

**Draft Report to the Oregon Board of Education
and
Interim Legislative Committee on Education
HB 2680 Work Group Report and Findings**

Background

Oregon, like many other states around the country, has been doing statewide summative assessments of students and reporting on the information to schools and the public for decades. During the 2014-15 school year, the Oregon Department of Education switched the test it was using to a new assessment, Smarter Balanced, developed by a multi-state consortium of experts in the field of educational assessments. During that same year, the legislature passed HB 2680 which stated as follows:

Section 1. (1) The results of a statewide summative assessment developed by a multi-state consortium and administered during the 2014-15 school year may not be used to establish summative ratings of schools or to make summative evaluations of teachers or administrators.

(2) The Superintendent of Public Instruction shall convene a work group to determine how to implement the results of a statewide summative assessment developed by a multi-state consortium. The work group shall:

(a) Review the results of the assessment administered during the 2014-15 school year

and:

(A) Evaluate whether the assessment accurately measures student learning;

(B) Analyze student learning gaps; and

(C) Identify adjustments in instruction necessary to address student learning gaps.

(b) Issue findings and make recommendations for legislation in a report submitted to the State Board of Education and to the interim committees of the Legislative Assembly related to education....

As instructed, the Superintendent of Public Instruction identified a work group of interested and expert individuals and provided the work group with information, reports and additional study to answer the questions posed by legislators. In addition, an impartial, professional facilitator was brought in to help the work group discuss and draw conclusions. The facilitator also provided summaries of work group sessions 2-4 (see attachment A).

This report is the summary of that entire effort, drafted by the facilitator with input and approval of the Work Group.

Work Group Process

To achieve its task, ODE convened a group of interested and expert individuals, many of whom are associated with the following groups and organizations:

- Classroom teachers
- Instructional coaches
- School and district administrators
- Higher education administrators
- Oregon School Board Association
- Oregon Education Association
- Oregon Parent Teacher Association
- Stand for Children
- Oregon Legislature

The group, agreed on the following rules of engagement and adhered to them for the course of their work together:

- We will be fully present and engage in active listening
- We will be respectful of one another's views
- We will suspend external "noise" and agendas during the meeting
- We will limit email and texting during the meeting

The Work Group met four times: January 15th, March 18th, June 10th and June 27th to learn about, discuss, and then make recommendations about:

- The background and design of summative assessments;
- Oregon's involvement with the Smarter Balanced assessment's multi-state consortium;
- How the assessment was designed to 'match to standards' created at the Federal level, known as the Common Core;
- How the assessment was administered to students, including how accessibility features were available to be used for students with disabilities, English Learners, and students with other individualized needs to meaningfully access and engage with the summative tests (this component was referred to as "match to students");
- How the summative assessments could be improved via an improvement system which includes educators in the discussion and change process;
- How the assessment results were used by educators at the school district level to enhance their processes;
- What the 2014-15 statewide summative assessment results "say" about student learning gaps; and

With the assistance of Education Northwest, what a specific panel of principals and teachers had to say about the local conditions present in their schools with regards to instruction, leadership, assessment, professional learning, collaboration, and school conditions for learning that contributed to their students' successful performance on the 2014-15 summative assessments.

Recap of House Bill HB 2680 Charge and Process

As noted above, the work group was comprised of a variety of stakeholders representing Oregon's education system and a wide blend of perspectives. Below is the work group's charge and a summary of what work group members achieved at each meeting related to that charge:

Charge 1: Evaluate whether the assessment accurately measures student learning:

At Meeting 1, the work group discussed the alignment between the summative assessments, the adopted standards and the Common Core, including how the assessments cover the depth and breadth of the Common Core ("match to standards").

At Meeting 2, the work group learned about and discussed what features or qualities of the summative assessments have been employed to maximize accuracy of results for all students ("match to students").

Charge 2: Analyze student learning gaps:

At Meeting 2, the work group discussed "student learning gaps" and defined these as both gaps in learning for groups of students, as well as achievement gaps between student groups.

At Meeting 3, the group explored how the summative assessment could be used to:

- evaluate both types of learning gaps;
- evaluate the statewide 2014-2015 assessment results in regards to learning gaps between student groups; and
- discussed the results of the descriptive study to see what it told the group about how schools look at gaps in learning for groups of students.

Charge 3: Identify adjustments in instruction necessary to address student learning gaps.

- At Meeting 3 the Work Group reviewed results of a descriptive study and discussed what it told them about how schools use summative assessment data to identify adjustments in instruction to address student learning gaps.
- At Meeting 4, the work group continued to reflect on the information presented at Meetings 1, 2, and 3 to explore the extent to which summative assessment data can and should be used to identify adjustments in instruction to address student learning gaps.

In preparation for meetings and at meetings, the Work Group reviewed the following documents and reports as evidence to support their discussions and responses. The actual documents are [will be] attached in Appendix B-Z for review by interested members of the Board, Legislature and public.

LIST HERE—which of the many handouts does the work group feel should be listed to show the breadth of the materials reviewed by the work group? All? See attached list.

Recommendations/Responses to Questions from 78th Legislative Assembly

1. Does the assessment accurately measure student learning?

For starters, the Work Group found it difficult to make any definite determinations after only one year of the assessment. The newness of the test and how it is administered will require a few years to feel confident enough to make a solid judgment on this point. For example, because the assessment is administered on computers, many felt that some students, especially younger students, need time to learn HOW to take the test before making a determination about the accuracy of what is measured.

- The group agreed that a determination of this sort could be made after X years and would require....

With that caveat, the Work Group did believe that the assessment appears to measure whether students do or do not have knowledge about the standards that are tested. When classroom instruction is aligned specifically to the standards, then the assessment appears to be an accurate measure of knowledge related to those standards. However, because not all classroom instruction is geared specifically to the standards, the work group felt the summative assessment does not appear to accurately measure all of student learning.

- The group believes the assessment has the potential to accurately measure student proficiency in the areas tested.

2. Are there gaps in student learning?

At meeting 2, the work group defined gaps in student learning as:

- 1) gaps in learning for groups of students and
- 2) achievement gaps between student groups.

The group believed that the statewide summative assessment provides the opportunity to identify and analyze proficiency gaps for groups of students. The summative assessment also has the potential to help identify system, program and resource shifts needed to address gaps for these groups. However, it does not provide enough information to make specific judgments about ‘gaps in student learning’ with enough certainty at this time. For future exploration, outside of the scope of HB 2680, the work group felt that a review of the gap in standards implementation would be an important next step.

QUESTION: Is there something the group would like to say, more specifically, about the appropriate ROLE of the statewide summative assessments in identifying achievement gaps vs. gaps in learning? Can you identify whether, by design/nature of the summative assessments, additional tools are needed as companions to the summative assessments to provide a fuller, more locally contextualized picture of both types of student learning gaps?

3. If there are identified gaps in student learning, what adjustments in instruction are needed?

The Work Group is unable to answer this question at this time because they believe the summative assessment, in and of itself, is insufficient for making judgements that would support adjustments to instruction. The Smarter Balanced summative assessments evaluate a target. At the group level, the aggregate data gives an idea of how the group is performing towards that target, but they do not provide a picture of the individual student and his/her understanding.

The Smarter Balanced summative test was designed to be a part of a system of assessments. However, Oregon does not have the full system at this point. Some districts have implemented a more complete assessment system and have filled gaps they have identified in their aggregated information. However, there is not consistency across the state. In addition, the Smarter Balanced assessment was built by assessment experts who sought to cover the Common Core state standards. Content coverage dominated the thinking during development and may not necessarily correlate to specific adjustments in instruction.

Still, the Work Group heard compelling evidence to suggest that the results of the statewide summative assessment, when used as a tool for collaborative learning within a particular school/school district, can be very valuable as a forensic tool to help make adjustments to overall instructional strategies. The aggregated information provided by Smarter Balanced results appears as though it will have useful information for use at the class, school, and district level when it is accompanied with specific opportunities for teachers and administrators to take the time necessary to collaboratively analyze the results they are seeing and then make appropriate, agreed upon strategy changes from that information.

The statewide summative assessment, by its design, evaluates a grainsized amount of material at the student level compared to the aggregate level. Additionally, the timing of the statewide summative assessment occurs *after* instruction. Considering these two points, the work group was unable to draw any conclusions about adjustments in teaching at this time.

In addition, given that the summative assessment is looking at gaps in learning across student groups, the Work Group believes that adjustments should be made at the system level, not at the individual level of instruction. The work group believes that the State should implement a balanced assessment system with formative assessments used to support learning while the student is involved in instruction; interim assessments to periodically determine how groups of students are progressing; and summative assessments to determine knowledge and skills acquired by groups of students over time. See below for recommendations that the work group believes could help to answer this question.

Comment [D1]: Comments reported in the 6/10 summary that might be useful for fleshing this statement out further:

- We need common understanding and definition for the criteria and purposes for the three types of assessments, rather than assuming that everyone uses the same criteria. The criteria, purposes, and user groups for each assessment need to be clear. We also need progress monitors.
- How do we define 'group' at the project and state-wide level? Who does this definition serve?
- Forensic work needs to be done with the data to get at why the gaps exist.
- We need to make sure that this is a learning process around the test by encouraging interaction with the class and collaboration.
- This needs to be a balanced assessment system with formative tools and internal diagnostics.
- The Smarter Balanced package is more than just the test. Right now we are taking a macro look at the test, however, as other tools are implemented, more information will be available in terms of achievement standards. It could be helpful to use the entire Smarter Balanced package at a micro level to inform what to do.

Conclusions/Findings of Work Group

At its third meeting, the work group coalesced around the idea that, while the statewide summative assessment provides useful information, it is only one piece of the puzzle needed for analyzing student learning, performance and the relationship to instruction. It was noted that ‘assessment’ is often divided into three categories and each category plays a vital role for making overall judgments about how well students, teachers and the system are doing. These categories include:

- **Formative assessment** - Formative assessments are generally carried out throughout a course or project and are used to aid a student’s learning. Formative assessment might be a teacher (or peer) or the learner, providing feedback on a student's work and would not necessarily be used for grading purposes. Formative assessments can take the form of diagnostic, standardized tests, quizzes, oral question, or draft work.
- **Interim Assessment** - Interim assessments are used periodically to determine how groups of students are progressing on particular subjects. Interim assessments are carried out concurrently with instructions and aim to see if students understand the instruction before doing a summative assessment.
- **Summative assessment** - Summative assessment is generally carried out at the end of a course or project. In an educational setting, summative assessments are evaluative and typically used to assign students a course grade. Summative assessments are designed to summarize what students have learned and to determine how well they understand the subject. Statewide summative assessments help determine how well schools are doing on a broader systemic level.

Comment [DS2]: What more does the Work Group wish to say about these categories? Are there better definitions that could be used? Criteria?

As a result of the Work Group’s review of the evidence, the group (or most of the group?) agrees/feels strongly/supports...(?) that good assessment work must be done using more than a single summative assessment tool. They agreed that Oregon needs a balanced assessment system that includes not only the statewide summative assessment, but also formative practices and interim assessments.

The Work Group remarked that the full Smarter Balanced package is more than just the summative assessment: right now the Work Group, on behalf of the State, is taking a statewide look at the summative assessment. However, as other tools from the package are implemented, more information would be available in terms of achievement standards.

The work group believes it would be necessary to use the entire Smarter Balanced package to answer the breadth of questions posed by the Legislature regarding changes at the classroom and student level. Only with these additional tools can reliable judgments be made that will help to inform needed adjustments in instruction.

Recommendations to the Legislature

In light of the information above, the Work Group recommends:

- 1)
- 2)
- 3)
- 4)

HB 2680 [Possible] Appendix List (Evidence Reviewed by Work Group)

January 15th Meeting

Pre-reading Materials

- Exhibit 1a.... HB 2680 Case Study Proposal
- Exhibit 1b.... Enrolled House Bill 2680
- Exhibit 1c.... The Right Trajectory – State Teachers of the Year Compare Former and New State Assessments (NNSTOY 2015)
- Exhibit 1d.... End of Grant Report – June 2015

Handouts: Materials

- Exhibit 2a.... Accurate Measurement Matrix
- Exhibit 2b.... Match to CCSS Matrix
- Exhibit 2c.... Match to Student Matrix
- Exhibit 2d.... HB 2680 Work Group: Key Terms

Handouts: Math Participant Handouts

- Exhibit 3a.... Coherence Activity Map
- Exhibit 3b.... Grade 3 Mathematics Item Specification C1 TA
- Exhibit 3c.... Oregon Common Core State Standards for Mathematics – Grade 4
- Exhibit 3d.... Progress to Algebra in Grades K-8 (Publishers Criteria)
- Exhibit 3e.... Mathematics Summative Assessment Blueprint (as of 02/09/2015)
- Exhibit 3f.... Mathematics Claim #1 – Concepts and Procedures

Handouts: ELA Participant Handouts

- Exhibit 4a.... Oregon Common Core State Standards for English Language Arts – Grade 8
- Exhibit 4b.... ELA/Literacy Summative Assessment Blueprint (as of 2/9/2015)
- Exhibit 4c.... Smarter Balanced Assessment Consortium: English/Language Arts Practice Test Scoring Guide – Grade 8 Performance Task
- Exhibit 4d.... English Language Arts Specification: Grade 4 Claim 1 Target 11

Presentations

- Exhibit 5a.... Exploring the Evidence of Mathematics – Mark Freed, Math Education Specialist
- Exhibit 5b.... Exploring the Evidence for ELA- Ken Hermens, ELA Assessment Specialist
- Exhibit 5c.... HB 2680 Work Group – History & Context
- Exhibit 5d.... Introduction to the Technical Evidence – Ken Hermens, ELA Assessment Specialist, Mark Freed – Math Education Specialist

March 18th Meeting

Pre-reading Materials: Exploratory Case Study

- Exhibit 6a.... Teachers matter. Yes. Schools matter. Yes. Districts matter – really? (Chenoweth 2015)
- Exhibit 6b.... The Atlantic – the Long Beach Miracle, how the working-class California city saved its schools (The Atlantic, February 2016)
- Exhibit 6c.... Odds-Beating Schools in the Common Core Era (Wilcox 2015)

Pre-reading Materials: Match to Standards

- Exhibit 6d.... Evaluating the Content and Quality of Next Generation Assessments (Fordham 2016)
- Exhibit 6e.... Evaluating the Content and Quality of Next Generation High School Assessments (HumPRO 2016)
- Exhibit 6f.... Rater Requirements: Measurement Incorporated
- Exhibit 6g.... Smarter Balanced Hand-Scoring Rules
- Exhibit 6h.... ELA Summative Assessment Design: Prioritization

Pre-reading Materials: Match to Students

- Exhibit 6i.... Better Tests, Fewer Barriers (Center for American Progress 2016)
- Exhibit 6j.... Smarter Balanced Elementary NAEP Study
- Exhibit 6k.... Technology Skills Embedded in the Common Core Standards
- Exhibit 6l.... ADA Requirements: Testing Accommodations

Handouts

- Exhibit 7a.... Descriptive Examples of Six “Beating the Odds” Schools in Oregon – An Exploratory Study (Gutierrez 2014, ODE 2013)
- Exhibit 7b.... Continuous Improvement Plan: Examining the Data: Making Course Corrections (Bloomquist, 2016)
- Exhibit 7c.... Data Review Summary Reference Sheet
- Exhibit 7d.... Quality Criteria Checklist: Bias and Sensitivity – ELA
- Exhibit 7e.... Framework
- Exhibit 7f.... HB 2680 Teacher Survey
- Exhibit 7g.... Mathematics Quality Criteria: Bias and Sensitivity
- Exhibit 7h.... UAA Framework and Categories

Presentations

- Exhibit 8a.... HB 2680 Work Group March 18 Introductory Slides
- Exhibit 8b.... Oregon's Assessment Accessibility Supports
- Exhibit 8c.... Item Match to Student
- Exhibit 8d.... Math Priority and Supporting Content
- Exhibit 8e.... Descriptive Study of Beating the Odds Schools

June 10th Meeting**Pre-reading Materials**

- Exhibit 9a.... Descriptive Study Survey Questions
- Exhibit 9b.... Oregon Department of Education HB 2680 Administrator Interview/Teacher Focus Group Protocol

Handouts

- Exhibit 10a.... HB 2680 Work Group Meeting Summary – March 18, 2016
- Exhibit 10b.... Using Consensus

Presentations

- Exhibit 11a.... HB 2680 Work Group June 10 Introductory Slides

June 27th Meeting**Pre-Reading Materials**

- Exhibit 12a.... HB 2680 Work Group Meeting Summary – June 10th, 2016
- Exhibit 12b.... Draft HB 2680 Work Group Report v1 (from Facilitator)

Handouts

- TBD