Summative Assessment Planning Template

Directions: Use the summative assessment planning template to walk through each step in the assessment design process. The steps are sequential, but it is possible to skip steps at key points (for example, a selected response assessment will not require a rubric while a constructed response assessment will never require multiple-choice items, and so on). The template offers if-then statements to help guide team decision making along the way. Because of the comprehensiveness of this design template, it works best with summative assessment designs.

Overview and Context of the Assessment

Curriculum unit and assessment name: Provide a statement that captures the essence of this assessment: What unit will it assess? What essential question will it address?

Timing and pacing: Where and when in the unit will this assessment take place?

Primary purpose for this assessment: Often, assessments have more than one feature, but what overall purpose does this assessment serve? What is it you are trying to ascertain if students have achieved mastery? The descriptors in the following table provide clarity for each level. Check only one of the following.

☐	**Possession:** Students demonstrate ownership of declarative and procedural knowledge. They use basic retrieval and understanding.
☐	**Execution:** Students use acquired knowledge and skills to solve problems; make informed, strategic decisions; and respond to the demands of daily challenges.
☐	**Integration:** Students extend and refine knowledge to automatically and routinely analyze and solve problems and employ solutions. Students must blend knowledge and skills with other disciplines in order to be successful.
☐	**Construction:** Students use extensive knowledge and skills in dynamic ways to construct new solutions to current complex problems, to solve unanticipated problems, and to take action. Their efforts inform teachers' understanding of the necessary knowledge and skills.

Specific Content for the Assessment

Standards being assessed: See state standards, unit objectives, or both. Note that the fewer standards and objectives, the more focused the instrument and resulting data.

Standard Name and Number	Description of the Standard

Targets being assessed: Targets may be explicit or implicit in the standards. Here, unpacking or deconstructing standards comes into practice. When identifying the targets, consider the following.

- Targets must tie to the standards of the assessment.
- The assessment doesn't require a specific quantity of targets.
- Some kinds of targets may not be represented in a particular assessment.

There are two kinds of targets to consider: (1) specific learning targets and (2) strategic learning targets.

1. **Specific learning targets:** These targets are context dependent. They provide the content (facts, details, general understandings, and so on) that students must know, or they outline the details of a process or algorithm that students must do. Specific learning targets are most often measured by right or wrong answers.
2. **Strategic learning targets:** These targets are generalizable. They do not depend on a specific context, specific curriculum, or isolated details because they have a skills or process orientation. As such, teachers can assess strategic learning targets in multiple media over time. Strategic learning targets require quality criteria, scales, or rubrics to score student responses for accuracy because students could answer in many plausible ways.

Record the specific and strategic learning targets that this assessment will address.

Specific (Content) Targets	Strategic (Skill or Process) Targets

Quality of Targets

Select a level of quality (*no evidence*, *developing*, or *proficient*) for each statement. Use the indicators of quality for learning targets listed in the far-left column to determine if the learning targets listed on the assessment meet the criteria. Check the appropriate box to the right for each statement.

Indicators of Quality for Learning Targets	No Evidence	Developing	Proficient
Targets **align** with required or appropriate standards for the course.	☐	☐	☐
The identified types of targets reflect the **core processes** of the standards (maintain the essence of the standards' content and processes).	☐	☐	☐
Targets are **sufficient and accurate** in reflecting all the course objectives and expectations.	☐	☐	☐
Targets have **endurance** (will be lifelong, required learning).	☐	☐	☐
Targets have **leverage** (will be required to support other learning in life).	☐	☐	☐
Targets are **scaffolded** (build on each other).	☐	☐	☐
Targets are written in **student-friendly** language (framed as *I will*, *I can*, or *Students will be able to* statements that students understand).	☐	☐	☐

Rigor of targets: Rigor (a balance of conceptual understanding, procedural fluency, and application) ties to the entirety of the task, not the discrete parts. Rigor has four levels.

1. **Recall:** Recall a fact, information, or procedure.
2. **Skill or concept application:** Use information or conceptual knowledge, two or more steps, and so on.
3. **Strategic thinking:** Develop a plan or sequence of steps with some complexity and more than one possible answer.
4. **Extended thinking:** Investigate and take time to think and process multiple conditions of the problem.

In the boxes below, identify the total number of items on the assessment that are aligned to each DOK level. Once column one is completed, identify the percentage of assessment items at each DOK level.

Total Number of Targets per Category on Assessment	DOK and Mental Processing	Percentage of Total Targets Represented on Assessment
	Level 1: Recall	
	Level 2: Skill or Concept Application	
	Level 3: Strategic Thinking	
	Level 4: Extended Thinking	

Assessment method: Check one of the following, and follow the directions that correspond to the chosen assessment method.

☐ Selected-response assessment

☐ Constructed-response assessment

Selected-response assessment: If the planned assessment will be a selected-response assessment, then map the assessment plan using the following chart. Record targets in the following specification chart, and total the number of items it includes for each target. Alter the chart to add or remove rows or columns as necessary.

If the assessment will be a constructed response assessment, then skip this section.

	Strategic Target	Strategic Target	Strategic Target	Total
Specific Targets (Content Dependent)				
Specific Targets (Content Dependent)				
Specific Targets (Content Dependent)				
Total				

Record what types of items will appear on the selected-response assessment and how many of each type you anticipate the assessment will include.

Type	✓	Anticipated Number of Items
Fill in the blank	☐	
Matching	☐	
Short answer	☐	
True or false	☐	
Multiple choice	☐	
Diagram or chart to label	☐	
Other	☐	

Constructed-response assessment: First, identify if the constructed response will be an essay assessment or a performance assessment. Then, describe the prompt or the tasks that the assessment requires.

If the assessment will be a constructed-response assessment, then determine the proficiency levels and criteria the essay or performance assessment will have. Develop a rubric by taking the following six steps.

1. Determine your proficiency levels in the top row of the following chart (such as *advanced*, *proficient*, *emerging*, and *basic*, or *4*, *3*, *2*, and *1*). Decide if the highest score is expected for all or above and beyond.
2. Identify your criteria in the first column (such as conventions, claim, support, and comprehension).

3. Start with the first criterion, and describe the level of acceptable proficiency (often level 3). What does level 3 look like?
4. Define the criterion's low end. What does level 1 look like? (Frame it in positive language; avoid using *not*.)
5. Fill in level 2 and then level 4 for each criterion.
6. Move to the next criterion, and use the same process.

Extend or abbreviate the provided chart as needed.

Criteria				

Effective Use of the Assessment

As a team, consider the following questions to preplan responses to assessment results regarding teacher learning, student learning and involvement, and interventions.

Teacher Learning

- How will we gather and organize the data for shared learning and a collective and systematic response?
- How will we score the data?
  - External scoring (outside input)
  - Independent scoring
  - Collaborative scoring (recommended for common assessments, with use of the following protocols)
- What protocols might we use to make sure we score alike? (Consider using the reproducible "Protocols for Examining Evidence and Artifacts" on pages 173–177.)
- How will we manage the data once we have scored them for comparative analysis?
- What will be our indicators of student learning? What cut criteria will we have for each target area? What evidence might we seek in students' answers to know they have truly learned?

List your plans for managing data in the following space.

Student Learning and Involvement

- How will we use the results to monitor and promote student learning?
- What strategies will we use to help students identify their strengths, areas of challenge, and next steps based on the assessment?
  - Opportunities and tools for self-assessment
  - Opportunities and tools to set learning goals
  - Opportunities and tools to create plans to address weak areas on the assessment
  - Opportunities and tools for recording and tracking personal progress on achievement targets
  - Opportunities to talk about their growth
  - Opportunities and tools to plan next steps
- How will we offer data to the learners? How will we offer students feedback on their assessments?

Interventions

- What strategies will we use to help students who did not master the content as required?
- What instructional interventions might we consider as we supply extra time and support to address those targets that students have not mastered?
  - Opportunities for reteaching
  - Opportunities for flexible grouping
  - Resources for continued learning
- How will we reassess to know the interventions worked? (Reassessments should be tied to missed targets and employ different questions regarding those targets.)