

FALL 2026 TAC MEETING PRELIMINARY AGENDA

Meeting Facilitator: Ellen Forte, edCount, LLC (TAC Chair)	Date of Meeting: October 13, 2026, 8:00 a.m. - 4:30 p.m. PDT October 14, 2026, 8:00 a.m. - 12:00 p.m. PDT
Smarter Balanced Staff Liaison: Rochelle Michel, Executive Research Officer	

Day 1: Tuesday, October 13, 2026

Time & Location Pacific Time (PDT)	Topic	Presenter/Facilitator
7:00 a.m. - 8:00 a.m. (60 mins)	Breakfast	
8:00 a.m. - 8:30 a.m. (30 mins)	Welcome and Opening Remarks, Updates from Spring 2026 Meeting	Ellen Forte, TAC Chair and CEO & Chief Scientist at edCount, LLC Rochelle Michel, Executive Research Officer
8:30 a.m. - 9:00 a.m. (30 mins)	Update from Executive Director Tony Alpert will welcome TAC members, representatives from member states, and staff and provide an update on major Smarter Balanced initiatives.	Tony Alpert, Executive Director
9:00 a.m. - 9:45 a.m. (45 mins) Longboard Studio	TAC Member Introductions & Big Idea Sharing In addition to introductions, TAC members will share one big idea, which may include: a) a research project on which they are working, b) an emerging topic being discussed within the TAC member's area of expertise, OR c) a possible topic for a future Smarter Balanced TAC meeting. Each TAC member will have approximately 2-3 minutes to share.	All TAC Members
9:45 a.m. - 10:15 a.m. (30 mins)	Interim Assessment (Part 1) We will provide an overview of the current Smarter Balanced interim assessments, along with recent and planned enhancements to the interim assessment components.	Rochelle Michel, Executive Research Officer

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10:15 a.m. - 10:30 a.m. (15 mins)	Break	
10:30 a.m. - 12:00 p.m. (90 mins)	Interim Assessment (Part 2) Building on discussions from the Spring 2026 TAC meeting, this session will focus on psychometric considerations (adaptive pool development/management, growth measure, reporting) following the operational rollout of the new Smarter Balanced adjusted (adaptive) interim assessment in Oregon. We will review results of supporting analyses and discuss opportunities for scaling this model across the consortium.	Catherine Francis, Director of Psychometrics and Research Hotaka Maeda, Senior Psychometrician
12:00 p.m. - 1:00 p.m. (60 mins)	Lunch	
1:00 p.m. - 2:15 p.m. (75 mins)	Generative AI Implementation in Assessment Operations and Intellectual Property As Smarter Balanced explores the operational integration of Generative AI, understanding the technical and operational boundaries around Intellectual Property (IP) is critical. Building upon the core operational phases of assessment—including assessment design, item and task development, automated scoring, field testing, item calibration, reporting, and security—this session will focus specifically on the IP implications, risks, and strategic considerations involved in using Generative AI across these functions.	Randy Bennett, TAC Member & Principal at Assessment Innovation Matters
2:15p.m. - 3:00 p.m. (45 mins)	Project Signal – Multidisciplinary Accountability Assessment (Part 1) In this session, we will present an overview of Project Signal, the Competitive Grants for State Assessments (CGSA) submission (submitted in partnership with CT). We will detail the core vision, goals, and conceptual framework of this new multidisciplinary assessment. We will discuss how evidence-centered design will guide the project's design and potential implementation.	Michelle McAdams, Assessment Designer Rochelle Michel, Executive Research Officer
3:00 p.m. - 3:15 p.m. (15 mins)	Break	

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3:15 p.m. - 4:30 p.m. (75 mins)	Project Signal - Multidisciplinary Accountability Assessment (Part 2) In this part of the session, we will have an opportunity to discuss key considerations for Project Signal, including content coverage and learning progressions, the application of a multidimensional psychometric model, accessibility considerations given the intended domains to be measured, user-centered reporting, and building meaningful engagement loops for educators, students, and families.	Various TAC members and External Partners
4:30 p.m. - 4:45 p.m. (15 mins)	Day 1 Meeting Wrap-Up	Ellen Forte, TAC Chair and CEO & Chief Scientist at edCount, LLC Rochelle Michel, Executive Research Officer
4:45 p.m.	Adjourn	
5:00 p.m. - 6:00 p.m. (60 mins)	Social Hour	

FALL 2026 TAC MEETING AGENDA

Day 2: Wednesday, October 14, 2026

Time & Location Pacific Time (PDT)	Topic	Presenter/Facilitator
7:00 a.m. - 8:00 a.m. (60 mins)	Breakfast	
8:00 a.m. - 8:30 a.m. (30 mins)	Welcome and Day 1 Recap	Rochelle Michel, Executive Research Officer
8:30 a.m. - 10:00 a.m. (90 mins)	Theory of Action Development This session will focus on the ongoing revision of the Smarter Balanced Theory of Action (ToA). The ToA Working Group recently conducted a comprehensive review of the current 2010 ToA and our 2025-2030 Smarter Balanced Strategic Plan to identify gaps, align priorities, and recommend critical updates. We will get an update on the group's progress, examine a draft of the revised ToA, and provide feedback on the ToA.	Ellen Forte, TAC Chair and CEO & Chief Scientist at edCount, LLC
10:00 a.m. - 10:15 a.m. (15 mins)	Break	
10:15 a.m. - 11:45 a.m. (90 mins)	Grade 5 Learning Progressions In this session, the role of learning progressions in supporting Project Signal will be discussed. The session will include foundational concepts related to learning progressions, review common Grade 5 mathematics learning progression examples, weigh the benefits and risks of integration, and present recommendations for project inclusion.	Shelbi Cole, TAC Member & Managing Director of Math at Leading Educators
11:45 a.m. - 12:00 p.m. (15 mins)	Meeting Wrap-up/Next Meeting Dates	Rochelle Michel, Executive Research Officer Ellen Forte, TAC Chair and CEO & Chief Scientist at edCount, LLC
12:00 p.m. – 1:00 p.m. (60 mins)	Lunch	
1:00 p.m.	Collaboration Conference Begins	