improvement Plan data, both reading and math proficiency scores rose at least twenty percentage points during this period of intense instructional reform (see Figure 1). Likewise, our overall performance composite grew consistently from 61.2% in 2008 to 83.4% in 2011. In addition, the 2009 and 2010 NC School Report Card Data shows that we made AYP in all eight subgroups and met 29 out of 29 indicators to come out of sanctions for the first time. Even though we did not make AYP in 2011, we only missed it by one indicator. However, since AYP

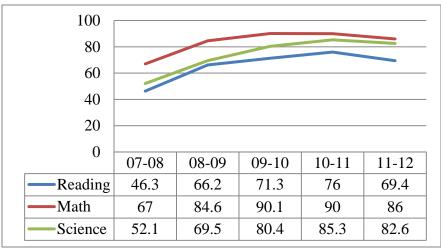


Figure 1. LMS EOG Proficiency Percentages from 2012 School Improvement Plan. This figure shows a period of rapid student achievement growth followed by last year's decline.

proficiency goals increase every year, we still actually exceeded our achievement goals from the year before (Principal, personal communication, February 28, 2013).

The NC Teacher Working Conditions Survey results for both 2010 and 2012 also support that school improvement efforts the last five year have had a positive impact on both teaching and learning. On the both the 2010 and 2012 surveys, over 90% of the staff felt that they worked effectively in professional communities to develop and align instruction, used assessment data to inform instruction and were provided supports to improve their instruction. Likewise, 90% or more teachers laud data driven professional development that is clearly aligned with school improvement goals on both the 2010 and 2012 surveys. Furthermore, 91% feel that their professional development has deepened their content knowledge, and 94% feel it enhanced their overall ability to improve student learning. Thus, both student achievement data trends and teacher perceptions of professional development show that previously enacted school improvement reforms focused specifically on student achievement were effective at that time. However, at the end of the 2011-2012 academic year, we had our first decline in scores in five years, and after three consecutive years of high growth, we only barely met expected. In addition, the 2012 NC School Report Card shows we only met 23 out of 25 performance targets and did not meet adequate yearly progress in even the white subgroup, a category that had never missed before. There was a general frustration among the staff with the lack of progress, especially since nothing had significantly changed in our school improvement "formula".

Still, 2011-2012 TeachScape classroom walkthrough data shows an instructional program focused heavily on teacher-directed instruction and traditional paper and pencil assessments that

may be overshadowing opportunities for more meaningful and differentiated instructional choices based on needs determined in the formative assessment process (see Figure 2). In fact, only 10% of the entire 378 walkthroughs logged in 2011 show clear evidence of differentiation at the time of the walk-through. While that doesn't mean that differentiation didn't

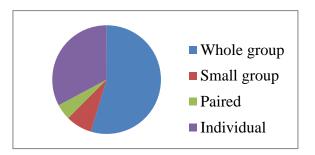


Figure 2. 2011-12 Grouping formats from TeachScape classroom walkthrough data. This figure shows that whole group instruction was consistently the predominant form of instruction in the 2011-2012 school year.

happen in a more subtle way not detectable in a three-minute walk-through, that same data shows that over 70% of walk-throughs displayed an emphasis on whole group, teacher-centered instruction. Similarly, the most common instructional strategies used was homework and practice activities while the most common student action was listening and writing. While whole group, listening, and writing centered instruction do not represent poor instructional choices in general, they do highlight a lack of diversity in both instructional delivery and strategies that would be evident if formative assessment was frequently being used to adapt instruction and improve the learning process.

Action Plan Process

With the state allocating little money for professional development in the last budget cycle, administrators and teacher leaders must take an active role in both developing and delivering professional development. Thus, to develop the action plan presented in Appendix A I would work with multiple stakeholders. First, I would work with administration and the school improvement team (SIT) to analyze classroom walkthrough data, student achievement data, and the NCTWCS in order to do a needs assessment of possible professional development needs. The needs assessment would occur in conjunction with summer school improvement plan meetings so that both the professional development plan and its instructional focus were data-driven and part of the larger school improvement focus.

In order to balance creating a consistent and shared message with the effectiveness of professional learning communities (PLCs), I would take a two-pronged approach to facilitating professional development. First, I would solicit a team of teacher leaders to help develop the professional development plan and deliver training at the grade level presentations. It is important I be involved as the administrator because as an instructional leader I want teachers to see that I am personally invested and knowledgeable about what I am asking teachers to do. Using teacher leaders is important because it empowers teachers by building their professional capacity, and it also increases buy-in from the rest of the staff when they see that it is not just a top-down approach. I would seek a representative from each grade level as well as the elective teachers and plan for one or two extra spots for any additional volunteers beyond the one from each level. In addition, the professional development plan would utilize teacher exit slip feedback from the whole group formative assessment sessions as well as PLCS feedback to make

on-going adjustments to the professional development plan (see Figure 1). This will increase the relevancy of the professional development but also models the spirit of formative assessment.

Action Plan Narrative

Once the training team is identified, they would operate as a PLC study group to research formative assessment, develop a professional development plan, and implement it. Since embedding professional development into the workday is more effective than after-school sessions (Lutrick & Szabo, 2012; Sousa, 2009), my action plan incorporates classroom release time for the training team to research formative assessment and prepare the professional development. Since the professional development directly impacts student achievement, I can use district-allocated remediation and school improvement funds to hire substitutes to give the training team classroom release time. Additional time can also come from having support staff periodically cover their homebase and advisory periods so they can collaborate. Since formative assessment is a 21st century initiative supported by the North Carolina Department of Public Instruction (NCDPI), the training team will use NCDPI's (2010) online NCFALCON formative assessment modules and Wiliam's (2011) book, *Embedded Formative Assessment*, to build upon their previous knowledge and experiences with formative assessment.

While both the book and the online NCFALCON module provide valuable pedagogical information and formative assessment instructional strategies, they alone do not provide teachers the opportunity to translate research into action. Thus, I would work with the training team to personalize the NCFALCON modules to the specific teaching and learning needs of our school as identified by SIT and balance whole group and PLC professional development formats into the delivery model. Again, since time is my biggest potential barrier, I would deliver most of the professional development during the school day and embed it into classroom practice as much as possible. Therefore, the modified delivery model includes grade level sessions led by

administration and that grade level's training team members, focuses on a brief overview of the applicable research, and models instructional strategies for each area of focus (see Appendix B). The strategies will be embedded in the actual presentation with the presenters using them to formatively assess the teacher participants. Time will also be provided for participants to reflect on how the strategies were used and how they might be able to use them in their own classrooms. This opportunity to reflect on how to transfer what they have learned makes it more likely that they will actively use the strategies in their own classrooms (Lutrick & Szabo, 2012; Marzano, 2003; Sousa, 2009). Each of the grade level presentations will focus on a specific aspect of formative assessment. Session one will examine the importance of formative assessment in general and how it is different than summative assessment. Embedded strategies will model the value of all-student response systems like exit slips and signal cards to formatively assess all students in the classroom rather than just the few who might respond to oral questions. This session will also focus on how to use on-the-fly formative assessment to increase student learning. Session two will help teachers develop powerful learning targets using "I can" statements and how to define and communicate criterion for success. Session three will explore the various ways to collect and document evidence of student learning. The focus on will be planned and embedded formative assessment strategies. Session four will help teachers use specific feedback to help students take ownership of their work and increase student learning. In particular, teachers will practice giving feedback on student writing assignments in response to new Common Core literacy standards in all subjects. In the final session we will share strategies for helping students take ownership of their learning and internalize criteria for success by engaging in peer and self-assessment. While a variety of strategies will shared, creating rubrics and using them with students will be an area of emphasis.

Each grade-level presentation will be followed with expectations for content area PLCs to plan, utilize, reflect, and adjust instruction using either the strategies presented that month or other strategies that PLC researches and still meet the spirit of that month's focus (see Appendix B). Using both the feedback gathered at the grade level presentations and direct input from the PLCs, the training team will set performance expectations, but PLCs will have flexibility to choose those strategies most suited to their content and learning objectives. Essential to the PLC expectations will be for teachers to not just embed formative assessment in their lesson plans but to also collaboratively analyze student work samples and use what they see to make adjustments to learning. The biggest potential barrier to the professional development will be teacher buy-in; however, an emphasis on practical application to the classroom with prioritized time for teachers to actually apply what they have learned in the classroom will help.

A final piece of the action plan will be to create a unit planning guide that emphasizes formative assessment as a powerful strategy for increasing student learning. Since it is important that the unit planning guide not just be viewed as unessential paperwork or an administrative "gotcha" tool, engaging teachers in the design process will be essential. Therefore, with the training team, I will develop an initial tool that will be then be offered to the PLC groups for feedback (see Appendix C). As the instructional leader, I will start the tool in order to ensure that it addresses essential components of our school vision but use teacher feedback to make sure the tool is useful and concise. The planning tool will include all major components of formative assessment such as clear learning targets, criteria for success, planned & embedded formative assessment strategies, a pre-planned summative assessment, and on-going unit reflections to document on-the-fly formative assessment and other adjustments to the unit during actual instruction. Again, the purpose of the planning tool will not be to burden teachers with additional paperwork but to help them consciously utilize formative assessment strategies and analyze student work for necessary changes to instruction.

Reflection

While many teachers at LMS may already be using formative assessment strategies effectively, it is not consistent or a prevalent part of the instructional paradigm as evidenced by a reliance on teacher-led instruction and targeted remediation that only benefits a portion of the student population. However, my formative assessment professional development plan not only provides an opportunity for teacher leaders to actively engage in change, but it will also positively impact student learning for all students by helping teachers adjust instruction midstream instead of waiting for a summative unit, benchmark, or end-of-grade test. The professional development plan's gradual approach and emphasis on implementation allows teachers time to both internalize and utilize formative assessment in the classroom so that it becomes embedded in their instructional practices. When the classroom walkthrough data is revisited the next year, it will be evident that the plan has been successful when the data reflects a variety of instructional strategies and student activities instead of a predominant reliance on teacher-led instruction. More variance in the data will reflect that teachers are using multiple approaches to student learning in effort to maximize student learning and adjusting instruction along the way based on formative assessment feedback. Likewise, PLCs will continue to analyze student work for its potential impact on future instruction and design lesson plans that not only engage and monitor all students but also involve students metacognitively in their own learning.

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Appendix A:

Leeds Middle Action Plan

School Improvement Goal: Improve student achievement for all students by utilizing formative assessment strategies to inform instruction

Objectives:

- By 2013, 100% of instructional staff will be trained in using formative assessment strategies to inform instruction.
- By 2014, overall proficiency scores in reading, math, and science will increase by at least 3% over 2012 results.

Action Step	Persons Responsible	Resources Required/Budget	Potential Barriers	Due Date
Identify team of teacher leaders to facilitate formative assessment professional development (will serve as training team)		NA		July 2012
Complete NC Falcon formative assessment module from NCDPI & read <i>Embedded</i> <i>Formative Assessment</i> with training team	Assistant Principal of Instruction Training Team	 10 Copies of <i>Embedded Formative</i> <i>Assessment</i> by Dylan Williams (approx. \$200 from general funds) Computer & Internet access for online completion of NCFalcon 		August 2012
Develop professional development modules & formative assessment PLC expectations	Training Team	 NC Falcon Professional Development module Presentation materials Substitutes for training team (6 subs x 5 days x \$100/day = \$3000) – Use district allocated remediation/school improvement funds to pay from subs 	• Release time to develop quality professional development	#1 & #2: August 2012 #3: October 2012 #4: November 2012 #5: February 2013
Deliver five sessions of whole group professional development on formative assessment • #1: Importance of Formative Assessment • #2: Learning targets and Criteria for	Instructional Coach Volunteer Teacher Leaders	 NC Falcon Formative Assessment Modules (modified) Smartboard or projector technology Chart paper, sticky notes, and 	• Faculty buy-in	#1: Sept.2012 #2: Oct. 2012 #3: Nov/Dec.

Success		markers		2012
• #3: Collecting and Documenting Evidence				#4: Jan/Feb. 2013
• #4: Providing Feedback				2013
• #5: Self & Peer Assessment				#5: March/ April. 2013
Use PLC teams to implement strategies, analyze student work, and reflect upon effectiveness of formative assessment strategies	PLC teams	• PLC	• Lack of adherence to PLC norms and procedures	
Create formative assessment unit planning guide in conjunction with SIT and the PLC teams	SIT Instructional Coach PLC teams		 Creating a meaningful document that the group can all accept Not creating 'unnecessary' paperwork for teachers 	March 2013
 Evidence of Success: Analysis of student work Student achievement scores on End-o Classroom Walkthrough Data Formative Assessment Unit Planning 				
• Formative Assessment Unit Planning Evaluation Process:	Guide			

- PLC minutes
- Professional development evaluations Professional development rosters ٠
- ٠
- Classroom Walk-throughs

Appendix B:

Formative Assessment Professional Development Plan

2012-2013

Date/Topic	Grade Level Presentations	PLC Content Area Group Follow-Up
September 2012: The Importance of Formative Assessment	 Formative Assessment Powerpoint (modified from NCFalcon) Fact/Fiction Game Formative vs. Summative Sort Reflection of on-the-fly classroom formative assessment moment (NCFalcon video) Teacher Self-Assessment of formative assessment practices Stoplight Exit Slip Green—Feel good about Yellow—Have questions about Red—Need to improve on 	 Choose one formative assessment instructional strategy from grade level presentation or a strategy of your own to implement in the classroom Reflect on classroom use and what you learned about student learning in the lesson
October 2012: Learning Targets and Criteria for Success	 Learning Targets & Criteria for Success Powerpoint Practice writing learning targets on gridded exit slip board (modeling exit slip accountability strategy) 	• Using Curriculum documents and district pacing guides, determine essential learning targets and criteria for success for 2 nd 9 weeks
November/ December 2012: Collecting and Documenting Evidence	 Collecting & Documenting Evidence Powerpoint View formative assessment video by Rick Wormelli (YouTube) Color coding of formative assessment strategies Green—Use often Yellow—Use occasionally Red—Never use 	 Using learning targets and criteria for success developed previously, collect formative student learning evidence weekly Reflect on classroom use and what you learned about student learning in the lesson adjustments for instructional impact
January/Februar y 2013: Providing Feedback	 Jigsaw activity for Seven Keys to Effective Feedback (<i>Educational Leadership</i>) Feedback Powerpoint Discuss Writing Feedback Handout & Two Stars and a Wish feedback strategy Model with actual student writing samples 	 Use effective feedback tips from grade level presentations to give feedback on a student writing assignment Reflect on classroom use and what you learned about student learning in the lesson Develop 3rd 9 weeks learning targets & criteria for success
March/April 2013: Self & Peer Assessment	 Peer & Self-Assessment Powerpoint Share examples of peer & self-assessment strategies Share sample rubrics—discuss advantages/disadvantages of holistic vs. analytical rubrics 	 Develop an instructional rubric for an upcoming learning target Implement rubric Reflect on classroom use and what you learned about student learning in the lesson Develop 4th 9 weeks learning targets & criteria for success

Appendix C:

Formative Assessment Unit Planning

Grade Level:	Department:					
Unit Topic:			Unit Timeline:			
Power Standards:						
Students will be able to:		Summative Unit Assessment Plan:				
Planned Embedded Form	ative Assessment:	Proficiency Ind	icators:	Exemplary Indicators:		
Potential Student Misconceptions:						
How they will be addressed:						
Mid-Unit Student Learnin	ng Reflections (include d	ate!)				