



Online Assessment Planning Tool PLANNING AND LEADERSHIP WORKSHEET

This worksheet is one of a set of resources addressing eight key elements of online assessment readiness. The worksheets are designed to assist districts and schools in planning actions steps that will move them from their current stage of readiness to their next targeted level of preparation and practice.

- Planning and Leadership
- Communications
- Assessment Practices
- Instructional Practices
- Professional Development
- Technology Infrastructure
- Systems Integration
- Logistics

		Assessment	Adaptation	Transformation	Action Plan			
		Just Starting	Building Awareness	Starting Improvements	Beginning to Translate Practice	Increasing		
		Strategies for moving from Awareness toward Adaptation		Strategies for moving from Adaptation toward Transformation		What	Who	When
PEOPLE	Check							
	Focus Areas							
TECHNOLOGY	Systems Mapping (Identifying details of multiple systems in order to convey complexity and efficiency)	Engage a cross-functional team to review the school systems inventory (see below), discuss common issues, and identify ways to improve efficiency and usability.	Conduct an annual inventory of technology-based assessment, instruction, and data systems in use, including data inputs and outputs, reporting systems, network utilization, technical requirements, procurement history, and who has access and decision-making authority.	Maintain data on systems usage and common issues (e.g., conflicts, duplications, confusion, data migration problems), and use the findings to inform integrated planning for technology, data management, and assessment/instructional products.	Maintain an ongoing system map for technology-based assessment, instruction, and data systems that is regularly updated to reflect any changes. Include data inputs and outputs, reporting systems, network utilization, technical requirements, procurement history, and who has access and decision-making authority, as well as data formats and transfer paths, interoperability standards in use, and how systems connect to each other. Understand interdependencies, gaps, duplications, and conflicts.			
	Cross-System Solutions (Identifying integration and access solutions)	Identify solutions for common systems integration issues, including services and processes, for better cross-platform management of login credentials, student rosters, student data, shared instructional content, and other information. Utilize restricted program and content access through district hubs.	Identify solutions for common systems integration issues, including services and processes, for better cross-platform management of login credentials, student rosters, student data, shared instructional content, and other information. Utilize restricted program and content access through district hubs.	Implement a range of solutions to streamline login, consolidate content access, and enable data exchange between multiple systems, with the goal of enabling a seamless user experience when switching between assessment, reporting, and instructional platforms and improving analytics across digital tools.				
	Interoperability (Building systems for more effective integration and cross-platform data exchange)	Understand what interoperability standards are available for different kinds of instructional and assessment content and data, such as CEDS, IMS Global (QTI, AEP, LTI, OneFactor, Caliper), Ed-Fi, and others. Understand the implications of these standards to different systems within the school.	Understand what interoperability standards are available for different kinds of instructional and assessment content and data, such as CEDS, IMS Global (QTI, AEP, LTI, OneFactor, Caliper), Ed-Fi, and others. Understand the implications of these standards to different systems within the school.	Establish the technical information that potential vendors must produce during the procurement process and what technical requirements their solutions must meet. Base this list on instruction and assessment needs, technology levels, and other functions. Insist that vendors utilize open standards (rather than vendor proprietary formats) for data exchange and systems interoperability such as CEDS, IMS Global (QTI, AEP, LTI, OneFactor, Caliper, Ed-Fi), and others.	Establish the technical information that potential vendors must produce during the procurement process and what technical requirements their solutions must meet. Base this list on instruction and assessment needs, technology levels, and other functions. Insist that vendors utilize open standards (rather than vendor proprietary formats) for data exchange and systems interoperability such as CEDS, IMS Global (QTI, AEP, LTI, OneFactor, Caliper, Ed-Fi), and others.			
PROCESS & PROCEDURE	Coordinated Requirements for Procurement (Establishing a set of technical and functional requirements for future procurements that captures interdependent and conflicting needs of the different platforms that have to serve instructional, assessment, and administrative purposes)	Understand how potential products will handle data inputs and outputs, what is self-contained and what is reusable, what formats are being used, what content and which data formats are proprietary, and how the products might work in concert with the products and systems already in use in the district and the schools.	Understand how potential products will handle data inputs and outputs, what is self-contained and what is reusable, what formats are being used, what content and which data formats are proprietary, and how the products might work in concert with the products and systems already in use in the district and the schools.	Establish the technical information that potential vendors must produce during the procurement process and what technical requirements their solutions must meet. Base this list on instruction and assessment needs, technology levels, and other functions. Insist that vendors utilize open standards (rather than vendor proprietary formats) for data exchange and systems interoperability such as CEDS, IMS Global (QTI, AEP, LTI, OneFactor, Caliper, Ed-Fi), and others.	Establish the technical information that potential vendors must produce during the procurement process and what technical requirements their solutions must meet. Base this list on instruction and assessment needs, technology levels, and other functions. Insist that vendors utilize open standards (rather than vendor proprietary formats) for data exchange and systems interoperability such as CEDS, IMS Global (QTI, AEP, LTI, OneFactor, Caliper, Ed-Fi), and others.			
	Enterprise Maintenance (Seeking efficiencies in coordinated maintenance programs for multiple technical systems)	Protect expensive digital investments with quality maintenance and support programs.	Protect expensive digital investments with quality maintenance and support programs.	Where possible, coordinate maintenance and support contracts to include multiple platforms as a means to promote more effective systems uptime (CET).	Where possible, coordinate maintenance and support contracts to include multiple platforms as a means to promote more effective systems uptime (CET).			

How to Use Online Assessment Planning Tool Worksheets

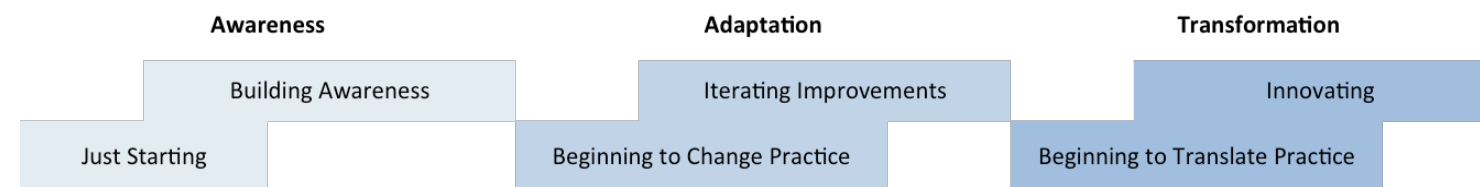
Each worksheet features Focus Areas with recommended strategies for moving a district and its schools along the spectrum toward greater degrees of online assessment readiness. Using the results from the Online Assessment Planning Survey, a district's planning team can identify their current stage along the spectrum for each element and where they would like to be in the future. The planning team can identify and prioritize critical areas on which to focus efforts by placing a check in the columns on the left side of the worksheet. The area on the right side of the worksheet should be used to identify action steps that will help achieve both short and longer-term goals. Each worksheet groups strategies into practical categories, including People (professional development, planning, engagement), Technology (systems, devices, infrastructure, software), and Process (policies, protocols, workflows, scheduling) to assist schools and districts in integrating assessment strategies with broader planning efforts.

This PDF is designed to be printed onto 11" x 17" paper.

Additional Online Assessment Planning Resources are available at <http://www.elearninstitute.org/assessment>.



Online Assessment Planning Tool
WORKSHEET



Planning and Leadership

Focus Areas		Strategies for moving from Awareness toward Adaptation	Strategies for moving from Adaptation toward Transformation
PEOPLE	Check		
	Cross-Functional Planning Team (Including, for example: staff from assessment, instruction, technology, special education)	Establish a dedicated cross-functional eAssessment team.	Establish a fully cross-functional team with an explicit charter and authority for decision-making.
	Online Assessment Plan and Roadmap (Creating a clear set of goals, and objectives for reaching those goals)	Develop an online assessment plan with clear purpose, goals, and timelines.	Integrate online assessment plans with other school plans.
	Stakeholder Input (Maintaining an open dialogue with administrators, teachers, students, and parents)	Share plans and schedules with key stakeholders and integrate their feedback.	Use a variety of channels to share plans and schedules with stakeholders across the school community and provide opportunities for their feedback.
	Quick-Response Team (Establishing a team that can react to issues that arise during active test administrations)	Create cross-functional quick-response teams for active assessment administrations.	Plan and rehearse with cross-functional quick-response teams.
TECHNOLOGY	Technical Requirements Planning (Developing a list of device and network requirements that can be updated as needed, as well as plans for closing technology gaps)	Know where to direct staff to find minimum technology requirements for different formative and summative assessment products and platforms.	Assemble information about minimum technology requirements across assessment and instructional platforms and customize for the campus.
	Capacity Planning (Knowing your school's online assessment capacity across interdependent assets and resources)	Use vendor and/or district provided information and tools to plan schedules that consider staff, facilities, and technology capacities for online assessment delivery.	Create a custom school Capacity Plan that can be used to model different numbers of devices, different schedules, and different room configurations.
	Data Systems Planning (Defining how your school will use digital tools to capture, collect, share, and visualize digital data)	Determine how your school will use vendor and/or district provided information and tools to collect and evaluate relevant assessment results and implementation data.	Customize tools to the specific needs of your campus that integrate data collection from multiple sources, make data more accessible for instructional and administrative decision-making, and support timely action and implementation tracking.
POLICIES & PROCEDURES	Online Assessment Selection Policy (Ensuring clear expectations for how teachers choose and comply with assessments and their modes of administration)	Establish a campus policy regarding teacher options for selecting online assessments.	Ensure campus online assessment policies align with State level requirements.
	Assessment Schedule (Establishing and communicating a single authoritative schedule of assessment windows and related deadlines)	Create and communicate the schedule of online assessments to campus stakeholders.	Create and communicate an integrated schedule that includes traditional and online assessments, practice tests, planning deadlines, and other milestones.
	Data-Driven Decision-Making (Defining a culture in your school for data planning, collection, and analysis to inform decision-making)	Develop systems to capture eAssessment data and evaluate progress against defined success metrics.	Regularly review, analyze, and discuss eAssessment data and evaluate progress against defined success metrics.
	Privacy Policy (Knowing applicable student and teacher privacy policies and requirements for compliance)	Know where to direct staff to find the privacy policies for the District and for different formative and summative assessment products and platforms.	Assemble information about privacy policies across assessment and instructional platforms, integrate with District policies, and customize as a single policy. Clearly communicate this information to administrators, teachers, students, and parents.

Action Plan		
What	Who	When
What	Who	When
What	Who	When