Executive Summary
Smarter Balanced is on track to deliver a fully functional assessment system by the 2014-15 school year. Working with our 27 member states and partners, we have established assessment claims and content specifications for English language arts/literacy and mathematics, have created an information technology architecture, are developing a common accessibility and accommodations policy, and are developing the first set of assessment items and performance tasks aligned with the Common Core State Standards. Fifteen of the 21 anticipated contracts to conduct the work of Smarter Balanced are in progress.

Highlights from the Consortium’s work this quarter include significant progress on the development of assessment items and tasks for the Pilot Test, data collection to support state technology readiness, approval of the Formative Assessment Work Plan, and a growing organization to support member states and stakeholder outreach.

**Pilot Test:** Hundreds of teachers have been recruited to participate in item and task development in support of the spring 2013 Pilot Test. During the summer and fall, these teachers will be trained to write and review 10,000 items and performance tasks. In addition, students will be selected to participate in cognitive labs that will study how they approach and interact with different types of computer-administered items. Item specifications and online item writing training materials to support this development effort are now available on the public website: [www.smarterbalanced.org/smarter-balanced-assessments/item-writing-and-review/](http://www.smarterbalanced.org/smarter-balanced-assessments/item-writing-and-review/).

**Technology Readiness:** States submitted the first round of baseline data through the Technology Readiness Tool. These data are currently being distilled into a report that will help Governing States determine the minimum technology specifications for the Consortium. These minimum specifications, along with the existing new hardware guidelines, will be used by district and state policymakers to determine their gaps in technology and to prioritize their readiness strategies.

**Formative Assessment Work Plan:** Governing States approved the Formative Assessment Master Work Plan. Key activities in the Master Work Plan include the creation of a digital library of curricular resources, providing assessment literacy training, and development of instructional modules. Efforts have begun to procure a contractor(s) to support this exciting work which is scheduled to begin in December 2012.

**Organization:** The Consortium welcomed a new Executive Committee Co-Chair and three new staff members: a Director of English Language Arts and Literacy; Director of Mathematics; and Director of Support for Under-Represented Students. Two key committees were launched—the English Language Learners and Students with Disabilities Advisory Committees—to provide guidance on development of an accessible assessment for all students. The Consortium also engaged five highly experienced and respected higher education leaders to work with the Governing States on a regional basis. These regional senior advisors are assisting the states in crafting and implementing plans to engage college faculty and administrators in understanding the Common Core, responding to the standards’ implications for higher education, and contributing to the development of the Smarter Balanced Assessment System. Also within this quarter, the Consortium was pleased to welcome South Carolina as a Governing State, bringing the total number of Governing States to 22.
### Stakeholder Communications

- Launched Smarter News, the Consortium’s monthly eNewsletter, which provides insights and new information on the development of the assessment system, activities in member states, and resources for educators.
- Provided monthly high-level talking points to state leads and Chiefs about recent Consortium developments and progress and opportunities for state involvement. These can be used to facilitate conversations or written communications with governors’ offices, school boards, and legislators.
- Continued weekly email updates to all member states and held regular meetings with state leads and Chiefs to ensure that open lines of two-way communication exist between leadership and Consortium members.
- Participated in more than 30 conferences and events, including CCSSO’s National Conference on Student Assessment, the American Federation of Teachers National Stakeholders Conference, the American Educational Research Association annual meeting, the National Council on Measurement in Education annual meeting, and the National Council of Teachers of Mathematics annual convention.
- Participated in coalition meetings and events related to the Common Core State Standards sponsored by the Math Common Core Coalition, the English Language Arts Common Core State Standards Coalition, and the Fordham Institute.

### Decision-Making and Participation

- Circulated a summary of the major decisions which are pending for the summative assessment. Further discussion and refinement will occur in concert with the K-12 and Higher Education State Leads.
- Hosted in-person meetings with the Governing States and Higher Education Leads to discuss the definition of college and career readiness. These meetings were part of CCSSO’s Implementing the Common Core Standards (ICCS) conference in April.
- Hosted meeting with state PIOs and Common Core policy leads and participated in a panel discussion with PARCC at CCSSO’s Communications Director Network Meeting in June.
- Recruited educators to support Pilot Test item and performance task development, stimulus reviews, and research on automated scoring and item procurement options. Engaged teacher involvement coordinators to serve as point of contact for recruiting teachers for development and research opportunities.

### Priorities for Next Three Months

- Facilitate cross-state communications and increase stakeholder outreach aligned with strategic communications plan.
- Expand monthly talking points to state Higher Education Leads.
- Develop factsheet on accessibility and accommodations.
- Meet with business organizations to increase awareness of Smarter Balanced.
- Create an ongoing dialogue with civil rights and equity organizations about the Consortium’s progress.
- Expand media outreach campaign by submitting articles by Smarter Balanced staff to key education membership and trade publications.

- Hold the bi-annual Collaboration Conference in September. During the series of meetings the chief state school officers, K-12 and Higher Education State Leads, work group members, and contractors will come together to discuss issues and advance the work of the Consortium.
- Secure a policy decision from Governing State Chiefs on the test blueprint for summative assessment.
- Provide the opportunity to all Consortium members to virtually attend July’s two-day Technical Advisory Committee meeting.
- Convene Higher Education Leads in Chicago at the State Higher Education Executive Officers (SHEEO) Policy Conference to discuss plans for implementing the Common Core State Standards and Smarter Balanced assessments.
## ACCOMPLISHMENTS

### Engage Our Members

- Initiated a Proficiency-Based Learning Task Force to explore the definitions and ultimate implications of proficiency-based learning in the development and implementation of state assessments aligned with the Common Core State Standards. All interested member states are invited to participate.

### Develop the System

#### Test Design

- Solicited member state feedback on accessibility and accommodations policy framework and materials.
- Approved the mathematics assessment claims and continued to collaborate with authors of the Common Core State Standards.
- Developed draft ELA and mathematics blueprints and computer adaptive testing rules for presenting items/tasks.
- Engaged experts to assist the Consortium in developing a research agenda and the approach to translations.
- Convened Technical Advisory Committee for two webinar meetings to review and discuss draft test designs.

#### Pilot Test

- Recruited, via our state leads and school representatives, students in multiple states to participate in cognitive labs that will study how students approach and interact with different types of computer-administered items.
- Developed draft Pilot Test sampling plan.
- Published updated item specifications and review guidelines and item writing/review training materials to public website.
- Recruited and trained educators to write and review items/tasks.
- Continued efforts to procure contractors to conduct test administration activities and reporting system development.

#### Formative Assessment Practices and Professional Learning

- Approved the Formative Assessment Master Work Plan, outlining the approach to and schedule for developing a digital library of professional development materials, resources, and tools.
- Began efforts to procure contractor(s) to perform work listed in the Formative Assessment Master Work Plan.

## PRIORITIES FOR NEXT THREE MONTHS

### Engage Our Members

- Convene in August the Consortium’s advisory committees for English language learners and students with disabilities.
- Meet with member states participating in CCSSO’s Implementing the Common Core Standards (ICCS) collaborative in Seattle.
- Educate member states on the topic of online refreshable Braille. Webinar to be held on July 20.

### Develop the System

#### Test Design

- Finalize accessibility and accommodations policy framework and seek Governing States review and approval.
- Begin work on developing initial achievement level descriptors.
- Conduct cognitive labs and analyze results.
- Define approach to item translations.
- Refine the Consortium’s college and career readiness definitions.
- Continue to work on designing the research agenda.
- Publish sample assessment items and tasks on public website.

#### Pilot Test

- Continue item writing and review efforts for Pilot Test items and tasks.
- Communicate with states regarding Pilot Testing interest and Smarter Balanced needs.

#### Formative Assessment Practices and Professional Learning

- Select contractor(s) and begin work on test administration services, reporting, and formative assessment contracts.
Quarterly Report
YEAR 2 QUARTER 3 (APRIL–JUNE 2012)

ACCOMPLISHMENTS

Develop the IT Backbone

- Launched and supported member state usage of the Technology Readiness Tool designed to evaluate the technology and infrastructure readiness of their schools.
- Developed hardware and operating system specifications for new technology purchases and announced guidelines in collaboration with PARCC. These guidelines provide clear information for schools and districts making new instructional technology purchases.
- Distributed best practices for state outreach to local districts regarding the Technology Readiness Tool.

Application Development

- Adopted Accessible Portable Item Protocol standard (APIP) as the standard data model for both the application of accessibility tags and seamless data transfer between technology applications.
- Continued development of the item authoring/item pool application.
- Collaborated with member states on a study of automated scoring technologies, which will inform our approach to machine scoring of the assessments.
- Continued efforts to procure contractor(s) for the test delivery application and reporting system.

Establish Rigorous Processes and Organization Structure

- Hired specialists Barbara Kapinus, PhD, as the Director of English Language Arts/Literacy; Shelbi Cole, PhD, as the Director of Mathematics; and Magda Chia as the Director of Support for Under-Represented Students.
- Engaged five senior higher education consultants to support regional outreach to and collaboration with public higher education agencies, systems, and institutions within the Consortium’s member states.
- Elected Michigan’s Dr. Joseph Martineau as new Executive Committee Co-Chair and launched nomination process for new Executive Committee Governing State member.
- Launched English Language Learners (ELL) and Students with Disabilities (SWD) Advisory Committees to provide guidance on development of an accessible assessment for all students.
- Began recruiting activities for two new positions: Chief Technology Officer and Director of Professional Learning.

PRIORITIES FOR NEXT THREE MONTHS

- Develop comprehensive minimum technology requirements for devices eligible to administer the assessments beginning in the 2014-15 school year.
- Release results of first Technology Readiness Tool survey; initiate second round of Technology Readiness Tool data collection.

Organization

- Hire a Chief Technology Officer and a Director of Professional Learning.
- Deliver Annual Performance Report to the U.S. Department of Education (USED) and hold on-site monitoring reviews with USED project managers.
- Engage consultant to support the Sustainability Task Force in developing post-grant options on how states will procure, administer, and maintain the assessment system after the federal grant ends in October 2014.
### ACCOMPLISHMENTS

**Establish Rigorous Processes and Organization Structure (continued)**

**Project Management**
- Finalized and obtained Governing States’ approval of the Formative Assessment Master Work Plan.
- Updated the Summative Assessment Master Work Plan and procurement schedule.
- Monitored progress of existing vendor contracts and managed the development and procurement efforts of multiple RFPs.

### PRIORITIES FOR NEXT THREE MONTHS

- Continue to monitor and track the work of the Consortium contractors against the Summative and Formative Assessment Master Work Plans.
# Procurements Managed by the State of Washington

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Status current as of 8/22/2012