

**Smarter Balanced
Assessment Consortium:
English Language Arts & Literacy
Computer Adaptive Test (CAT)
and Performance Task (PT) Stimulus
Specifications**

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Smarter Balanced English Language Arts & Literacy Stimulus Specifications

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Smarter Balanced Assessment Consortium: English Language Arts & Literacy Stimulus Specifications

Introduction

The English Language Arts (ELA) & Literacy Stimulus Specifications assist item writers in selecting appropriate topics, features, and formats for developing items and tasks. These parameters are informed by best practices described in the Common Core State Standards (CCSS), the *Smarter Balanced Assessment Consortium Content Specifications for ELA*, and the practices prevalent in Smarter Balanced states’ guidelines. These specifications provide guidance on appropriate kinds of texts, grade level-appropriate topics and complexity, and other features pertinent to the domain of ELA. Item writers should follow these guidelines and refer to the *Smarter Balanced Assessment Consortium Content Specifications for ELA*, the *Smarter Balanced Assessment Consortium Guidelines for Accessibility and Accommodations*, and the *Smarter Balanced Assessment Consortium Bias and Sensitivity Guidelines* when developing or selecting stimuli.

Most items/tasks for assessment include a stimulus along with a set of questions to which the student responds. Stimulus materials are used in ELA assessments to provide context for assessing the knowledge and skills of students. These stimuli are diverse. They can be traditional passages but viewed on a computer screen; audio presentations with images for students to listen to; simulated web pages for students to use for research; or scenarios to react to. Item writers need to understand how stimuli used in the Smarter Balanced assessments are similar to and different from stimuli used in traditional assessments. These guidelines explain these similarities and differences and provide parameters for stimulus use.

Wise use of technology can support the expectation for increasingly complex thinking by providing an array of stimuli in the Smarter Balanced assessment. Item writers can use stimuli to set up questions, to “kick start” thinking, so students can respond to selected-response and constructed-response items.

The Common Core State Standards for ELA address four strands: reading, writing, speaking and listening, and language. One key goal of the Common Core State Standards is for students to be able to read and listen to increasingly more complex texts and write and deliver increasingly more complex responses as they proceed through school, with a focus on being college- and career-ready as they exit high school. Stimuli that pose appropriate challenges must be sufficiently complex to elicit responses that demonstrate college- and career-readiness. Students whose work shows

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college- and career-readiness in ELA will exemplify the vision expressed in the Common Core State Standards. A college- and career-ready person is one

- who reads, understands, and enjoys complex works of literature;
- who reads through extensive amounts of information in print and digital form, both habitually and critically;
- who writes effectively for different purposes and audiences and uses writing to generate, organize, make sense of, and deeply understand information to produce new insights and ideas;
- who communicates effectively – demonstrating active listening, inter-personal communication, and the ability to integrate oral/visual/graphic information;
- who uses inquiry and critical thinking to produce insights, perspectives, and solutions;
- who demonstrates both cogent reasoning and the use of evidence in decision making in all aspects of life; and
- whose skills in reading, writing, listening and speaking, and language inform all language-based creative and purposeful expression.

The *Smarter Balanced Assessment Consortium Content Specifications for ELA*, which is referred to in this document, is a bridge document linking the CCSS to the Smarter Balanced assessment claims and targets. There are four claims for ELA/Literacy, each with a number of targets that provide evidence to support each claim. The four claims are

Claim #1 – Students can read closely and analytically to comprehend a range of increasingly complex literary and informational texts.

Claim #2 – Students can produce effective and well-grounded writing for a range of purposes and audiences.

Claim #3 – Students can employ effective speaking and listening skills for a range of purposes and audiences.

Claim #4 – Students can engage in research/inquiry to investigate topics, and to analyze, integrate, and present information.

Smarter Balanced ELA content specifications emanate from the Common Core State Standards and demand the same rigor, the same complexity, and the same expectation of college- and career-readiness. The Smarter Balanced assessment is different from previous assessments because it is more stringent, expecting students to demonstrate complex abilities in reading (Claim 1), writing (Claim 2), listening (Claim 3), research (Claim 4), and language (embedded in Claims 1 and 2).

Types of Stimuli

Stimuli Formats

Because many of the claims and targets may be assessed in a variety of ways, the stimulus formats may vary. They may include works of art, graphics, excerpts from literary fiction, poems, historical documents, research findings, articles from newspapers and magazines, speeches, cartoons, lectures, and debates. The use of various scenarios is also possible and may include simulated Internet or web pages. Articles or editorials expressing opposing points of view are suitable for argumentative writing.

Claim 1: Reading Stimuli Specifications for Computer Adaptive Testing (CAT) Items

For Claim 1 Reading, the stimuli should be literary or informational texts that have the appropriate text complexity for the grade level being assessed. The associated items must assess the student's ability to read complex texts and not rely on prior knowledge.

Reading stimuli must

- be clear and of fine quality;
- be rich in content to support well-developed questions;
- adhere to the Common Core guidelines in term of text type:
 - grades 3-5: 50% literary and 50% informational
 - grades 6-8: 45% literary and 55% informational
 - high school: 30% literary and 70% informational;
- include informational texts without a narrative structure in at least 50% of the informational selections in grades 3-5;
- NOT include informational texts that have a narrative structure beyond grade 5;
- meet the demands of grade-level interest and appropriateness;
- have an appropriate text complexity level for Claim 1 Reading literary and informational passages on the CCSS grade band;
- adhere to descriptions and the level of quality set forth in the Common Core State Standards, the *Smarter Balanced Assessment Consortium Content Specifications for ELA*, and this document;
- consider accessibility concerns (see the *Smarter Balanced Assessment Consortium Accessibility and Accommodations Guidelines*);
- adhere to the Smarter Balanced Bias and Sensitivity Guidelines (see the *Smarter Balanced Assessment Consortium Bias and Sensitivity Guidelines*);

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- and include titles, authors' and artists' names, sources, and publication dates (for newspaper and magazine articles and cartoons);
- identify the speakers, occasion, location, and date (for lectures and debates).

Some reading stimuli may contain text features (such as images, tables, charts, photographs, and artwork) that provide additional information to students. Text features must

- be clear and of fine quality;
- relate directly to the text of the stimulus;
- be true to the original if reproduced from another source;
- add to the complexity and worth of the text as a whole; and
- be identified by title, artist, and year completed (fine art only).

Dual-Text Stimuli

Stimuli developed for the reading assessment should include the selection of dual texts in addition to the use of single texts. The CCSS emphasizes the importance of providing opportunities to further enhance students' critical thinking and analytical skills both within and across texts. Dual-texts should be connected in topic and purpose, and while texts may vary by mode and genre, there is specific guidance when developing items for dual text stimuli.

For Targets 1-7, when a dual-text set contains one literary and one informational text, the literary text (text #1) is the primary focus, and the set of items must include items from the literary stimulus as well as items written across both texts. The informational text (text #2) **must only** be used as a foundational piece for the literary text, and no items can be written for **only** the informational text. If both texts are literary, items may be written to either or both. All dual-text stimuli sets should contain between **25-40% items written across both texts**. When developing items from dual-text, Task Model 5 (short text constructed response-WR) should be written using the Appropriate Stems for Dual-Text Stimuli only to ensure students will have the opportunity to respond in writing to information from both texts. Between 25-40% of all other items written in the dual-text set should be written across texts. The title of the each text should be included in the stem when more than one text is used. Dual-text is considered long text and thus the word count for the two texts together should not exceed the maximum word count for a long text.

For Targets 8-14, when a dual-text set contains one literary and one informational text, the informational text (text #1) is the primary focus, and the set of items must include items from the informational stimulus as well as items written across both texts. The literary text (text #2) **must only** be used as a background piece for informational text, and no items can be written for **only** the literary text. If both texts are informational, items may be written to either or both texts. All dual-text stimuli sets should contain between **25-40% items written across both texts**. When developing items from a dual-text set, Task Model 5 (short text constructed response-WR) should be written using the Appropriate Stems for Dual-Text Stimuli only to ensure students will have the opportunity to

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respond in writing to information from both texts. Between 25-40% of all other items written in the dual-text set should be written across both texts. The title of each text should be included in the stem when more than one text is used. Dual-text is considered long text and thus the word count for the two texts together should not exceed the maximum word count for a long text.

Claim 2: Writing Stimuli Specifications for Computer Adaptive Testing (CAT) Items

Writing stimuli for the CAT are discrete and written by the item developer. Writing stimuli must have the following characteristics:

- provide a specific grade-appropriate audience, purpose, and task;
- sound like authentic student writing for the targeted grade (content, language/vocabulary, and sentence structure of each stimulus should be similar to that of students in the tested grade);
- model good writing. Stimuli should NOT promote formulaic writing (e.g., topic sentence, three development sentences, and a concluding sentence that restates/repeats, or summarizes the topic sentence). When a Claim 2 stimulus includes an introduction, it should avoid an obvious preview of supports/reasons; when stimulus provides a concluding statement/paragraph, that conclusion must do more than summarize information presented (see standards: emphasize the importance of claim, reflect on the experience, explain the significance of, etc.);
- be appropriately complex for the skill being assessed;
- contain accurate information if informational/explanatory or opinion/argumentative; and
- be consistent with the purpose and intent of the target and standard being measured.

Writing Purposes

The three purposes (text types) of Claim 2 stimuli are narrative, informational (for grades 3-5)/explanatory (for grades 6-11), and opinion (for grades 3-5)/argumentative (for grades 6-11):

- Narrative stimuli should reflect rich content and quality writing in which the writer uses narrative strategies. (For Grade 11, Target 1a, narratives and narrative strategies can be employed in the service of explanatory or argumentative purposes.) Narratives are not told, they are shown through a variety of elaborative techniques.
- If an informational/explanatory stimulus is an excerpt from a report, the item writer should plan a larger report and pull an appropriate excerpt from the larger piece of writing. Grades 3-5 will have informational stimuli. Grades 6-11 will have explanatory stimuli.
- An opinion/argumentative stimulus should also appear to have been excerpted from a larger essay. Grades 3-5 will have opinion stimuli. Grades 6-11 will have argumentative stimuli. Argumentative essays include claims and counterclaims that are supported by reasons and credible evidence. Argumentative stimuli must be based on debatable issues, with two defensible positions.

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Write Brief Texts Stimuli (Assessment Targets 1a, 3a, and 6a)

- For brief writes Target 1a elaboration items, there is one part to the stimuli:
 1. “Draft Student Writing” that responders will finish.
- For brief writes Targets 3a and 6a elaboration items, there are two parts to the stimuli:
 1. “Draft Student Writing” that responders will finish.
 2. “Student Notes” to provide information for students.

Guidelines for “Draft Student Writing”

- Writing stimuli included in brief write items should follow these word count guidelines:
 - Between 150 and 200 words for the elementary grade band
 - Between 200 and 250 words for the middle school grade band
 - Between 250 and 300 words for the high school grade band
- For Target 1a, stimuli could be a student’s short story, a narrative of a family trip, a narrative of an experience with a friend, a narrative of an event at school. For high school, one purpose of narrative writing can frequently be to support broader writing purposes; while the purpose of a high school stand-alone narrative text can occasionally be to entertain or tell a story, narrative writing for the sake of narrative is less frequently assigned in high school.
- For Target 3a, stimuli should reflect a variety of informational (for grades 3-5) or explanatory (for grades 6-11) forms (essay, research and/or news report, article, etc.).
- For Target 6a, stimuli should be brief opinion writing for grades 3-5 or argumentative texts for grades 6-11. This is an opinion/argumentative target, not persuasive. The stimuli should be decidedly opinion/argumentative, having two clear and debatable sides or positions, supported with reasons and/or evidence. Appeal to emotion is inappropriate for opinion/argument.

Guidelines for Student Notes:

- For Target 3a and 6a items, the stimulus will provide, in addition to the student's draft, some source of information such as student notes, a chart, or a bulleted list, or a similar fictitious, but factually accurate, source.
- The purpose of the notes is to provide **accurate** details and evidence that students can use in the development and elaboration of their responses.
- While the notes may have some overlap with the information in the stimulus, they should primarily consist of information that is in addition to the stimulus.

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- Notes should be presented in an authentic a manner as possible and should not lend themselves to being listed or copied and pasted directly into the student responses. To that end, notes should **NOT** be:
 - written as full sentences. (They must be sparse enough so that students must **elaborate** by using their own words.)
 - presented in any particular order.
 - grammatically parallel.
- Notes should be boxed so as to clearly distinguish them from the stimulus. For grades 3-5, a heading preceding the notes should read: *The student has taken the following notes from a trustworthy source.* For grades 6-8 and 11 it should read: *The student has taken the following notes from a credible source.*
- Students should **not** be expected to include all notes in their responses.
- There should not be an overwhelming number of notes;
 - Between 50 and 60 words for the elementary grades
 - Between 70 and 80 words for the middle school grades
 - Between 90 and 100 words for the high school grades
- Students will need to select the appropriate details/evidence to include. While not being purposely irrelevant or misleading, not all notes will necessarily serve the student’s purpose for the task. For example, while an overall stimulus written for older students might be about both a given problem (e.g., invasive species) and its solution, the task might call for the student to address only a solution. Therefore, not all the notes will be applicable to the task.

Guidelines for Notes that Provide Evidence:

- Avoid giving reasons as notes (which the students can just copy into their responses).
- Examples of types of notes that may be provided include:
 - survey results (At the elementary level, this might include surveys of peers or family. At the middle and high school levels, more formal surveys, e.g., Pew reports, may be used.)
 - expert testimony (At the elementary level, this might include: parents, teachers, the principal, the mayor, the newspaper, etc. Examples for middle and high school: discipline-specific experts, government officials, etc.)
 - citations/information from credible publications
 - statistics

Revise Brief Texts Stimuli (Targets 1b, 3b, and 6b)

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Writing stimuli included in revision items should follow these guidelines:

- No more than 150 words for the elementary grade band
 - No more than 200 words for the middle school grade band
 - No more than 250 words for the high school grade band
- Examples of appropriate stimuli for revision items include excerpts from student-written informational/explanatory, opinion/argumentative, and narrative papers.
 - Stimuli used in evidence/elaboration items should be lacking supporting evidence or elaboration.
 - Stimuli used in organization items should be lacking one or more key organizational elements, such as a topic sentence, transition words, or conclusion.

Language/Vocabulary Use Stimuli (Target 8)

Writing stimuli included in language/vocabulary items should show a variety of the narrative, informational/explanatory, and opinion/argumentative text types. Target 8 stimuli should be enhanced by the replacement of a vocabulary word/phrase and should be worthy of the new word choice (e.g., to fit the tone, audience, purpose, and other elements specific to each grade level).

Edit Stimuli (Target 9)

Writing stimuli included in conventions items should show a variety of the narrative, informational/explanatory, and opinion/argumentative text types. Target 9 stimuli should contain errors in capitalization, punctuation, spelling, or grammar usage.

All writing stimuli should follow the guidelines for appropriateness given in this document. In some instances a content-specific vocabulary word may be on or above grade level as long as the word is easily decodable and has sufficient, explicit context to support the meaning and to avoid any prior knowledge needed of the word.

Claim 3: Listening Stimuli Specifications for Computer Adaptive Testing (CAT) Items

- Listening (Claim 3) stimuli are approximately 1 minute audio presentations used to measure listening.
- The stimulus should reflect the components noted in the qualitative measures rubric for listening stimuli (purpose or meaning, auditory structure, oral language features, knowledge demands) and meet the appropriate complexity levels by grade.

Audio presentations should also

- be informational and not narrative;
- at grade-level complexity;
- be clear and of fine quality;

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- meet the demands of grade-level interest and appropriateness;
- be rich enough to support well-developed questions;
- adhere to descriptions and the level of quality set forth in the Common Core State Standards, the *Smarter Balanced Assessment Consortium Content Specifications for ELA*, and this document;
- consider accessibility concerns (see the *Smarter Balanced Assessment Consortium Accessibility and Accommodations Guidelines*);
- adhere to the Smarter Balanced Bias and Sensitivity Guidelines (see the *Smarter Balanced Assessment Consortium Bias and Sensitivity Guidelines*);
- contain crisp sound with no distracting background noise;
- NOT be overly complex (scattered discourse and/or lack of restatement of key information can make the short-term memory load overly challenging).

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Claim 4: Research/Inquiry Stimuli Specifications for Computer Adaptive Testing (CAT) Items

- Research (Claim 4) stimuli are discrete and written by the item writer.
- The stimulus should be a good model of grade-appropriate text.
- The stimulus should sound and look like authentic research and tap a variety of topics/areas.
- Most Claim 4 stimuli should appear to be excerpts from research sources.
- Examples of Claim 4 stimuli may include, but are not limited to, excerpts from research sources from various academic disciplines, simulated journal articles, informational books/websites, paired excerpts on the same topic, or primary and secondary sources. All Claim 4 stimuli must be informational text. Primary source material may be from public domain documents. If the stimulus contains a visual with data expressed quantitatively, the stimulus should clearly provide information for research and not assess the student's ability to discern quantitative data, as in a math item.
- Although the item writer is creating the research source and visual stimuli, the information **MUST be accurate** and based in fact (be sure to fact check) and contain acknowledgments in the metadata. If a study mentioned in the stimulus is real, then the study should contain a correct acknowledgement to the author.
- The length of the stimuli will vary by item and will be dependent on the task and text; However, these guidelines should be followed:
 - No more than 150 words for the elementary grade band
 - No more than 225 words for the middle school grade band
 - No more than 300 words for the high school grade band
- Claim 4 stimuli should follow the guidelines for appropriateness given in this document; however, the complexity should be one grade level below the assessment level. The vocabulary used in the stimulus should be one grade level below the assessment level. In some instances content-specific vocabulary may be on or above grade level as long as the word is easily decodable and has sufficient, explicit context to support the meaning and to avoid any prior knowledge needed of the word.

Introductions to Reading Texts and Listening Presentations

On Smarter Balanced assessments, some reading passages may need brief introductions to establish an important context or orientation to the text to eliminate confusion. All listening presentations will need brief introductions. Each introduction should provide only the information necessary for the student to understand the context of the stimulus. Extraneous information should be omitted. A date or year of publication or source will be included in the introduction only if understanding is dependent on knowledge of the date or if content might become outdated. The purpose of the written introduction is to provide context or background for students before they read or listen to the stimuli. The introduction will not be so overly specific as to cue any items that are testing purpose, meaning, or audience Please note: The full title of the original passage and author

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should be written as an acknowledgement below the text (see Smarter Balanced Style Guide for more information).

Guidelines for the Use of Images

Graphics may be included in ELA/Literacy stimuli for clarity, student engagement, or other relevant purposes related directly to the central ideas of the stimulus. All images should be provided in formats that will be accessible to students with varying abilities, including students who are visually impaired. Graphics should only contain information that will help students understand or process information. Because graphic images must be provided to visually impaired students through a verbal description or a tactile graphic using an embosser, the following guidelines should be followed in selected graphics to accompany stimuli for reading, writing, listening, and research.

Charts: Charts can be used as part of stimuli. Charts should have clear text and numerals. Simpler versions of charts, such as timelines, can be used in stimuli if the graphics are short and clear. A vertical orientation of a timeline is suggested for items that may be provided in Braille.

Flowcharts and Tables: Flowcharts, tables, and similar figures have straightforward formatting in Braille and often can be described without tactile graphics. Information in tables should be organized clearly. The table or flowchart should not be too large or contain large amounts of text.

Photographs: While illustrative, photographs are often difficult to provide in an accessible format. Written descriptions that are created to describe photographs may impact the content of the stimulus or associated items. For this reason, photographs should be avoided except in Claim 3 (Listening).

Maps: Simple maps can be provided to students as tactile graphics. Maps should be clear, without text or numerals superimposed on other graphic elements. Maps should contain the minimum information required for the intended purpose. Large, complex maps may be difficult for students to interpret when converted to tactile graphics covering more than one page.

Diagrams: Simple diagrams may be useful in helping students understand information. Diagrams should be short, simple, and clear. More complex diagrams may require an accompanying description and should only be used if necessary to support the intended purpose of the stimulus.

Screen shots: Visually impaired students interact with web pages differently than sighted students. This should be considered in using screenshots, mock search pages, or other web-based visuals. Screen shots or web-page visuals should focus on the text information on the page rather than visual elements. For example, a stimulus might consist of various links to be evaluated (rather than various images). Images from screen shots or web pages may require accompanying descriptions. Such material introduces the potential for interference with the intended purpose of the stimulus or with the constructs being measured by the accompanying items.

Specifications for Visual Elements Associated with Audio Clips (Claim 3)

Images that accompany listening stimuli **MUST** enhance student understanding of the audio clip. The images that are selected **MUST** be purposeful, relate directly to the central ideas of the presentation,

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and augment the learning experience. Generally, the images should not contain text, and items associated with the audio clips should not be based on or refer to any element in images.

When to use images to enhance audio clips:

- to assist with transitions
- to provide visual support for the organization of text
- to provide visual support for a topic that lends itself to diagrams, images, or other graphical representations (examples: the water cycle, branches of government, Ring of Fire map)
- to provide context and support for the listening text (Examples: a picture of a volcano or a sandy desert to ensure that students know what these phenomena look like while listening to text.)

Possible types of images that could enhance audio clips:

- diagrams
- maps
- photographs
- drawings

Claim 1 Reading and Claim 3 Listening Stimuli Metadata

Each Claim 1 and Claim 3 stimulus will have metadata provided to document whether the stimulus adheres to the specifications and whether the stimulus is grade-level appropriate. Metadata provided with each Claim 1 and Claim 3 stimulus include the following:

- unique identification number
- title
- author
- source (permissioned, commissioned, or public domain)
- reading: informational or literary
- length (number of words in passages, number of seconds if recorded)
- readability level for both qualitative (Qualitative Measures Rubric for Informational Texts) and quantitative (Flesch-Kincaid and Lexile) measures. Text complexity analysis worksheet must be available

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- “listenability” level for both qualitative (Qualitative Measures Rubric for Listening Stimuli) and quantitative (Easy Listening Formula - ELF) measures. Audio stimulus complexity analysis worksheet must be available
- subject matter tags for history/social studies and science/technical subjects
- stimulus type (text or audio)

Reading ELA/Literacy-Specific Considerations

Choosing Appropriate Reading Stimulus Materials

Item writers must select well-crafted literary and informational stimulus pieces with topics that appeal to students’ interests and that are appropriate for their grade level. While students may have some prior knowledge of topics that appeal to them, care should be taken to choose little-known information about topics of common interest since the goal is not to assess student’s prior knowledge. When choosing informational texts of interest to students at a specific grade level, strongly consider finding stimulus pieces that relate to science, social studies, history, or technology as prescribed in the Common Core State Standards. Topics appropriate for elementary students might include animals, famous people and events in history, robots, and astronomy. These same topics may be appropriate for middle school students, but the topics should be addressed with greater complexity. High school students’ interests vary but may include the previous topics as well as careers, philosophy, the Constitution, and current events. (These example topics are not meant to constrain or limit other topic considerations.)

Reading stimuli included in Smarter Balanced ELA assessments support items that assess the full range of assessment targets. Trained reviewers analyze and map texts to ensure that they align to the standards and are rich and complex enough to generate item sets that fulfill the precise assessment target coverage required in the overall test blueprint.

Accessibility Concerns Related to the Selection of Reading Stimulus Materials

Stimuli need to include topics pertinent to traditionally underrepresented students. Research shows that students from dominant groups fare well when they encounter topics with which they are not familiar; conversely, traditionally underrepresented students’ performance is often negatively affected by topics/context with which they are not familiar.



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Stimuli also need to bridge the gap of gender interest, or at least provide a balance between those of interest to or about males and those of interest to or about females. This balance should be considered from the beginning of the development cycle. In addition, item writers should become familiar with topics that are excluded from Smarter Balanced assessments and avoid stimuli that relate to them. These topics are included in the *Smarter Balanced Assessment Consortium Bias and Sensitivity Guidelines*.

Interest level, as important as it is, is second to the level of complexity and value set by the Common Core State Standards and the Smarter Balanced vision for students to graduate from high school with skills and knowledge that demonstrate college- and career-readiness.

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Literary Texts and Informational Texts

Texts for Claim 1 of the *Smarter Balanced Assessment Consortium Content Specifications for ELA* are divided into two parts: literary texts and informational texts. These texts are listed in the Common Core State Standards on pages 31 and 57. A more detailed list of text types that reflect the Common Core State Standards classifications appears in the chart below:

Literary Texts				Informational Texts		
Text Types	Grades 3–5	Grades 6–8	High School	Text Types	Grades 3–5	Grades 6–8 & High School
Stories	Includes children’s adventure stories, folktales, legends, fables, fantasy, realistic fiction, and myth	Includes the subgenres of adventure stories, historical fiction, science fiction, realistic fiction, parodies, and satire	Includes the subgenres of adventure stories, historical fiction, science fiction, realistic fiction, allegories parodies, satire, and graphic novels	Literary Nonfiction and Historical, Scientific, and Technical Texts	Includes biographies and autobiographies; books about history, social studies, science, and the arts; technical texts, including directions, forms, and information displayed in charts or maps; and digital sources on a range of topics	Includes the subgenres of exposition, argument, and functional text in the form of personal essays, speeches, opinion pieces, essays about art or literature, biographies, memoirs, journalism, and historical*, scientific, technical, or economic accounts (including digital sources) written for a broad audience
	Dramas	Includes staged dialogue and brief familiar scenes	Includes one-act and multi-act plays			
	Poetry	Includes the subgenres of narrative poems and free-verse poems	Includes the subgenres of narrative poems, lyrical poems, free-verse poems, and ballads			

*Grades 11-12: Examples may include the Declaration of Independence, the Preamble to the Constitution, the Bill of Rights, and Lincoln’s Second Inaugural Address

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Literary texts include stories, drama, and poetry; informational texts include literary nonfiction and a broad range of texts and topics. Literary nonfiction texts convey factual information that may or may not employ a narrative structure or personal perspective. Smarter Balanced considers literary nonfiction as informational texts; however, expert judgment must be used to evaluate each text considering the organization of structure and language features. In some cases, a literary nonfiction text will more rightfully belong with literary text if it contains the story structure of a fictional work and/or employs literary devices.

Passage Lengths

Passage-length specifications must be considered in any assessment. Because students have a limited amount of time to complete an assessment, expecting them to read and comprehend lengthy texts is unrealistic. The table below presents minimum and maximum word counts for texts to be used in Smarter Balanced items/tasks. Short texts contain 75% or less of the maximum number of words allowed in long texts.

GRADE	WORD COUNT RANGE (short text)	WORD COUNT RANGE (long text)
3	200-487	488-650
4	450-562	563-750
5	450-562	563-750
6	650-712	713-950
7	650-712	713-950
8	650-712	713-950
11	800-825	826-1100

Few passages meet the exact number of words in a chart. It is important to note that the maximum word counts are suitable for assessment situations, but they are not meant to be absolute.

Measures to Determine Text Complexity

The Common Core State Standards require students to read increasingly complex texts with greater independence and proficiency as they progress toward career- and college-readiness. The *Common Core State Standards Appendix A: Research Supporting Key Elements of the Standards* defines a three-part model for measuring text complexity: (1) quantitative evaluation of the text, (2) qualitative evaluation of the text, and (3) matching reader to text and task. For the purposes of this document, emphasis will be on the first two parts of this model.

Quantitative Measures

The traditional quantitative measures of text complexity, such as readability metrics and word count, should be used to identify appropriate text. However, the readability indices work best with continuous print-based texts. The time available for student reading or viewing during an assessment period limits the time a student may take to read and understand a stimulus. Therefore, most of the stimuli should be within the ranges indicated on the previous page.

Several readability indices are available, and each has its own advantages and disadvantages. The most readily available is the Flesch-Kincaid index, because it is the metric used in Microsoft Word and other computer word-processing programs. It provides counts of a number of passage attributes and averages for the number of sentences per paragraph, words per sentence, and characters per word. It also provides readability data: the number of passive sentences, the Flesch Reading Ease score, and the Flesch-Kincaid Grade Level for the passage. The latter is calculated using the number of syllables in the passage. Advantages of this index are that it is readily available, it is intended for texts suitable for grades three through adult, and it gives a quick estimate of the complexity level of a passage. One notable drawback to this formula is that it may underestimate the readability levels of informational passages because it does not account for specialized vocabulary. No other readability metrics are as readily available, as wide-ranging in their capacity to cross several grade levels, and as convenient as Flesch-Kincaid.

Lexiles are used to offer readabilities for whole texts from which shorter passages may be taken. Lexiles may be used as one part of the evidence to determine whether a passage is viable for the Smarter Balanced assessments. Lexile levels for Common Core State Standards grade bands (Appendix A) are shown in the following chart. These “new” Lexiles meet the levels of complexity needed to meet the Common Core State Standards and Smarter Balanced guidelines for career- and college-readiness.

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Grade	“Stretch” Lexile Band
3	420–820
4–5	740–1010
6–8	925–1185
9–10	1050–1335
11	1185–1385

Supplemental Information for Appendix A of the Common Core State Standards for English Language Arts and Literacy: New Research on Text Complexity, NGA and CCSSO, 2012. (<http://www.corestandards.org/wp-content/uploads/Appendix-A-New-Research-on-Text-Complexity-revised.pdf>)

It is the expectation that passage writers or finders take into consideration both quantitative measures and select texts that cover a range of difficulty within each grade-level.

Qualitative Measures

Qualitative measures of text complexity have been described in the *Common Core State Standards Appendix A: Research Supporting Key Elements of the Standards* as “best measured or only measurable by an attentive human reader, such as levels of meaning or purpose; structure; language conventionality and clarity; and knowledge demands.”

Smarter Balanced readabilities for Claim 1 Reading literary and informational passages are expected to be on a Common Core State Standards grade-band level for all Claim 1 items. However, complex narrative fiction can pose a challenge for all readability indices. One notable example is John Steinbeck’s novel *The Grapes of Wrath*. Because Steinbeck uses more simple words to express complex ideas, both Flesch-Kincaid and Lexiles have rated it appropriate for grades 2–3. Although younger students may be able to read the words, they will not truly understand the complex ideas in the text.

In addition, it is not possible to produce an accurate readability estimate for some types of passages (e.g., poems or passages with a great deal of dialogue). Because no readability formula is perfect, qualitative measures and teacher content review committees should provide expert opinions on grade-level appropriateness for passages used in the Smarter Balanced assessments.

Rubrics appended to this document provide the qualitative measures for literary and informational text stimuli. These rubrics are followed by two sample texts that appear in the *Common Core State Standards Appendix B: Text Exemplars and Sample Performance Task* and text complexity analysis worksheets for these sample texts. **As indicated on these worksheets, the quantitative measures suggest the appropriate grade band of the text while the qualitative rubrics pinpoint the specific grade level.** These rubrics provide a powerful and comprehensive way of evaluating a range of

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stimulus materials that cover the literary and informational scope outlined in the Common Core State Standards.

Texts selected for the Smarter Balanced Assessment must include evidence of their complexity determination and grade-level placement, based on both quantitative and qualitative measures as specified above. Thus the expectation is that every text selected will have a Text Complexity Analysis Worksheet (see *Appendices A and B* in this document for a sample) to support its placement at a grade level.

Measures to Determine Audio Stimulus Complexity

Quantitative Measures

The quantitative measure used to analyze the “listenability” of audio stimuli on the Smarter Balanced Assessments is the Easy Listening Formula (ELF). ELF is designed to determine “listenability” and is often used for radio and television broadcasts. The ELF program analyzes the density of complex words instead of sentence length. It uses the ratio of syllables to sentences. The ELF score is calculated by counting the number of syllables (above one) for each word.

Qualitative Measures

The Qualitative Measures Rubric for Listening Stimuli, appended to this document in Appendix C, provides the qualitative measures for Listening stimuli. This rubric is followed by a sample stimulus and an audio stimulus complexity analysis worksheet for the sample stimulus. As indicated on the worksheet, the quantitative measures suggest the appropriate grade band of the stimulus while the qualitative rubric pinpoints the specific grade level. The rubric provides a comprehensive measure for evaluating a range of stimulus materials that cover the Claim 3 Listening targets.

Audio stimuli selected for the Smarter Balanced Assessment must include evidence of their complexity determination and grade-level placement, based on both quantitative and qualitative measures as specified above. Thus the expectation is that every audio stimulus selected will have an Audio Stimulus Complexity Analysis Worksheet (see *Appendix C* in this document for a sample) to support its placement at a grade level.

Conclusion

The Smarter Balanced assessments that have been developed to measure student achievement in relation to the Common Core State Standards are ambitious and innovative in scope. They emphasize the creation of a new style of assessment that engages and challenges students. These specifications for stimulus materials have been designed to foster creativity and the innovative assessment that the Smarter Balanced states have envisioned.

Appendix A: Reading Literary Stimuli

1. Qualitative Measures Rubric for Literary Texts
2. Sample Annotated Literary Text: *Where the Mountain Meets the Moon*, by Grace Lin, New York: Little, Brown, 2009.
3. Sample Worksheet: Literary Text Complexity Analysis of *Where the Mountain Meets the Moon* by Grace Lin

The sample text has been evaluated based on both quantitative and qualitative measures as illustrated on the following pages. The sample annotated text is followed by a text analysis worksheet that uses the quantitative measures to suggest the appropriate grade band of the text and the qualitative rubrics to pinpoint the specific grade level.

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Text Complexity: Qualitative Measures Rubric

Reading Literary Texts

The ELA State Collaborative on Assessment and Student Standards (SCASS) developed the following qualitative measures rubric for literary texts. The rubric examines the following criteria judged as central to students' successful comprehension of text: meaning, text structure, language features, and knowledge demands. Each of these categories is ranked based on descriptors associated with the following levels: slightly complex, moderately complex, very complex, and exceedingly complex.

Qualitative Measures Rubric for Literary Texts				
Features	Exceedingly Complex	Very Complex	Moderately Complex	Slightly Complex
Meaning	<ul style="list-style-type: none"> • Meaning: Several levels and competing elements of meaning that are difficult to identify, separate, and interpret; theme is implicit or subtle, often ambiguous and revealed over the entirety of the text 	<ul style="list-style-type: none"> • Meaning: Several levels of meaning that may be difficult to identify or separate; theme is implicit or subtle and may be revealed over the entirety of the text 	<ul style="list-style-type: none"> • Meaning: More than one level of meaning with levels clearly distinguished from each other; theme is clear but may be conveyed with some subtlety 	<ul style="list-style-type: none"> • Meaning: One level of meaning; theme is obvious and revealed early in the text.
	<ul style="list-style-type: none"> • Organization: Organization is intricate with regard to elements such as narrative viewpoint, time shifts, multiple characters, storylines, and detail 	<ul style="list-style-type: none"> • Organization: Organization may include subplots, time shifts, and more complex characters 	<ul style="list-style-type: none"> • Organization: Organization may have two or more storylines and is occasionally difficult to predict 	<ul style="list-style-type: none"> • Organization: Organization of text is clear, chronological, or easy to predict
Text Structure	<ul style="list-style-type: none"> • Use of Images: If used, minimal illustrations that support the text 	<ul style="list-style-type: none"> • Use of Images: If used, a few illustrations that support the text 	<ul style="list-style-type: none"> • Use of Images: If used, a range of illustrations that support selected parts of the text 	<ul style="list-style-type: none"> • Use of Images: If used, extensive illustrations that directly support and assist in interpreting the written text

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Qualitative Measures Rubric for Literary Texts				
Features	Exceedingly Complex	Very Complex	Moderately Complex	Slightly Complex
Language Features	<ul style="list-style-type: none"> Conventionality: Dense and complex; contains abstract, ironic, and/or figurative language 	<ul style="list-style-type: none"> Conventionality: Complex; contains some abstract, ironic, and/or figurative language 	<ul style="list-style-type: none"> Conventionality: Largely explicit and easy to understand, with some occasions for more complex meaning 	<ul style="list-style-type: none"> Conventionality: Explicit, literal, straightforward, easy to understand
	<ul style="list-style-type: none"> Vocabulary: Generally unfamiliar, archaic, subject-specific, or overly academic language; may be ambiguous or purposefully misleading 	<ul style="list-style-type: none"> Vocabulary: Somewhat complex language that is sometimes unfamiliar, archaic, subject-specific, or overly academic 	<ul style="list-style-type: none"> Vocabulary: Mostly contemporary, familiar, conversational; rarely unfamiliar or overly academic 	<ul style="list-style-type: none"> Vocabulary: Contemporary, familiar, conversational language
	<ul style="list-style-type: none"> Sentence Structure: Mainly complex sentences, often containing multiple concepts 	<ul style="list-style-type: none"> Sentence Structure: Many complex sentences with several subordinate phrases or clauses and transition words 	<ul style="list-style-type: none"> Sentence Structure: Simple and compound sentences, with some more complex constructions 	<ul style="list-style-type: none"> Sentence Structure: Mainly simple sentences
Knowledge Demands	<ul style="list-style-type: none"> Life Experiences: Explores complex, sophisticated themes; experiences are distinctly different from the common reader 	<ul style="list-style-type: none"> Life Experiences: Explores themes of varying levels of complexity; experiences portrayed are uncommon to most readers 	<ul style="list-style-type: none"> Life Experiences: Explores a single theme; experiences portrayed are common to many readers 	<ul style="list-style-type: none"> Life Experiences: Explores a single theme; experiences portrayed are everyday and common to most readers
	<ul style="list-style-type: none"> Intertextuality and Cultural Knowledge: Many references or allusions to other texts or cultural elements 	<ul style="list-style-type: none"> Intertextuality and Cultural Knowledge: Some references or allusions to other texts or cultural elements 	<ul style="list-style-type: none"> Intertextuality and Cultural Knowledge: A few references or allusions to other texts or cultural elements 	<ul style="list-style-type: none"> Intertextuality and Cultural Knowledge: No references or allusions to other texts or cultural elements

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Sample Annotated Literary Text

Where the Mountain Meets the Moon, by Grace Lin. (Common Core State Standards, Appendix B, p. 66). From Chapter 1.

Lexile: 1030; Flesch-Kincaid: 7.6; word count 283

Far away from here, following the Jade River,

There was once a black mountain that cut into the sky like a jagged piece of rough metal. The villagers called it Fruitless Mountain because nothing grew on it and birds and animals did not rest there.

Crowded in the corner of where Fruitless Mountain and the Jade River met was a village that was a shade of faded brown. This was because the land around the village was hard and poor. To coax rice out of the stubborn land, the field had to be flooded with water. The villagers had to tramp in the mud, bending and stooping and planting day after day. Working in the mud so much made it spread everywhere and the hot sun dried it onto their clothes and hair and homes. Over time, everything in the village had become the dull color of dried mud.

One of the houses in this village was so small that its wood boards, held together by the roof, made one think of a bunch of matches tied with a piece of twine. Inside, there was barely enough room for three people to sit around the table—which was lucky because only three people lived there. One of them was a young girl called Minli.

Minli was not brown and dull like the rest of the village. She had glossy black hair with pink cheeks, shining eyes always eager for adventure, and a fast smile that flashed from her face. When people saw her lively and impulsive spirit, they thought her name, which meant quick thinking, suited her well. “Too well,” her mother sighed, as Minli had a habit of quick acting as well.

Knowledge Demands

The setting in China and the references to rice planting may be unfamiliar.

Language Features

The language is mostly basic with a few challenging words, such as “coax” and “impulsive,” and some figurative language.

The sentences are lengthy with embedded clauses.

Text Structure and Meaning

The narrative is in a clear chronological order.

The meaning is implied, but it can be inferred from the description of the dull countryside at the beginning of this excerpt, which is sharply contrasted to the bright description of the main character in the last paragraph.

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Sample Literary Text Complexity Analysis Worksheet

Worksheet: Literary Text Complexity Analysis		
Title	Author	Text Description
Where the Mountain Meets the Moon	Lin Grace	Literary text excerpt set in a village in China (283 word count, permissioned text)



Recommended Placement for Assessment: Grade 5

The quantitative Lexile and Flesch-Kincaid measures suggest an appropriate placement at the upper grades 4–5 band or early grades 6–8 band. The Common Core State Standards Appendix B (page 66) places this text in the grades 4-5 band level. The qualitative review supports grade 5. **Based on these sets of measures, this passage is of medium complexity and is recommended for assessment at grade 5.**

Qualitative Measures	Quantitative Measures												
<p>MEANING <u>Moderately complex</u>: The purpose is implied, but can be inferred from the bleak descriptions of the village and the contrast with Minli.</p> <p>TEXT STRUCTURE Organization: <u>Slightly complex</u>: The narrative is chronological with no text features. Use of Images: n/a</p> <p>LANGUAGE FEATURES Conventionality: <u>Slightly complex</u>: The text includes some figurative language. Vocabulary: <u>Slightly complex</u>: The vocabulary is mostly basic with only a couple of challenging words (coax, impulsive). Sentence Structure: <u>Moderately complex</u>: Sentences are lengthy, with embedded clauses.</p> <p>KNOWLEDGE DEMANDS Life Experiences: <u>Slightly complex</u>: Life experience in the passage may be common. Intertextuality and Cultural Knowledge: <u>Moderately complex</u>: The setting in China and references to rice planting may be unfamiliar.</p>	<p>Common Core State Standards Appendix A Complexity Band Level (if applicable): Grades 4–5</p> <p>Lexile or Other Quantitative Measure of the Text: Lexile: 990; upper grades 4-5 or early grades 6-8 Flesch-Kincaid: 5.8</p> <div style="background-color: #4a86e8; color: white; text-align: center; padding: 5px; font-weight: bold;"> Considerations for Passage Selection </div> <p>Passage selection should be based on the ELA Content Specifications targets and the cognitive demands of the assessment tasks.</p> <p>Potential Challenges This Text May Pose (check all that apply):</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td style="width: 30px;"></td> <td>Accessibility</td> </tr> <tr> <td style="text-align: center;">X</td> <td>Sentence and text structures</td> </tr> <tr> <td></td> <td>Archaic language, slang, idioms, or other language challenges</td> </tr> <tr> <td style="text-align: center;">X</td> <td>Background knowledge</td> </tr> <tr> <td style="text-align: center;">X</td> <td>Bias and sensitivity issues</td> </tr> <tr> <td></td> <td>Word count</td> </tr> </tbody> </table>		Accessibility	X	Sentence and text structures		Archaic language, slang, idioms, or other language challenges	X	Background knowledge	X	Bias and sensitivity issues		Word count
	Accessibility												
X	Sentence and text structures												
	Archaic language, slang, idioms, or other language challenges												
X	Background knowledge												
X	Bias and sensitivity issues												
	Word count												



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Adapted from the 2012 ELA SCASS work

Appendix B: Reading Informational Stimuli

1. Qualitative Measures Rubric for Informational Texts
2. Sample Annotated Informational Text: *Narrative of the Life of Frederick Douglass, an American Slave, Written by Himself* by Frederick Douglass, Boston: Anti-Slavery Office, 1845
3. Sample Worksheet: Informational Text Complexity Analysis of *Narrative of the Life of Frederick Douglass, an American Slave, Written by Himself* by Frederick Douglass

The sample text has been evaluated based on both quantitative and qualitative measures as illustrated on the following pages. The sample annotated text is followed by a text analysis worksheet that uses the two quantitative measures to suggest the appropriate grade band of the text and the qualitative rubrics to pinpoint the specific grade level.



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Text Complexity: Qualitative Measures Rubric

Reading Informational Texts

The ELA State Collaborative on Assessment and Student Standards (SCASS) developed the following qualitative measures rubric for informational texts. The rubric examines the following criteria judged as central to students' successful comprehension of text purpose, text structure, language features, and knowledge demands. Each of these categories is ranked based on descriptors associated with the following levels: slightly complex, moderately complex, very complex, and exceedingly complex.

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Qualitative Measures Rubric for Informational Texts				
Features	Exceedingly Complex	Very Complex	Moderately Complex	Slightly Complex
Purpose	<ul style="list-style-type: none"> • Purpose: Subtle, implied, difficult to determine; intricate, theoretical elements 	<ul style="list-style-type: none"> • Purpose: Implied, but fairly easy to infer; more theoretical than concrete 	<ul style="list-style-type: none"> • Purpose: Implied, but easy to identify based upon context or source 	<ul style="list-style-type: none"> • Purpose: Explicitly stated; clear, concrete with a narrow focus
Text Structure	<ul style="list-style-type: none"> • Organization of Main Ideas: Connections between an extensive range of ideas or events are deep, intricate, and often implicit or subtle; organization of the text is intricate or specialized for a particular discipline 	<ul style="list-style-type: none"> • Organization of Main Ideas: Connections between an expanded range of ideas, processes, or events are deeper and often implicit or subtle; organization may contain multiple pathways and may exhibit traits common to a specific discipline 	<ul style="list-style-type: none"> • Organization of Main Ideas: Connections between some ideas or events are implicit or subtle; organization is evident and generally sequential 	<ul style="list-style-type: none"> • Organization of Main Ideas: Connections between ideas, processes, or events are explicit and clear; organization of text is clear or chronological or easy to predict
	<ul style="list-style-type: none"> • Text Features: If used, are essential in understanding content 	<ul style="list-style-type: none"> • Text Features: If used, greatly enhance the reader's understanding of content 	<ul style="list-style-type: none"> • Text Features: If used, enhance the reader's understanding of content 	<ul style="list-style-type: none"> • Text Features: If used, help the reader navigate and understand content but are not essential
	<ul style="list-style-type: none"> • Use of Images: If used, extensive, intricate, essential integrated images, tables, charts, etc., necessary to make meaning of text; also may provide information not otherwise conveyed in the text 	<ul style="list-style-type: none"> • Use of Images: If used, essential integrated images, tables, charts, etc., may occasionally be essential to understanding the text 	<ul style="list-style-type: none"> • Use of Images: If used, images mostly supplementary to understanding of the text, such as indexes and glossaries; graphs, pictures, tables, and charts directly support the text 	<ul style="list-style-type: none"> • Use of Images: If used, simple images, unnecessary to understanding the text but directly support and assist in interpreting the written text

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Qualitative Measures Rubric for Informational Texts				
Features	Exceedingly Complex	Very Complex	Moderately Complex	Slightly Complex
Language Features	<ul style="list-style-type: none"> • Conventionality: Dense and complex; contains abstract, ironic, and/or figurative language 	<ul style="list-style-type: none"> • Conventionality: Complex; contains some abstract, ironic, and/or figurative language 	<ul style="list-style-type: none"> • Conventionality: Largely explicit and easy to understand with some occasions for more complex meaning 	<ul style="list-style-type: none"> • Conventionality: Explicit, literal, straightforward, easy to understand
	<ul style="list-style-type: none"> • Vocabulary: Generally unfamiliar, archaic, subject-specific, or overly academic language; may be ambiguous or purposefully misleading 	<ul style="list-style-type: none"> • Vocabulary: Somewhat complex language that is sometimes unfamiliar, archaic, subject-specific, or overly academic 	<ul style="list-style-type: none"> • Vocabulary: Mostly contemporary, familiar, conversational; rarely unfamiliar or overly academic 	<ul style="list-style-type: none"> • Vocabulary: Contemporary, familiar, conversational language
	<ul style="list-style-type: none"> • Sentence Structure: Mainly complex sentences, often containing multiple concepts 	<ul style="list-style-type: none"> • Sentence Structure: Many complex sentences with several subordinate phrases or clauses and transition words 	<ul style="list-style-type: none"> • Sentence Structure: Simple and compound sentences, with some more complex constructions 	<ul style="list-style-type: none"> • Sentence Structure: Mainly simple sentences
Knowledge Demands	<ul style="list-style-type: none"> • Subject Matter Knowledge: Extensive, perhaps specialized or even theoretical discipline-specific content knowledge; range of challenging abstract and theoretical concepts 	<ul style="list-style-type: none"> • Subject Matter Knowledge: Moderate levels of discipline-specific content knowledge; some theoretical knowledge may enhance understanding; range of recognizable ideas and challenging abstract concepts 	<ul style="list-style-type: none"> • Subject Matter Knowledge: Everyday practical knowledge and some discipline-specific content knowledge; both simple and more complicated, abstract ideas 	<ul style="list-style-type: none"> • Subject Matter Knowledge: Everyday, practical knowledge; simple, concrete ideas
	<ul style="list-style-type: none"> • Intertextuality: Many references or allusions to other texts or outside ideas, theories, etc. 	<ul style="list-style-type: none"> • Intertextuality: Some references or allusions to other texts or outside ideas, theories, etc. 	<ul style="list-style-type: none"> • Intertextuality: A few references or allusions to other texts or outside ideas, theories, etc. 	<ul style="list-style-type: none"> • Intertextuality: No references or allusions to other texts, or outside ideas, theories, etc.

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Sample Annotated Informational Text

Narrative of the Life of Frederick Douglass, an American Slave, by Frederick Douglass.
(Common Core State Standards, Appendix B, p. 71)
Lexile: 1030; Flesch-Kincaid: 7.6; word count 944

The plan which I adopted, and the one by which I was most successful, was that of making friends of all the little white boys whom I met in the street. As many of these as I could, I converted into teachers. With their kindly aid, obtained at different times and in different places, I finally succeeded in learning to read. When I was sent on errands, I always took my book with me, and by going one part of my errand quickly, I found time to get a lesson before my return. I used also to carry bread with me, enough of which was always in the house, and to which I was always welcome; for I was much better off in this regard than many of the poor white children in our neighborhood. This bread I used to bestow upon the hungry little urchins, who, in return, would give me that more valuable bread of knowledge. I am strongly tempted to give the names of two or three of those little boys, as a testimonial of the gratitude and affection I bear them; but prudence forbids;-not that it would injure me, but it might embarrass them; for it is almost an unpardonable offence to teach slaves to read in this Christian country. It is enough to say of the dear little fellows, that they lived on Philpot Street, very near Durgin and Bailey's ship-yard. I used to talk this matter of slavery over with them. I would sometimes say to them, I wished I could be as free as they would be when they got to be men. "You will be free as soon as you are twenty-one, but I am a slave for life! Have not I as good a right to be free as you have?" These words used to be trouble them; they would express for me the liveliest sympathy, and console me with the hope that something would occur by which I might be free.

I was now about twelve years old, and the thought of being a slave for life began to bear heavily upon my heart. Just about this time, I got hold of a book entitled "The Columbian Orator." Every opportunity I got, I used to read this book. Among much of other interesting matter, I found in it a dialogue between a master and his slave. The slave was represented as having run away from his master three times. The dialogue represented the conversation which took place between them, when the slave was retaken the third time. In this dialogue, the whole argument in behalf of slavery was brought forward by the master, all of which was disposed of by the slave. The slave was made to say some very smart as well as impressive things in reply to his master -- things which had the desired though unexpected effect;

Language Conventuality and Clarity

Both long and short sentences with embedded clauses; wording is more formal than conversational.

Rich vocabulary: "testimonial," "bestow," "prudence," "disposed," "orator," "emancipation."

"Bread" used as an analogy.

Knowledge Demands

Need understanding of time period of 1845 and what was happening in the U.S.

Perspective is first-person, narrated by a former slave.

Reference to "The Columbian Orator," a 19th c. schoolbook written to "improve youth ... in the useful art of eloquence.

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for the conversation resulted in the voluntary emancipation of the slave on the part of the master.

Structure and Levels of Meaning

P. 1 is a chronological account of how Douglass learned to read.

P. 2 relates a growing awareness of the burden of slavery through the re

want of utterance. The moral which I gained from the dialogue was the power of truth over the conscience of even a slaveholder. What I got from Sheridan was a bold denunciation of slavery, and a powerful vindication of human rights. The reading of these documents enabled me to utter my thoughts, and to meet the arguments brought forward to sustain slavery; but while they relieved me of one difficulty, they brought on another even more painful than the one of which I was relieved. The more I read, the more I was led to abhor and detest my enslavers. I could regard them in no other light than a band of successful robbers, who had left their homes, and gone to Africa, and stolen us from our homes, and in a strange land reduced us to slavery. I loathed them as being the meanest as well as the most wicked of men. As I read and contemplated the subject, behold! That very discontentment which Master Hugh had predicted would follow my learning to read had already come, to torment and sting my soul to unutterable anguish. As I writhed under it, I would at times feel that learning to read had been a curse rather than a blessing. It had given me a view of my wretched condition, without the remedy. It opened my eyes to the horrible pit, but to no ladder upon which to get out. In moments of agony, I envied my fellow-slaves for their stupidity. I have often wished myself a beast. I preferred the condition of the meanest reptile to my own. Anything, no matter what, to get rid of thinking! It was this everlasting thinking of my condition that tormented me. There was no getting rid of it. It was pressed upon me by every object within sight or hearing, animate or inanimate. The silver trump of freedom had roused my soul to eternal wakefulness. Freedom now appeared, to disappear no more forever. It was heard in every sound, and seen in everything. It was ever present to torment me with a sense of my wretched condition. I saw nothing without seeing it, I heard nothing without hearing it, and felt nothing without feeling it. It looked from every star, it smiled in every calm, breathed in every wind, and moved in every storm.

Knowledge Demands

Reference to (Lewis) Sheridan, who was an abolitionist

Language Tier 2 Words:

choice master
tongue meanest

Language:

denunciation abhor
vindication *loathe*
discontentment
unutterable detest

Levels of Meaning:

Douglass shifts from an account of learning to read, to the knowledge that reading brought him, to reflecting on how the awareness of his situation tormented him with injustice.

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Sample Informational Text Complexity Analysis Worksheet

Worksheet: Informational Text Complexity Analysis		
Title	Author	Text Description
The Life of Frederick Douglass	Frederick Douglass	Informational literary nonfiction text excerpt from the classic autobiography (944 word count, public domain)



Recommended Placement for Assessment: Grade 9

The quantitative Lexile and Flesch-Kincaid measures suggest an appropriate placement between grades 6-8. The Common Core State Standards Appendix B (page 71) places this text in the grades 6-8 band level. The qualitative review, however, identifies this text as very complex. **Based on these sets of measures, this passage is of high complexity and is recommended for assessment at grade 9.**

Qualitative Measures	Quantitative Measures												
<p>PURPOSE <u>Very complex</u>: The purpose is implied, but can be inferred from the title and from very early on in the passage.</p> <p>TEXT STRUCTURE Organization of Main Ideas: <u>Very complex</u>: The narrative shifts between historical account and his reflections on the lessons of his early life, as well as how it later affected him. The perspective is first-person, told by a former slave. Text Features: n/a Use of Images: n/a</p> <p>LANGUAGE FEATURES Conventionality: <u>Very complex</u>: Includes both concrete and abstract or figurative language. The language overall is formal and will sometimes be unfamiliar. Vocabulary: <u>Very complex</u>: There are instances of more challenging vocabulary (testimonial, bestow, prudence, disposed, orator, emancipation). Sentence Structure: <u>Very complex</u>: Sentences are both short and long with embedded clauses.</p> <p>KNOWLEDGE DEMANDS Subject Matter Knowledge: <u>Very complex</u>: Some references with which students may not be familiar (Lewis Sheridan, the Columbian Orator).</p>	<p>Common Core State Standards Appendix A Complexity Band Level (if applicable): Grades 6-8</p> <p>Lexile or Other Quantitative Measure of the Text: Lexile: 1030; grades 6-8 Flesch-Kincaid: 7.6</p> <div style="background-color: #4a7ebb; color: white; text-align: center; padding: 5px; font-weight: bold;">Considerations for Passage Selection</div> <p>Passage selection should be based on the ELA Content Specifications targets and the cognitive demands of the assessment tasks.</p> <p>Potential Challenges This Text May Pose (check all that apply):</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30px;"></td><td>Accessibility</td></tr> <tr><td style="text-align: center;">X</td><td>Sentence and text structures</td></tr> <tr><td style="text-align: center;">X</td><td>Archaic language, slang, idioms, or other language challenges</td></tr> <tr><td style="text-align: center;">X</td><td>Background knowledge</td></tr> <tr><td></td><td>Bias and sensitivity issues</td></tr> <tr><td></td><td>Word count</td></tr> </table>		Accessibility	X	Sentence and text structures	X	Archaic language, slang, idioms, or other language challenges	X	Background knowledge		Bias and sensitivity issues		Word count
	Accessibility												
X	Sentence and text structures												
X	Archaic language, slang, idioms, or other language challenges												
X	Background knowledge												
	Bias and sensitivity issues												
	Word count												

Intertextuality: Very complex: Students with knowledge of the time period and US history of slavery will find the text more accessible than those without it.

Adapted from the 2012 ELA SCASS work

Appendix C: Listening Stimuli

1. Qualitative Measures Rubric for Listening Stimuli
2. Sample Audio Stimulus: “Defining Sports”
3. Sample Worksheet: Audio Stimulus Complexity Analysis of “Defining Sports”

The sample audio stimulus has been evaluated based on both quantitative and qualitative measures as illustrated on the following pages. The sample stimulus is followed by an audio stimulus complexity analysis worksheet that uses the quantitative measure, Easy Listening Formula (ELF), and the qualitative rubric to determine the appropriate grade placement for the stimulus.

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Audio Complexity: Qualitative Measures Rubric

Listening Stimuli

The Smarter Balanced Assessment Consortium developed the following qualitative measures rubric for listening stimuli. The rubric examines the following criteria judged as central to students' successful comprehension of audio stimulus: purpose, auditory structure, oral language features, and knowledge demands. Each of these categories is ranked based on descriptors associated with the following levels: low complexity, medium complexity, and high complexity.

Qualitative Measures Rubric for Listening Stimuli			
Features	Low Complexity	Medium Complexity	High Complexity
Purpose	<ul style="list-style-type: none"> • Purpose: Explicitly stated; clear, concrete with a narrow focus 	<ul style="list-style-type: none"> • Purpose: Implied, but fairly easy to infer; more theoretical than concrete 	<ul style="list-style-type: none"> • Purpose: Subtle, implied, theoretical elements
	<ul style="list-style-type: none"> • Audience: Speaker's approach is straightforward and transparent 	<ul style="list-style-type: none"> • Audience: Speaker's approach is somewhat layered and may include elements intended to persuade or influence audience 	<ul style="list-style-type: none"> • Audience: Speaker may include a variety of persuasive techniques; speaker may direct the message to multiple audiences, and the listener must decipher the meaning on more than one level
	<ul style="list-style-type: none"> • Presentation: A single speaker presents the information 	<ul style="list-style-type: none"> • Presentation: Two or more speakers interact. Their patterns of communication may influence the meaning and flow of information 	<ul style="list-style-type: none"> • Presentation: Two or more speakers interact. The juxtaposition of the speakers may reveal a contrast or otherwise influence the meaning

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Qualitative Measures Rubric for Listening Stimuli			
Features	Low Complexity	Medium Complexity	High Complexity
Auditory Structure	<ul style="list-style-type: none"> • Organization of Audio Text: Connections between ideas, processes or events are explicit and clear; organization of text is clear or chronological or easy to predict. 	<ul style="list-style-type: none"> • Organization of Audio Text: Connections between some ideas or events are implicit or subtle; organization is evident and generally sequential 	<ul style="list-style-type: none"> • Organization of Audio Text: Connections between a range of ideas, processes or events are deeper and often implicit or subtle; organization may exhibit traits common to a specific discipline; organization may be different from chronological or sequentially (i.e., cause/effect, problem/solution, compare/contrast)
	<ul style="list-style-type: none"> • Sound Variety: Sound is distinct and approach is direct 	<ul style="list-style-type: none"> • Sound Variety: Sound is somewhat layered. Overlapping voices or sounds require listener to integrate sounds for fullest understanding 	<ul style="list-style-type: none"> • Sound Variety: Sound is multi-layered. Overlapping voices, music, or sounds provide context that listener needs to process (such as foreground noise, background noise, or music)
Oral Language Features	<ul style="list-style-type: none"> • Conventionality: Explicit, literal, straightforward, easy to understand 	<ul style="list-style-type: none"> • Conventionality: Largely explicit and easy to understand with some occasions for more complex meaning 	<ul style="list-style-type: none"> • Conventionality: Complex; contains some specialized abstract, ironic, and/or figurative language
	<ul style="list-style-type: none"> • Vocabulary: Contemporary, familiar, conversational language 	<ul style="list-style-type: none"> • Vocabulary: Mostly contemporary, familiar, conversational; rarely unfamiliar or academic 	<ul style="list-style-type: none"> • Vocabulary: Complex language that is sometimes unfamiliar, archaic, subject-specific, or academic
	<ul style="list-style-type: none"> • Delivery: Mainly direct, with simple declarative sentences 	<ul style="list-style-type: none"> • Delivery: Somewhat variable—at times, speaker changes pitch and volume to create emphasis 	<ul style="list-style-type: none"> • Delivery: Varied. Shifts in tone may be subtle and complex, requiring interpretation

**Smarter Balanced
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Qualitative Measures Rubric for Listening Stimuli			
Features	• Low Complexity	• Medium Complexity	• High Complexity
Knowledge Demands	<ul style="list-style-type: none"> • Subject Matter Knowledge: Everyday, practical knowledge; simple, concrete ideas 	<ul style="list-style-type: none"> • Subject Matter Knowledge: Everyday practical knowledge and some discipline-specific content knowledge; both simple and more complicated, abstract ideas; knowledge of speaker may affect interpretation of content 	<ul style="list-style-type: none"> • Subject Matter Knowledge: Discipline-specific content knowledge; some theoretical knowledge may enhance understanding; range of recognizable ideas and challenging abstract concepts; knowledge of speaker or source affects interpretation of content
	<ul style="list-style-type: none"> • Allusions/References: No references or allusions to other texts, or outside ideas, theories, etc. 	<ul style="list-style-type: none"> • Allusions/References: Some references or allusions to other texts or outside ideas, theories, etc. 	<ul style="list-style-type: none"> • Allusions/References: Many references or allusions to other texts or outside ideas, theories, etc.
	<ul style="list-style-type: none"> • Use of Images: a range of images that help student understanding 	<ul style="list-style-type: none"> • Use of images: minimal use of images that help student understanding 	<ul style="list-style-type: none"> • Use of images: no use of images that help student understanding

Sample Listening Stimulus

“Defining Sports”

Easy Listening Formula (ELF): 11.0; word count: 182

Listen to the presentation. Then answer the questions.

Audio Transcript:

In the following presentation you will hear a speaker discuss a debate in sports.

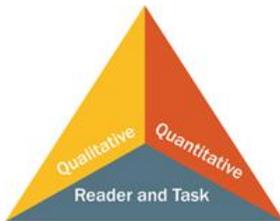
For years, sports enthusiasts have debated what activities can be called sports. Supporters of limiting the use of the word “sport” claim that to be a sport an activity must be measured quantitatively. For example, they consider soccer a sport because the winner is determined by the number of goals scored. In contrast, they do not classify figure skating as a sport since judges give scores based on personal evaluation. Therein lies a contradiction, however. One cannot call skiing a sport when it involves a timed downhill race, and then call it something else in a competition of aerial tricks. Moreover, golf depends upon the quantitative measurement of strokes to determine a winner. However, the people in favor of limiting what activities can be called sports do not consider golf a sport.

Maybe the term “sport” should be defined as any activity that is based on competition, thereby eliminating restrictions based on the method with which winners are determined. Without the competition, it’s just a display of physical talent. The heart of sports, after all, is the fight to be the best.

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Sample Audio Stimulus Complexity Analysis Worksheet

Worksheet: Audio Stimulus Complexity Analysis		
Title	Author	Description
Defining Sports	Cheryl Bradley	Informational stimulus (182 word count, commissioned)



Recommended Placement for Assessment: Grade 11

The quantitative ELF measures suggest an appropriate placement at grade 11. **Based on this set of measures, this audio stimulus is recommended for assessment at grade 11.**

Qualitative Measures	Quantitative Measures										
<p>PURPOSE Purpose: <u>Medium complexity</u>: Implied, but fairly easy to infer; more theoretical than concrete Audience: <u>Medium complexity</u>: Speaker’s approach is somewhat layered and may include elements intended to persuade or influence audience Presentation: <u>Low complexity</u>: A single speaker presents the information</p> <p>AUDITORY STRUCTURE Organization of Audio Text: <u>Low complexity</u>: Connection between ideas is clear; sequence is linear; starts at beginning and proceeds to end Sound Variety: audio not available at this time</p> <p>ORAL LANGUAGE FEATURES Conventionality: <u>Medium complexity</u>: Largely explicit and easy to understand with some occasions for more complex meaning Vocabulary: <u>Medium complexity</u>: Mostly contemporary, familiar, conversational; rarely unfamiliar or academic Delivery: audio not available at this time</p> <p>KNOWLEDGE DEMANDS Subject Matter Knowledge: <u>Medium complexity</u>: Everyday practical knowledge and some discipline-specific content knowledge; both simple and more complicated, abstract ideas; Knowledge of speaker may affect interpretation of content</p>	<p>Easy Listening Formula (ELF) or Other Quantitative Measure of the Text: ELF: 11.0</p> <div style="background-color: #4a7ebb; color: white; text-align: center; padding: 5px; margin: 10px 0;">Considerations for Audio Stimulus Selection</div> <p>Stimulus selection should be based on the ELA Content Specifications targets and the cognitive demands of the assessment tasks.</p> <p>Potential Challenges This Stimulus May Pose (check all that apply):</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr><td style="width: 40px;"></td><td>Accessibility</td></tr> <tr><td></td><td>Sentence and text structures</td></tr> <tr><td></td><td>Archaic language, slang, idioms, or other language challenges</td></tr> <tr><td></td><td>Background knowledge</td></tr> <tr><td></td><td>Bias and sensitivity issues</td></tr> </tbody> </table>		Accessibility		Sentence and text structures		Archaic language, slang, idioms, or other language challenges		Background knowledge		Bias and sensitivity issues
	Accessibility										
	Sentence and text structures										
	Archaic language, slang, idioms, or other language challenges										
	Background knowledge										
	Bias and sensitivity issues										

<p>Allusions/References: <u>Low complexity:</u> No references or allusions to other texts, or outside ideas, theories, etc.</p> <p>Use of Images: n/a</p>	
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Appendix D: Annotated CAT Sample Stimuli for Claim 2 (Writing) Items

The following samples are intended to provide a guide for item writers challenged with determining what appropriate stimulus “looks like” at various grade levels for Claim 2 (writing) Items. While no one set of guidelines or check list can capture all the nuances of grade-appropriate writing, we hope the following samples will help to illustrate the information in the stimulus specifications document.

<p>Grade 3, Target 1a–Organization</p> <p>A student is writing a story for his English class about being late for school one day. The student wants to revise the draft to improve the organization. Read the draft of the story and complete the task that follows.</p> <p><u>This morning, I woke up late. My alarm clock never went off!</u> The only reason I woke up at all was because I heard my dog barking. I walked down the hall to my mother's room to find she was still in bed. <u>“Mom! Wake up,”</u> I yelled. <u>“I think we both overslept.”</u> I looked over at the clock and it was 7:30 a.m. School starts in one hour—great!</p> <p>I jumped out of bed in a flash, and ran into the bathroom. There, I brushed my teeth, washed my face, and then looked in the mirror. <u>My hair was standing straight up!</u> I combed it down with water as fast as I could.</p> <p>After that, I threw on some clothes and shoes. Racing into the kitchen, I grabbed my backpack from the table and an apple from the fruit bowl. <u>“Bye, Mom!”</u> I yelled as I pushed through the screen door letting it slam shut behind me.</p> <p>As I ran for the sidewalk, I watched the bus pull away from the curb and turn down the next street. <u>Soon it was out of sight.</u></p> <p>Write an ending that finishes the story by solving the problem.</p>	<ul style="list-style-type: none"> • The situation is one most students can relate to. Even if they don’t take a school bus, there are enough details in the stimulus to communicate a clear “problem” for the writer to “solve” by writing “what happens next” (apple for breakfast, only an hour left, hair standing out, etc.). • The sparse <u>dialogue</u>, <u>short sentences</u>, dashes, and exclamation points all serve to echo the narrator’s anxiety (rather than reflect immature choppy writing). These techniques also communicate a clear mood for the story.
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**Smarter Balanced
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Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Grade 3, Target 6a—Organization

A student is writing an opinion letter for a class newsletter about serving flavored milk in school cafeterias. The student wants to revise the letter to improve the organization. Read one paragraph from the draft of the letter and complete the task that follows.

Some people believe that schools should not serve flavored milk at lunch. According to them, students get too much sugar. It is true that flavored milk has more sugar than plain milk, but some students just will not drink plain milk. If that happens, they will not get the necessary calcium, vitamins, and other nutrients. That can't be good. Drinking flavored milk is certainly healthier than not drinking any milk at all.

The beginning of the student’s letter does not state the opinion. Write an opening paragraph that clearly states the opinion and explains what the topic is about.

- The topic is of interest to students, making this an appealing stimulus for the grade level.
- This stimulus is very short, but the preamble states that it is just *one* paragraph from a draft. Still, there is sufficient information for students to write an introduction with a clear opinion on the issue.
- Again, despite brevity, the sentence structures (simple, compound, and complex) are mature and the sentences vary in length.
- Some strong word/phrase choices reinforce the purpose.
- The writer wants to support the opinion by proving why those against it are wrong and that is a sophisticated approach; however, phrases such as “according to them” and “It is true” help readers navigate the reasoning and clearly see the writer’s opinion.
- There are some specific reasons offered.

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Grade 4, Target 6a—Organization

A student is writing an opinion essay for class about allowances. The student wants to revise the draft to improve the organization. Read the draft of the body of the essay and complete the task that follows.

When I was eight years old, my parents gave me a list of chores to do each week. If I did my chores, I received an allowance of three dollars. Since there was always something I wanted from the dollar store, my parents knew that they could count on me to get my chores done.

Giving children an allowance helps them learn how to handle money. They learn the value of a dollar and get a sense of what things cost. They also learn how to plan ahead for the money they will need to buy the things they want. In other words, kids learn to make smart choices.

An allowance for children can even help parents. It is hard for working parents to keep up a household these days. By doing tasks around the house, children can be a big help to their parents.

All in all, I am glad my parents helped me learn about our house and about managing money. Both skills will help me throughout my life.

The beginning of the student’s opinion essay does not state the opinion. Write an opening paragraph that clearly states the opinion and explains the topic.

- This stimulus is actually slightly above grade level readability but certainly accessible to grade 4 students, most of whom probably do chores at home.
- There is some nice sentence variety. For example, sentences starting with phrases and dependent clauses balance subject/verb/object sentences.
- The writing is coherent: many transitions are subtle; others are straightforward (“in other words” and “all in all”) to reinforce key concepts.
- Some generalizations made enhance the stimulus, beginning to move students beyond just “themselves.”

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Grade 4, Target 3a—Organization

A student is writing a report for the teacher about a place she visited on a recent class trip. The student wants to revise the draft to improve the organization. Read the draft of the report and complete the task that follows.

We had a great time at the “world’s largest children’s museum.” We dug for fossils in the Dinosaur Dig and saw some creepy mechanical insects. The museum had a unicorn beetle, a praying mantis, a scorpion, a black widow spider, a carpenter ant, and a dragonfly. Some of us even climbed a limestone wall and checked out mummies.

Before we left, we visited the Planetarium, where we learned how a telescope works and saw the Milky Way. Looking at the stars on the ceiling made it easy to understand why David Wolf was inspired to become an astronaut when he visited the museum as a nine-year-old boy.

Our trip ended too soon. But we have some great memories of our visit to this famous place.

Write an introduction that clearly states the main idea of the paper and sets up the information to come in the body of the report.

- This strictly informative (rather than explanatory) stimulus provides two body paragraphs with distinctly different subtopics for a report on a field trip to a children’s museum. This allows students to write a coherent introduction that will set up the context for the subtopics.
- Although many of the sentences remain subject/verb/object, there is sufficient variety to reflect the developing skills of intermediate writers (e.g., phrases such as “Before we left...,” “Looking at the stars...”). Other syntactic complexities include compound verbs and a variety of dependent clause types.
- Some specific vocabulary is evident (“inspired” rather than “made him want”).

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Grade 5, Target 1a—Elaboration

A student is writing a story for class about a visit from a cousin from South America. The student wants to revise the draft to add more details about when they first met. Read the draft of the story and complete the task that follows.

Just yesterday my parents surprised me with the news that my cousin was coming today to stay with us for a few weeks. The news made me excited and worried. I did not know much about Joe. For years he has lived in Peru in South America, and I have never met him. I know that his father is my mother's brother, and I know that he, like me, is ten years old.

What, I wondered, would he be like? Will he get along with my family? Will our life be strange to him? My parents laughed at my concerns and said that he and I would get along great. Besides, they said, Joe has spent time in this country and knows some things about life here. My mother said that he would like to meet my neighborhood friends. She said that he would fit right in right away. I wasn't sure about that, but I'm going to find out in a few minutes.

We are at the airport, and Joe's plane has just landed. As the passengers get off the plane, I try to guess which one could be Joe. Then my mother shouts, "There he is!"

Continue the narrative, using dialogue and details to describe what happens when Joe and his cousin first meet.

- While most sentences are still subject verb object, students are beginning to vary structure (Simple, Compound, Complex, even Compound-complex).
- While still relying on some general language ("would get along great"), intermediate writers start to incorporate more task-specific word choices ("concerns" so as not to repeat "worried"). Also uses simple phrases effectively ("like me").
- Uses questions effectively to engage reader.
- *Inner dialogue* is used effectively through the entire piece so that the reader can "visualize" the narrator's feelings.
- The movement of time from "just yesterday" to "I'm going to find out in a few minutes" is a mature feature and sets up the coming action nicely for the writer. These **transitions** enhance coherence.

Note that the stimulus *nicely* sets up "the problem" for writers to solve via narrative

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Grade 6, Target 3a—Elaboration

The student is writing a report for English class about community service. The student wants to revise the draft to improve the development of ideas. Read the draft of the introduction to the report and complete the task that follows.

Taking a few hours out of our busy week can make a world of difference for a community. Choosing to spend a couple of hours a week serving a local area can be a useful volunteer service. Community leaders are always looking to improve the place they and their neighbors live in. They are always seeking volunteers to serve in many parts of the community. Volunteering is not just beneficial for the community, it is also beneficial for students themselves.

The student has taken the following notes from credible sources:

Student Notes:

Community service activities:

- Environment - cleaning up trash along a highway (Adopt-a-Highway); planting trees; cleaning beaches.
- Animal shelters – exercising animals; cleaning cages
- Helping seniors – visiting, shoveling snow, cutting grass, shopping, etc.
- Running or walking in a race to raise money for charity

Facts re: student service

- about one-half of states in US require some service for graduation (average 60 hours)
- volunteering can help students get into college
- 2007, almost 25% of high school students had volunteered

Using information from the student's notes, write one or two paragraphs developing the idea in the last sentence of the first paragraph.

- Although the stimulus is “just” an introduction, the introduction sets the expectation for an equally coherent response.
- While less proficient writers may be tempted to “list” details from the notes; the task specifically directs students to develop/ elaborate the ideas.
- Word choices are as specific as they can be for an introduction (“benefit” and “a world of difference” rather than “do good things”).
- Students in middle school are beginning to use verbals and this sample uses participial, infinitive, and gerund phrases effectively. The use of phrases also helps vary the sentence structures.
- The notes provide sufficient information for elaboration, yet the information cannot simply be cut-and-pasted. Note also that while the details are mostly examples, they get beyond personal examples by emphasizing the larger community.

Grade 6, Target 6a—Organization

A student is writing an article for the local humane society newsletter in honor of National Adopt a Shelter Cat Month. This article argues that cats are the best choice to have as a pet. The student wants to revise the draft to improve its organization. Read the draft of the article and complete the task that follows.

The Purr-fect Pet

When pondering the adoption of a pet, there are many options available at your local pet shelter. After learning more about the various types of pets, you may soon discover that a cat would make the best pet for you.

First of all, according to veterinarians and small animal breeders, cats are usually calm and quiet. They are unlikely to disturb neighbors with their quiet purring. In contrast, dogs that persistently bark may annoy those who live close by. It is important to be courteous to neighbors, especially if you live in an apartment or have close neighbors. Even if you are looking at a well-behaved and quiet dog, there are other reasons to consider a cat instead.

Cats require a minimal amount of work from their owners. Cats know how to groom themselves, so owners do not have to recall the date of the last kitty bath. In addition, cat owners will notice that cats demand less daily attention than dogs. Unlike dogs that need to go outside at least once each day for exercise, cats can get all the activity they need indoors. Cats also do not need to be taken out to take care of other physical needs. While it’s true that cat owners pay money for litter boxes, a cat owner will not need to purchase fancy toys because a cat can find a paper bag, a box, or a few balls of wadded paper to be a great source of entertainment.

This article is missing a conclusion. Write a concluding paragraph that follows from and supports the argument.

- The introduction is broad enough (sets the context for the “argument”) and there is enough specific information in the body paragraphs for the writer to generalize about the argument (rather than repeating points) in the conclusion.
- Sentence structures are varied (paragraph 3 moves from simple to compound to complex) and sentence lengths are varied.
- Vocabulary is mature but easily determined from context.
- Despite traditional transitions choices, there is syntactic maturity.
- “According to veterinarians and small animal breeders” shows the transition to “credible evidence” from opinion-based examples more prevalent in earlier grades.

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Grade 7, Target 6a - Organization

A student is writing a letter to students and teachers about the amount of homework teachers should assign. The student wants to revise the letter to improve its organization. Read the letter and complete the task that follows.

Homework serves at least three purposes. To begin with, it gives students a chance to practice what they have learned in class. This reinforces classroom lessons and helps students remember them. Homework also helps students learn to manage their time—a skill that will be essential as they become more involved in extracurricular activities in middle school and high school. Finally, homework helps students develop study skills that they will use throughout their academic and professional lives.

Teachers should not give an excessive amount of homework, however. Certainly, the proper amount of homework—about 10 minute per grade level per night, according to some experts—is beneficial. But an excessive amount has harmful effects. Too much homework can negatively affect family life. For example, kids might not have time for dinner—an important time for family members to connect with one another. Also, too much homework can harm families by causing arguments between children and their parents. Excessive homework can rob students of time for other activities such as sports or music lessons. Worst of all, too much homework can cause students to hate school, something that obviously discourages learning.

In conclusion, students who want to make higher grades need to do their homework. But teachers who want students to learn and be better prepared and well-rounded need to not give too much homework.

Write an introductory paragraph to the letter that establishes and introduces a clear claim about an appropriate amount of homework.

Grade 7 is the first grade to require students to address the counterclaim. This stimulus shows the beginnings of this progression.

- The first body paragraph presents and explains a clear claim about the purposes for homework. However, this paragraph is highly formulaic (even at grade 6 *and* even if the number three is appropriate for the available support, transitions should be more subtle and not always occur at the beginning of the sentence).
- The second paragraph *nice*ly addresses (rather than just acknowledges) the opposing view point via concession and then moving to show why the opposing point of view falls short. While some of the “evidence” is still anecdotal, there are references to credible sources and some specific examples. As grade level increases, so should the nature of the evidence; more verifiable and specific information, such as actual data, would enhance this stimulus.
- Sentence structures and lengths are increasingly mature and varied.
- Strong vocabulary fits the tone and enhances the purposes (“reinforces,” “manages,” “academic and professional lives,” “discourages”).

Smarter Balanced English Language Arts & Literacy Stimulus Specifications

Grade 7, Target 6a–Elaboration

A student is writing a letter to the editor for the student newspaper about adopting dogs from shelters. The student wants to revise the letter to improve the development of ideas. Read the draft of the introduction to the letter and the student's notes, and then complete the task that follows.

If you and your family are thinking of getting a puppy, you should consider adopting one from an animal shelter. Although you could buy a puppy from a breeder, there are many good reasons for adopting from a shelter instead. Considering all the evidence can help families make an informed decision.

The student has taken the following notes from credible sources:

Student Notes:

- Shelters have many different types of dogs.
- Quote from local shelter veterinarian – “When you adopt a puppy from a shelter, you give it a second chance”
- More than 25% of shelter dogs = purebred.
- Responsible breeders – clean facilities, vaccinate puppies, screen pet owners, usually have only puppies
- The average cost to own a dog = \$600 - \$900 per year
- 62% of all households in the United States have a pet.
- A recent Ohio poll done by a shelter shows 70% of people want puppies not older dogs
- In the US, 164 million pets, 1 in 20 will end up in a shelter
- Most dogs in shelter are older dogs

- The notes provide a mix of verifiable “evidence,” including actual data, and “credible” but anecdotal evidence. The evidence allows for integration of information (e.g., not all the information would necessarily be used).
- Grade 7 is the first grade to require that students at least acknowledge the counterclaim and there is enough information in the student’s notes for the counterclaim to be addressed.
- Words/phrases such as “responsible breeders,” “animal shelters,” etc. enhance the argumentative purpose without being overly academic.

Use relevant information from the student’s notes to develop one or two paragraphs supporting the student’s underlined claim.

**Smarter Balanced
English Language Arts &
Literacy Stimulus Specifications**

Grade 8, Target 1a—Elaboration

A student is writing a narrative about persistence for a class anthology. Read the draft of the beginning of the narrative and complete the task that follows.

Ken, my athletic rival throughout elementary and junior high, always had a knack for tackling new challenges and succeeding without really trying. Athletics simply came easily to Ken. It always seemed that I had to compete with blood, sweat, and tears just to be able to make it through tryouts. Although I was praised by the coaches for my hustle and effort, in the end, I would often be one of the players cut from the team. It was a constant uphill battle to measure up to Ken, but it was a mountain I was determined to climb and conquer as we got ready for tryouts for basketball.

The student’s draft introduction begins to describe a time when he faced a challenge and persisted until he achieved his goal. Continue the narrative using dialogue and description to show what happens when Ken and the narrator compete for a spot on the basketball team.

- What makes this [brief] stimulus appropriately rigorous (because the subject itself could be appropriate for most any grade level) is language use. Language choices are specific and lively (“knack for tackling,” “uphill battle...mountain” “blood, sweat, and tears”).
- Stimulus demonstrates sophisticated use of sentence structures (e.g., appositive/noun phrase, interrupters such as “in the end,” varied sentence lengths).
- As a narrative for grade 8, this stimulus invites a response that is more than just “tell a story about...;” instead, the stimulus encourages character development and invites reflection—mature characteristics of a nuanced narrative.
- The question leaves room for a resolution that doesn’t necessarily rely on “beating” Ken.

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Grade 11, Target 6a—Elaboration

A student is writing an editorial for the local newspaper about a proposed curfew for students under age 18. The student wants to add information about the detrimental effects a curfew would have on the community. Read the draft editorial and the student notes; then complete the task that follows.

When considering the proposed 9 p.m. curfew for people under 18, please consider carefully the negative effects that such a curfew could have on parents, students, and our local economy. Please also keep in mind that age does not define maturity.

In addition to harming the high school students, the proposed curfew could hurt the community as a whole.

Rather than the government imposing a curfew, why not leave it up to parents to set and enforce such rules for their teenagers? If underage drinking and the illegal distribution of drugs and alcohol are problems that you believe are associated with late-night teen activity, focus on those activities and the small minority of teens who engage in them. Don't punish local business people, parents, and the vast majority of teens who act responsibly for the misbehavior of a few.

The student has taken the following notes from credible sources.

Student Notes:

- Group work needed for many school projects – sports/extracurricular activities dominate afternoons.
- Students' part-time jobs sometimes supplement family income
- "Average high school student works 20 hours per week" (2010, Department of Labor)
- Most teen jobs are only available after regular work day hours (adults want the 9 to 5 jobs)
- City council president opposes "penalizing students for being involved" in sports/extracurricular activities
- Supporters of the curfew: according to a study commissioned by the district attorney, curfew will prevent crime
- Giving up extracurricular activities to take earlier work shifts could hurt college prospects – colleges look for well-rounded students
- A recent countywide survey: proposed curfew forces parents to drive students who could drive themselves – who cares for younger children at home?

- Mature syntax choices including complex sentences with dependent clauses of various types (adverb, adjective, noun) and in various positions.
- Rhetorical question effectively used.
- Effective word choices for audience without being didactic or overly-scholarly.
- Makes sophisticated generalizations instead of clichéd claims.
- Mature use of modifiers/phrases e.g., "late night teen activity" as opposed to the wordier "activities teens participate in late at night," which is what a younger student would write.
- The notes offer sophisticated information; students need to locate and use the relevant information to support the claim.

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<p>Using the underlined topic sentence, complete the second paragraph. Use information from the student's notes in your paragraph.</p>	
<p>Grade 11, Target 1a—Elaboration</p> <p>A student is writing a college admissions essay (or job application essay) that asks about a challenge the student has met. Read the beginning of the draft and complete the task that follows.</p> <p>I have always been the best player on the team. I have played women's club volleyball since the age of seven and was invited to play with the elite "traveling team" by the age of twelve. <u>Being "first team" was never in question; my coaches' only decision was always which position I would play, as I excelled at all. In retrospect, you might say—at best— I was confident; at worst, I was cocky.</u></p> <p><u>Being the team diva</u>, I assumed that of course I would be the team captain for senior year. <u>Who else would they choose? There was no other choice. Right? Wrong!</u> I take you back to August, day one of preseason.</p> <p>The coach welcomed new and old players, and then <u>moved forward with the business of the day</u> by saying, "Our first order of business is <u>electing a captain</u>. Your captain will represent you all season, she will be the one to pick you up when you are down, and pat you on the back when you excel."</p> <p>Looking at each senior, and finally at me, she <u>challenged</u> us to "Think carefully about who you want to lead and represent you this year, and then cast your vote."</p> <p>They did. I was not the new team captain.</p> <p>Continue the narrative by showing what happens when the narrator is not elected team captain. Use dialogue and description to show how the narrator responds to the challenge.</p>	<ul style="list-style-type: none"> • This sample shows narrative writing at the high school level: narrative in the service of another, larger purpose (in this case, a college or job application). The item stimulus sets up a clear segue into the narrative portion. Furthermore, the ending provides the reflection, the "so what," called for in conclusions at this grade level. • The sentences are mature, combining a range of techniques from <u>juxtaposed ideas</u>, <u>questions (and retorts)</u>. Phrases are well-chosen for the audience and purpose (<u>participial</u> and <u>gerund</u>). • Rhetorically effective punctuation such as the semi-colons, questions and dashes, help reveal the character, helping the reader "hear" the writer's thoughts. • The <u>vocabulary</u> is mature yet engaging and appropriate for the narrative purpose.

Appendix E: Stimulus Specifications for Performance Tasks

I. Classroom Activity

The Classroom Activity is part of the Performance Task that precedes the scored individual component of the task. The main purpose of the Classroom Activity is to ensure that all students have a common understanding, at a minimal level, of the contextual elements of a Performance Task, so they are not disadvantaged in demonstrating the skills the task intends to assess. Contextual elements may include: an understanding of the setting or situation in which the task is placed, potentially unfamiliar concepts that are associated with the scenario (e.g. how stocks are traded on the stock market); and key terms or vocabulary students will need to understand in order to meaningfully engage with and complete the Performance Task.

The activity may build on or activate students' prior knowledge of the topic, build students' interest in the topic, and/or engage students in small group and whole group discussions as a "warm up" to the Performance Task. Thus, the Classroom Activity must be specific enough to provide support to students in understanding the Performance Task that is to follow.

Another important function of the Classroom Activity is that it sets the context for 4-6 individual Performance Tasks on the same topic. As such, the Classroom Activity must also be broad enough to support access to all of the individual Performance Tasks written for a variety of writing purposes in the task set (or family) while not privileging any.

The Classroom Activity should be a maximum of 30 minutes in length.

Given these purposes and constraints, the following are guidelines for the development of the Classroom Activity.

- **The Classroom Activity must be accessible to all students** keeping in mind students who are visually impaired, blind, hearing impaired, deaf, have limited motor skills, etc. If images are used, they must be able to be translated into a form that is accessible to all students. (See "Guidelines for the Inclusion of Images" on page 11 of the *ELA Stimulus Specifications* for a more detailed list of images that can be translated into accessible forms.) Visual images in the Classroom Activity that cannot be translated into an accessible form should not be used. In addition, care must be taken in the use of materials that convey visual imagery or references to sounds that might not be in the realm of experience for visually or hearing impaired students. These may be used, as long as they are NOT crucial for understanding the topic(s), concept(s), or domain-specific vocabulary necessary for completing the Performance Task successfully. No audio stimuli are to be used.
- If the use of visual stimuli is necessary for the Classroom Activity, it should not be assumed that schools will have technology in every room to project text or images onto a screen, equipment or other specialized resources such as world maps or globes. If color photos or visuals are included, states or districts will need to provide these in hard copies to the school as it cannot be assumed that schools will have the capacity to provide color printing.

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- **Texts should be avoided** since students will be required to do extensive reading during the actual Performance Task. If any text is used in the Classroom Activity it **should be very short, engaging, critical for the activity, and be read aloud by the facilitator**. The concepts/ information should be cognitively appropriate and the vocabulary used in the text should be on or below grade level. The text should be accessible to English learners, avoiding the use of unnecessary specialized vocabulary, idioms, and other expressions that are likely to be unfamiliar to English learners.

See *Specifications for Performance Task Classroom Activities* for a more detailed explanation.

II. Scenario of the Performance Task

Each Performance Task includes a scenario that sets up the context, purpose, and audience for doing research and writing. The purpose is to provide an authentic context and purpose that motivates students to engage in the task. This introduces additional reading that a student must do to complete the task appropriately.

Given these purposes of the scenario, the following are guidelines for text that may be used in the scenario:

- The scenario should be short, generally a paragraph of 3-7 sentences (3-5 sentences at Grades 3-4; 5-7 sentences at Grades 5-11), so that a student does not have to spend a great deal of time reading the scenario.
- The scenario should be simple and simply worded so that the purpose for research/writing and the audience is clear and easy to understand.
- The scenario should not tell students the specific writing prompt for the full-write but may indicate a general purpose and context for writing so that students read the sources with a purpose in mind.

III. Stimuli Used in the Performance Task

Each Performance Task includes 2-5 sources, depending on the grade level. See below for the allowable number of sources for each grade span:

Grade Span	Number of Sources
3	2
4-5	3
6-8	3-4
11	4-5



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Because students must read and integrate multiple sources within a given amount of time, the sources as a whole should not exceed the maximum word counts below.

Grade Span	Maximum Word Counts
3	1000
4	1400
5	1400
6	2400
7	2400
8	2400
11	3400

- Within a Performance Task set, a stimulus may be used in a second Performance Task. If this is done, it must be with different companion stimuli. In addition, the second Performance Task must have a different focus and purpose so that the Performance Task is different from the first Performance Task.
- **Fully accessible tasks.** In at least **ONE** of the individual tasks within a single task set of 5-6 tasks, **the full set of stimuli must be accessible to all students.** If images are used, they must be able to be translated into a form that is accessible to all students. (See “Guidelines for the Inclusion of Images” on page 11 of the *ELA Stimulus Specifications* for a more detailed list of images that can be translated into accessible forms.) Visual images that cannot be translated into an accessible form can NOT be used in that specific Performance Task. In addition, care must be taken in the use of texts that convey visual imagery or references to sounds that might not be in the realm of experience for visually or hearing impaired students. These may be used, as long as they are NOT crucial for understanding the topic(s), concept(s), or domain-specific vocabulary necessary for completing the Performance Task successfully.
- In the remaining tasks within a task set, **stimuli should generally be accessible to most students**, but there may be visual stimuli included in the set of sources that are not fully accessible.
- **Simulating authenticity.** Stimuli should be presented as a set of sources that students might authentically find through a search, in alignment with the context of the writing assignment. The set of stimuli should come from resources that might be available to students in the classroom, library, or the Internet. They should not include writing such as personal letters/emails that would never show up as a result of a search, with the exception of those that can be considered primary sources.

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- **The set of stimuli within a task should vary in content.** The content of the sources should vary and represent multiple perspectives or different facets of a topic so that students must pull evidence and examples from different sources in their responses to the constructed-response research questions and the full-write. In order to reduce the temptation for students to directly copy large segments of text, none of the sources should in themselves comprise a full response to the culminating writing assignment. Overall, the sources should offer more factual information and sourcing than just unsupported opinions.
- **In informational/explanatory tasks:** The set of sources should provide enough evidence that allows students to establish and support a main idea at grades 3-5 and a thesis/controlling idea at grades 6-11, rather than simply restating the ideas within the sources. Informational performance tasks should be developed for students in grades 3-5 while explanatory performance tasks should be developed for students in grades 6-11.
- **In opinion/argumentative tasks:** The set of sources should support both sides of an issue. The set of sources should be balanced so that a particular opinion is not privileged; the sources should allow for students to support different opinions. For an argumentative task, sources should cover the subject sufficiently enough to allow students to form a claim and address the counterclaim (grade 7 and above). Opinion Performance Tasks should be developed for students in grades 3-5 while argumentative performance tasks should be developed for students in grades 6-11.
- The set of Performance Task stimuli should come primarily from authentic permissionable sources (CCC-approved or public domain sources). In these cases, stimuli may not be modified but may be excerpted using ellipses (...) to indicate where text has been left out. Domain-specific and low-frequency vocabulary words that may be too difficult for students may be defined using brackets [] if the definition is less than three words, or a footnote for longer explanations. The words chosen should be essential to comprehending the stimuli and cannot be ascertained from the context.
- If authentic, permissionable, and public domain sources have been exhausted, commissioned sources may be used. In this case, a strong justification should be made as to why the commissioned source must be used (e.g., lack of grade-level appropriate sources on the topic).
- **The set of stimuli may vary in credibility or usefulness.** Because the ELA Performance Tasks are research tasks that require student selection and evaluation of sources for credibility/relevance, the stimuli may vary in credibility and usefulness.
- Each stimulus/source should be preceded by an introduction to the source, including the publication name and date, author's expertise/position in relation to the topic, type of publication (if relevant), topic of the source, purpose, audience, or other context information that will allow students to evaluate the source.

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- Each permissionable or public domain source should be followed by a formal citation of the source using APA formatting.
- For commissioned stimuli (those that are written based on a composite of sources), an authentic source should be simulated but should not use made-up publication titles or individual names. In other words, rather than making up the name of a newspaper and author, use general roles or types of publications (e.g., “This editorial about homework was written by a parent and published in your local newspaper.”; “This article comes from a psychology journal and was written by a psychology professor.”) A list of references that the article was based on should be included at the end of the article, using APA formatting.
- **Within informational texts used in Grades 6 and higher, when it is important for students to evaluate the credibility of sources**, stimuli should vary in the extent to which sources are cited (i.e., through in-text citation) to aid the student in assessing the reliability of the information presented in the sources. When source references are available (e.g., footnotes), these should be cited using APA formatting as appropriate to the source genre. When sources are cited, a reference page should be included with the full references to the sources cited using APA or MLA formatting as appropriate.
- **The set of stimuli should vary in style and format to improve accessibility to students.**
- **Use of visuals.** When appropriate, visuals may be used to support access to the text. Visual/graphic sources that are included within the stimuli should serve a purpose (e.g., making an abstract concept, idea, or process described in the source more understandable, providing additional information relevant to understanding the topic or subtopic). They should be highly relevant to the topic or subtopic of the source, and not introduce distracting or irrelevant information.
- Visuals should be simple and easy to interpret. They should not add significantly to the reading load. Tables or graphs should not require the use of mathematical computation to interpret their meaning.
- Visuals may often come with an authentic source. These may be used provided the image copyright is covered by the CCC or is public domain.
- When a Performance Task includes 3- 5 sources, one source may be a visual source in itself. When a visual stimulus is used as a source in itself, it should have a substantive purpose and provide information that can be used in the constructed response questions or essay. For Grade 3 Performance Tasks, where there are only 2 sources, visuals may be included *within* the sources as delineated above.
- **Visual stimuli** should be accompanied by a short, appropriate caption and source.

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- For fully accessible tasks, visual stimuli will also need to be translated into descriptions. Certain visual stimuli may not be able to be translated into descriptions without reducing the cognitive complexity of the task. For fully accessible tasks, see “Guidelines for the Inclusion of Images” on page 11 of the *ELA Stimulus Specifications* for a more detailed list of images that can be translated into accessible forms.

Textual stimuli should range in difficulty and complexity. The complexity of the textual stimuli should be, on average, at approximately the lower end of the target grade level. The vocabulary used in the stimulus and the item should be on or below grade level (or provide a definition of three or less words in brackets or for a longer definition, a footnote- see page 52). In some cases, a complex authentic source that is at a reading level above the target grade (e.g., an historical primary source document) may be included, but these should be used with caution and appropriate supports should be provided. The expectation is that every stimulus (source) selected will have a Text Complexity Analysis Worksheet (see *Appendices A and B* in this document for samples) to support its placement at a grade level.

- **Textual stimuli should be accessible to English learners.** The use of idioms and other expressions that are likely to be unfamiliar to English learners should be avoided. When such words and phrases appear in authentic texts, they should be glossed.
- **Textual stimuli may include the following genres of writing:**
 - **Informational and literary non-fiction texts:** Includes the subgenres of newspaper, magazine, and Internet articles, essays, memoirs, speeches, interviews, primary and secondary accounts, how-to articles, and functional reading materials such as advertisements, charts, and slide presentations.
 - **Literary texts:** Includes the subgenres of narrative fiction, short stories (excerpts), poetry, and song lyrics. In general, although there might be some exceptions, these are generally **not** appropriate for these research tasks.

Allowable uses of literary texts for grades 3-11 opinion/ argumentative, informational/explanatory Performance Tasks:

 - Within the Performance Task, literary stimuli should be used **sparingly** (within a set of sources, only one may be a literary text).
 - If a literary text is used, informational/nonfiction texts must be included to set the context for the literary text.
 - If a literary text is used, the focus of the research and full-write may **not** be literary analysis, but deeper understanding of the topic or theme.