

2023–24 Back to School **Assessment Playbook**

**Using the Smarter Balanced
Assessment System to
Improve Student Learning**



Smarter Balanced offers a balanced assessment approach, putting teachers and students on a path to progress throughout the school year. Tools for Teachers and interim assessments are free for members to use in support of high-quality instruction that lifts students to end-of-year targets.

The Smarter Balanced system has three main components: Summative Assessments, Interim Assessments, and Tools for Teachers.

Summative Assessments provide data and information for policymakers and stakeholders that can be used to support equity and help prioritize additional resources. Teachers, families, and students can use summative assessments to support conversations about educational goals.

Interim Assessments give educators information they can use to inform instruction well before they see a report of yearly results. The interim assessments match the style and rigor of the summative assessments, so educators can see how near students are to the target goals. Interim assessments can be administered in a standardized way to help students become familiar with the format and tools of the summative assessment. Interim assessments can be used in other ways, such as:

- Displaying selected items through a service provider’s item viewer,
- Solving items collaboratively in class on white boards,
- Incorporating peer feedback with brief writes or performance tasks, or
- Using a test item as an entrance or exit ticket to check students’ prior knowledge or how well they’ve understood a lesson.

Tools for Teachers is a website where educators can find teacher-created and vetted learning resources that address the same skills targeted in the interim assessments. The resources and strategies in Tools for Teachers can be accessed in two ways:

- I. By clicking the link to the Interim Connections Playlist on an interim assessment report to follow up on needs identified.
- II. By searching a key word or standard on the Tools for Teachers web page to supplement your curriculum with more extra support and differentiation on a tested skill or concept.

“Tools for Teachers allows us to use very well-designed, very well thought out resources that were created by educators just like us.”

Math Teacher, Montana

Returning to School

This Playbook explains how to make the Smarter Balanced system work for you. Note, the Smarter Balanced system is flexible to use so you can create a custom plan for high-quality instruction tailored to your academic focus. Here are some examples of how the Smarter Balanced system can support your goals and needs.

- State Education Agencies (SEAs) may use this document to support policies and the development of their training materials that, in turn, support Local Education Agencies.
- Local Education Agencies (LEAs) may use this Playbook to learn about resources that are available to support their instructional program plans.
- Curriculum and instructional leaders may use this Playbook as a resource to help develop plans for the assessment processes educators will use during instruction.
- Organizations that advocate for high-quality instruction may use this document as part of their advocacy efforts to disseminate information regarding best practices.

“I use interim assessment blocks to understand where my students are at academically and see what areas they might need more support around and what areas they excel in.”

ELA Teacher, Nevada

As you begin a new school year, use this Playbook to plan how you will use the Smarter Balanced system. The Playbook includes three sections.

- I. Choosing and Using the Right Resources
- II. Teaching and Measuring Learning Goals
- III. The Unique Role of the Interim Comprehensive Assessment (ICA)



Choosing and Using the Right Resources

Given that high-quality instruction includes embedded assessment, Smarter Balanced offers a variety of formative assessment and instructional resources teachers can use according to their classroom needs.

Balance Assessment with Informed Instruction

[Tools for Teachers](#) is a website that saves teachers time by providing high-quality instructional resources that are created by and for teachers. Tools for Teachers includes professional learning opportunities as well as strategies and lessons to supplement a curriculum or to address specific needs of students.

The strategic use of [Interim Assessment Blocks](#) (IABs) throughout the year may provide actionable information about students' performance on assessed standards to help teachers adjust their instruction. The Interim Connection Playlist (ICP) associated with the IAB provides information about performance criteria (below, near, above proficiency) as well as easy access to lessons keyed to that interim assessment. Note, the ICPs can be accessed through Tools for Teachers or via a link on the interim assessment report. Educators may use the interim assessments and the ICPs together or independently to best suit their teaching and learning goals.

Smarter Balanced Resources Support Grade-Level Instruction

Consistent with recommendations from [Council of Great City Schools](#), [Student Achievement Partners](#), and The New Teacher Project (TNTP), grade-level knowledge should be the priority so students can access grade-level content in subsequent years.

Smarter Balanced Interim Assessments are designed to measure grade-level knowledge and skills based on test blueprints and specifications. Smarter Balanced works with educators, students, and experts in the field to design and continue to review the assessment system. This includes bias and sensitivity reviews of Smarter Balanced assessments, as well as rigorous vetting of interim assessments to ensure that they are fair and equitable for all test takers. Teachers can use information from interim assessments to make decisions about what instructional next steps to take with their students.

“The thing that I see working about the interim assessments is just putting tools into teachers’ hands that are going to provide opportunities for their students to be successful.”

Middle School Principal, Oregon

The interim assessments include an array of accessibility resources to improve the access students have to grade-level content and increase the accuracy of information that teachers get from the results of the tests. All Smarter Balanced assessments are designed so that all students—no matter their accessibility needs and preferences—can participate meaningfully in the tests and demonstrate what they know and can do. The interim assessments include all the accessibility resources that are available in the summative assessment to allow for consistent accessibility supports across the two types of assessments. Smarter Balanced accessibility resources include over 60 embedded in the testing platform or locally-provided resources that are stratified into three tiers. (1) Universal tools (e.g., digital notepad, scratch paper) are available to all students based on student preference and selection. (2) Designated supports (e.g., translated pop-up glossary, color overlays) are available to students for whom a need has been indicated by an educator or team of educators (along with the student and their family) familiar with the student’s instructional needs. (3) Accommodations (e.g., braille, closed captioning) are available to students with a documented need noted in an Individualized Education Plan (IEP) or Section 504 Plan. Using these accommodations will give teachers an accurate and actionable picture of all students’ at grade-level learning. Smarter Balanced regularly adds more resources to the interim assessments so that teachers can continue to meet their students’ individual needs.

Tools for Teachers supports and scaffolds instruction with:

- Lessons that include differentiated support for grade-level content standards,
- Strategies for formative assessment to determine whether students are benefiting from instruction or if an adjustment needs to be made, and
- Strategies for accessibility to be sure all students are benefiting from the lesson.

Using Formative Assessment with Instruction

Teachers can begin capturing actionable data by incorporating formative assessment strategies from Tools for Teachers into their grade-level instruction. These strategies can give teachers a quick picture of students' understanding before, during, or after a lesson.

Begin Instruction

Grade-level instruction and **Tools for Teachers Formative Strategies**



Grade-level Smarter Balanced **Interim Assessment Blocks (IAB)**



Informed Instruction

Tools for Teachers Interim Connections Playlists and continued grade-level instruction

For a more granular view of students' understanding, teachers can use Interim Assessment Blocks. During the implementation of a multi-day lesson or unit, a teacher may want to select and administer a Smarter Balanced interim assessment that is aligned to the content of instruction in order to gather information about what students are learning and what they need to know.

Interim assessments can be leveraged during the school year to best align with locally determined scope and sequence guidance. Interim assessments can provide information alongside other data sources to help the teacher adjust the time and intensity of instruction or otherwise take different steps to meet their students' needs. Teachers can find a collection of Tools for Teachers instructional resources aligned to the IAB in Interim Connections Playlist.

When deployed systematically, a feedback loop of formative assessment data and adjusted instruction is a proven way to keep students on track to meet end-of-year performance targets.

II

Teaching and Measuring Learning Goals

Part of Smarter Balanced’s mission is to help educators understand the performance targets and rigor students will face on the summative assessment. Local Education Agencies (LEAs) can use this information to make decisions about what content to prioritize.

Teachers can use the [Smarter Content Explorer](#) to learn how the targets assessed on interim assessments cover the content standards. They can also find the test blueprints and range-level achievement descriptors on the website.

Use the Smarter **Content Explorer** to deeply understand the knowledge and skills covered by the targets assessed in a Smarter Balanced Interim Assessment Block



Choose the right Interim Assessments based on the blueprints available in the **Content Explorer** or based in the items in the Smarter **Item Catalogue**

Flexibility to Prioritize Content

The Smarter Balanced assessment system was designed to help educators collect and act on evidence of student learning of college- and career-ready standards. Educators can use a variety of Smarter Balanced resources to help them prioritize and integrate interim assessments into their planned instructional scope and sequence for the year.

For example, teachers can use the Interim Assessment Item Portal (IAIP) available in Tools for Teachers to view and select or deselect individual assessment items to tailor content covered by an interim assessment so it better aligns with the sequence of their instruction. With the ability to view assessment items, educators can better understand assessment content in order to guide year-long planning and expose students over time to like-items they may experience on the summative assessment.

An Exemplar: Mapping the Interim Assessments Based on Learning Goals

State content standards include important content that students should learn. However, educators may decide to prioritize or emphasize specific content. [Student Achievement Partners](#) (SAP) developed recommendations for [Priority Instructional Content in English Language Arts/Literacy and Mathematics](#) to support educator decisions about how to focus learning on foundational concepts at each grade level to reinforce the overall coherence of college- and career-ready standards.

Tables 1 and 2 show how Smarter Balanced Interim Assessments Blocks align with Student Achievement Partners' major work focus at each grade. These Interim Assessments Blocks can be used as measures to help teachers adjust their instruction, while maintaining a rigorous formative assessment process. The tables serve as exemplars for demonstrating how the Smarter Balanced interim assessments may be mapped to prioritized instructional scope.

Table 1 shows the IABs aligned with the Student Achievement Partners' major work for mathematics for grades 3–8.

Table 1. **Mathematics**

Grade	Major Work	Smarter Balanced Interim Assessments Aligned to the Major Work**					
3	SAP Grade 3 Focus Document	Properties of Multiplication and Division Time, Volume, and Mass	Multiply and Divide within 100 Number and Operations—Fractions	Operations and Algebraic Thinking* Linear and Area Measurement	Multiplication and Division: Interpret, Represent, and Solve	Measurement and Data*	Four Operations: Interpret, Represent, and Solve
4	SAP Grade 4 Focus Document	Fraction Equivalence and Ordering Place Value and Multi-Digit Whole Numbers	Fractions and Decimal Notation Number and Operations—Fractions	Four Operations: Interpret, Represent, and Solve	Number and Operations in Base Ten*	Build Fractions from Unit Fractions	Multi-Digit Arithmetic: Place Value and Operations
5	SAP Grade 5 Focus Document	Operations with Whole Numbers and Decimals	Add and Subtract with Equivalent Fractions	Number and Operations in Base Ten*	Number and Operations—Fractions*	Place Value System	Volume Concepts
6	SAP Grade 6 Focus Document	The Number System* Rational Number System	Divide Fractions by Fractions Algebraic Expressions	Expressions and Equations* One-Variable Expressions and Equations	Dependent and Independent Variables	Ratios and Proportional Relationships	One-Variable Expressions and Equations
7	SAP Grade 7 Focus Document	Ratios and Proportional Relationships	The Number System	Equivalent Expressions	Expressions and Equations*	Algebraic Expressions and Equations	
8	SAP Grade 8 Focus Document	Congruence and Similarity	Proportional Relationships, Lines, and Linear Equations	Analyze and Solve Linear Equations	Expressions and Equations I*	Functions	Geometry*

*Tests denoted with an asterisk are Interim Assessment Blocks. Tests without an asterisk are Focused Interim Assessment Blocks. See the [Interim Assessment Overview](#) for more information. **Major work as defined by Student Achievement Partners

ADDITIONAL SUGGESTIONS

- Use the [Sample Items Website](#) as a resource for instructional activities, such as entrance/exit tickets with individual lessons.
- Use additional available interim assessments to support and enhance learning whenever educators want to gain insight into student needs.

Table 2 describes text-based learning objectives for English Language Arts/Literacy as recommended by Student Achievement Partners. Rather than isolating each of these skills, educators should look for opportunities to engage their students in activities that reinforce these 14 foundational standards. Items on these interim assessments assess this collective body of standards, with the exception of two standards, which are best observed directly by the teacher:

- RF.4: Describes students' abilities to read with fluency throughout the grade levels, which may include aspects in lower grades such as phonics, decoding, and syllabication.
- SL.1: Describes students' abilities to engage in a variety of effective collaborative conversations.

Two standards (RI.10 and RL.10) describe year-end skills to read and comprehend information and literary texts. These two standards underpin each test question found on the reading Interim Assessment Blocks because these IABs include test questions that draw upon grade-level text. While no individual item in the Smarter Balanced assessment is aligned to this specific standard, the collective body of items in the reading claim inherently address these standards.

Table 2. **English Language Arts/Literacy**

Grade	Learning Objectives	Smarter Balanced Interim Assessments Aligned to the Learning Objectives**		
3-11	Provide sequences of questions that engage students deeply with the text and build understanding. Cultivate a student’s ability to read carefully and grasp information—both what the text says explicitly and when drawing inferences from text.	Read Literary Texts*	Read Informational Texts*	Performance Task*
3-11	Use text-based questions to focus on academic and domain-specific words.	Read Literary Texts*	Read Informational Texts*	Language and Vocabulary Use
3-11	Within writing opportunities, address students’ ability to demonstrate command of writing and conventions.	Editing	Performance Task*	Write and Revise Narrative Texts Write and Revise Informational/Explanatory Texts Write and Revise Opinion/Argumentative Texts
3-11	Participate in research tasks where students explore multiple texts and auxiliary resources to build knowledge on a topic.	Research: Interpret and Integrate Information Research: Analyze Information and Sources Research: Use Evidence	Performance Task*	Research/Inquiry*
3-11	Encourage students to cite specific text evidence when supporting their own points in writing. Evaluate others’ use of evidence.	Read Literary Texts*	Read Informational Texts*	Performance Task*
3-11	Provide a variety of text-dependent writing and speaking task options for students to express their comprehension, knowledge, and skills.	Write and Revise Narrative Texts Write and Revise Informational/Explanatory Texts Write and Revise Opinion/Argumentative Texts	Listen/Interpret	Performance Task*

*Tests denoted with an asterisk are an Interim Assessment Block. Tests without an asterisk are Focused Interim Assessment Blocks. See the [Interim Assessment Overview](#) for more information. **Clusters as defined by Student Achievement Partners

ADDITIONAL SUGGESTIONS

- Use the Interim Assessment Block Performance Tasks as opportunities to integrate activities during reading and writing instruction, using passages from the [Sample Items Website](#) as additional texts to help students build knowledge of the topic under study from curricular materials.
- Use the reading passages in the interim assessments as an opportunity for close reading and additional formative assessment evidence.
- Use passages from the [Sample Items Website](#) as additional instructional activities.
- Use the [Smarter Annotated Response Tool \(SmART\)](#) to better understand how student responses to performance task items are scored on Smarter Balanced assessments and support writing instruction.



The Unique Role of the Interim Comprehensive Assessment (ICA)

Most of the Smarter Balanced Interim Assessment Blocks were designed for students to complete within a class period. This design supports teachers embedding the Interim Assessment Blocks (IABs) between instruction for a multi-day lesson. Interim Comprehensive Assessments (ICAs), however, were designed to measure a broader set of content and provide a high-level overview of students' strengths and areas in need of improvement.

Therefore, ICAs may be helpful:

- As a source of information if a student is new to the state and educational records are not available,
- When prioritizing the allocation of additional instructional support, and
- As a mid-year check to determine progress.

While student responses to the items from an ICA might be leveraged as part of the formative assessment process, it is more likely that the IABs will better meet educators' needs at the beginning of the school year.

The diagram below describes the cases in which an ICA and IAB are likely most useful.

Interim Comprehensive Assessment (ICA)

- Students new to the state whose educational record is incomplete.
- A mid-year progress check.

Interim Assessment Blocks (IAB)

- Small sets of test questions from the IABs may be used during instruction as part of a teacher's formative assessment process.
- Tests may be administered partway through instruction in support of the formative assessment process, and teachers can use the Connections Playlists in Tools for Teachers to access resources aligned with the test results.
- Tests may be administered at the end of a unit as part of a teacher's process to determine if students have learned the skills identified by the content standards.

Conclusion

The Smarter Balanced dynamic system of tools was designed in consultation with educators from across the nation to help inform teaching and learning. However, in response to changing needs, teaching and learning continue to evolve at a greater rate than they have in the past. The consortium of Smarter Balanced member states will engage in a continuous improvement process to help address the emerging needs of both educators and students in utilizing formative and interim assessment resources.

Special thanks to Student Achievement Partners for its contribution to this document.

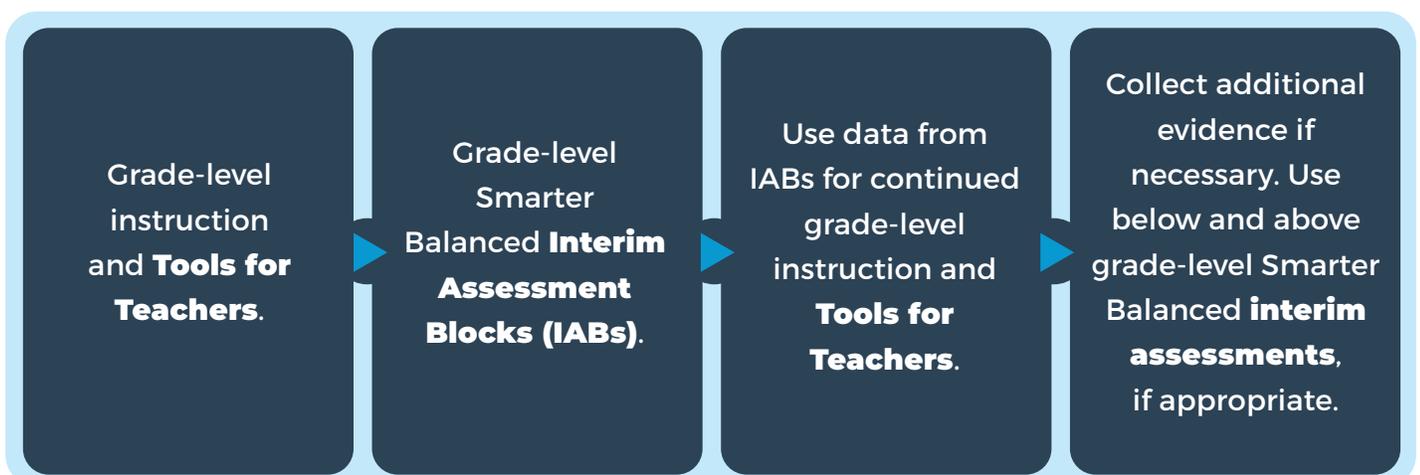
Questions & Answers

Can Smarter Balanced interim assessments measure knowledge and skills from a student's prior grade?

The primary purpose of the Smarter Balanced interim assessments is to support instruction. For example, when choosing which interim assessment to use, an educator may use interim assessments that measure students' knowledge and skills aligned to the students' enrolled grade or outside of the enrolled grade (above or below).

While this flexibility is intentional to support a variety of different scenarios, educators should use great caution when considering assessments that target below grade-level content given that instructional time is limited during the year and grade-level content requirements alone are significant. Additionally, the support that students need to successfully engage with the grade-level content is often more nuanced and better understood through focused tasks or discussions than by administering an entire interim assessment.

A possible model that emphasizes grade-level content and helps address students' specific needs regarding content from prior grades is:



Can the Smarter Balanced interim assessments be used before instruction starts?

As described above, the preferred process is to use formative assessment strategies to gain insights following instruction. However, teachers may instead select and administer a Smarter Balanced interim assessment that is aligned to the skills included in their upcoming units. This may be helpful to inform lesson planning so that teachers are better able to meet students' diverse instructional needs.

As described below, a teacher may administer an interim assessment, then use the resources in the reporting system to analyze the test scores and student responses to items. In addition, the teacher may also use the Connections Playlists to inform instruction and to address specific students' needs.



How is the purpose of the interim assessments different from the summative assessment?

The interim assessments are designed to be resources that teachers use to adjust instruction and help students accelerate their learning. By strategically using the interim assessments to gather detailed information about what students know and can do throughout the year, educators can make evidence-based instructional decisions that accelerate student learning toward achieving proficiency in grade-level content.

The summative assessment is an end-of-year test designed to serve as a signal of high-quality instruction, support policymakers' decision making, provide comparable information across schools and districts within a state, and support accountability systems. These are critical uses and they help ensure that the educational system attends to equity and clearly communicates its progress in helping all students achieve college and career readiness.

In what ways are the interim and summative assessments similar?

Some significant elements of design exist that are common among the Smarter Balanced interim and summative assessments:

- Items were written and reviewed for sensitivity and bias in the same manner.
- Items were written and reviewed for accuracy, content alignment, and grade-level alignment in the same manner.
- Items were field tested in the same manner at the same time. Items were calibrated and placed on the same scale; and
- Items include the same accessibility features and resources.

In addition, Smarter Balanced Interim Comprehensive Assessments have similar blueprints to the summative assessments.