



NORTH CAROLINA
State Board of Education
Department of Public Instruction

Report to the North Carolina General Assembly

North Carolina Personalized Assessment
Tool (NCPAT) Pilot

SL 2019-212 (SB 621), Section 2.(b)

Date Due: November 15, 2021
DPI Chronological Schedule, 2021-2022

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Introduction

This report addresses the requirements stated in Session Law 2019-212 (SB 621), Part II. Report on North Carolina Personalized Assessment Pilot:

SECTION 2.(a) It is the intent of the General Assembly that the State move toward a through-grade assessment model, in which all State-mandated assessments are administered in multiple short testing events throughout the school year rather than in a single long testing event at the end of the year.

SECTION 2.(b) The Superintendent of Public Instruction shall report by November 15, 2020, and annually thereafter until November 15, 2024, to the Joint Legislative Education Oversight Committee regarding the progress of the North Carolina Personalized Assessment Tool (NCPAT) pilot. At a minimum, the report shall include the following, when available:

- (1) Demographic information for each school participating in the pilot.*
- (2) NCPAT performance, including proficiency and growth data, at the State, public school unit, and school level for students enrolled in participating schools. Such data shall be aggregated for all students and disaggregated for each subgroup of students identified in G.S. 115C-83.15(d1) without revealing personally identifiable information.*
- (3) End-of-grade assessment performance, including proficiency and growth data, at the State and public school unit level for students not enrolled in participating schools. Such data shall be aggregated for all students and disaggregated for each subgroup of students identified in G.S. 115C-83.15(d1) without revealing personally identifiable information.*
- (4) Feedback received from teachers, principals, unit-level staff, students, parents, and other stakeholders regarding the NCPAT pilot and a description of how such feedback was incorporated into the NCPAT pilot.*
- (5) Progress in scaling up the assessment system to additional public school units or schools measured against the Department of Public Instruction's latest time line submitted to the United States Department of Education. Page 2 Session Law 2019-212 Senate Bill 621*
- (6) Description of how the participation of any additional schools or public school units in that year contributed to progress toward achieving high-quality and consistent implementation across demographically diverse public school units.*
- (7) The most recent Innovative Assessment Demonstration Authority Annual Performance Report submitted to the United States Department of Education.*
- (8) Any communications received from the United States Department of Education related to the NCPAT pilot.*
- (9) Progress in developing a plan to replace the science end-of-grade assessments in fifth and eighth grade with through-grade assessments after the completion of the NCPAT pilot.*
- (10) Progress in developing a plan to replace all end-of-course assessments with through-grade assessments for State-mandated high school assessments after the completion of the NCPAT pilot.*
- (11) Recommendations on any changes needed in State law to continue implementation of through-grade assessments statewide after the completion of the NCPAT pilot.*

SECTION 2.(c) Notwithstanding any other provision of law, the State Board of Education and the Superintendent of Public Instruction may supervise and administer the NCPAT pilot in

fulfillment of the State's Innovative Assessment Demonstration Authority granted by the United States Department of Education.

In June 2019, the U.S. Department of Education (USED) approved North Carolina for an Innovative Assessment Demonstration Authority (IADA). Limited to only seven states, North Carolina was the third state to receive the authority to develop an innovative assessment to pilot in lieu of the current statewide assessment for a subset of students. As the development of the innovative assessment progresses, participating students will take the innovative pilot test in reading and mathematics in grades 3–8. With a five-year timeline for development, the intent is statewide implementation of the innovative assessments in the 2023–24 school year.

The proposed IADA assessment, the North Carolina Personalized Assessment Tool (NCPAT), is a balanced assessment system that will provide granular data for immediate feedback about students' performance throughout the year and summative data at the end of the year for general accountability purposes. A primary goal is to design an assessment system that provides formative feedback data to educators throughout the school year and reduces the impact of test time and test anxiety for students and schools. This is consistent with North Carolina General Statute 2019-212, Part II, Section 2.(a):

“It is the intent of the General Assembly that the State move toward a through-grade assessment model, in which all State-mandated assessments are administered in multiple short testing events throughout the school year rather than in a single long testing event at the end of the year.”

With the IADA flexibility and the requirement in North Carolina state law that the State move toward a through-grade assessment model, the North Carolina Department of Public Instruction is engaged in developing the NCPAT assessment system; however, there has been an impact from COVID-19. With the spring 2020 statewide test administrations waived by the USED, the development timeline for the NCPAT had to be modified. Newly developed NCPAT items were embedded to be field tested in the spring 2020 statewide test forms. Without statewide tests administered in spring 2020, there were no field test data on those items to build NCPAT interims for 2020–21 administrations. The NCPAT interims pilot administrations scheduled for the 2020–21 school year have been moved to the 2021–22 school year; NCPAT summative administrations scheduled for the 2020–21 school year are now planned for the 2022–23 school year. The overall timeline remains consistent with statewide implementation of the NCPAT assessment system in the 2023–24 school year.

As required, this report addresses the requirements in Session Law 2019-212.

Background and Overview

In December 2018, at the direction of the State Superintendent of Public Instruction, NCDPI applied to the US Department of Education for Innovative Assessment Demonstration Authority. In June 2019, North Carolina became one of only seven states awarded this authority, and in late August 2019 the North Carolina General Assembly passed legislation (S.L. 2019-212) endorsing the pilot, setting goals for expansion of the innovative assessments, and requiring annual reports on progress.

When NCDPI initiated the application, three school districts committed to participating in the pilot for innovative assessments for fourth grade math, seventh grade reading, or both. In spite of the challenges posed by the ongoing COVID-19 global pandemic, there were 148 schools across 14 districts and 8 charter schools committed to participating in the pilot for the 2020–21 school year. Some districts and charter schools have withdrawn from pilot participation for the 2021–22 school year; participation will include 59 schools across 10 districts and 6 charter schools. North Carolina remains on track for statewide implementation in 2023–24.

Session Law 2019–212 Report Requirements

Session Law 2019-212, Part II, Section 2.(b) requires the Superintendent of Public Instruction to report by November 15, 2020, and annually thereafter until November 15, 2024, to the Joint Legislative Education Oversight Committee regarding the progress of the North Carolina Personalized Assessment Tool (NCPAT) pilot. The required specifics of progress in the development of the innovative assessment system, NCPAT, are provided in this section. The annual report submitted to the USED on August 30, 2021, is included as Appendix A and is referenced in several of the following responses.

- 1) Demographic information for each school participating in the pilot.

For the 2020–21 school year, no schools participated in an NCPAT assessment; however, public school units provided input and recommendations on the NCPAT grade 7 mathematics test specifications for the NCPAT interims scheduled for pilot administrations in the 2021–22 school year.

Demographic information for each volunteer pilot school is included in Appendix A: ***USED 2020–21 Annual Report*** Exhibit III.A-01 2020–21 Pilot Volunteer School Demographic Information.

- 2) NCPAT performance, including proficiency and growth data, at the State, public school unit, and school level for students enrolled in participating schools. Such data shall be aggregated for all students and disaggregated for each subgroup identified in G.S. 115C-83.15(d1) without revealing personally identifiable information.

No NCPAT interim assessments were administered in the 2020–21 school year. NCPAT performance data is expected to be available following the first administration of NCPAT interim assessments (scheduled for the 2021–22 school year).

- 3) End-of-grade assessment performance, including proficiency and growth data, at the State and public-school unit level for students not enrolled in participating schools.

Such data shall be aggregated for all students and disaggregated for each subgroup of students identified in G.S. 115C-83.15(d1) without revealing personally identifiable information.

End-of-grade performance data for all schools (including those in the pilot) will be available following the spring 2022 End-of-Grade test administration as the NCPAT interim assessments will be first administered in the 2021–22 school year.

- 4) Feedback received from teachers, principals, unit-level staff, students, parents, and other stakeholders regarding the NCPAT pilot and a description of how such feedback was incorporated into the NCPAT pilot.

NCDPI gathered feedback from stakeholders throughout the 2020–21 school year. A summary of stakeholder feedback is included in Appendix A: ***USED 2020–21 Annual Report*** Section IV: Consultation and Feedback. Additional feedback will be gathered as the pilot progresses.

- 5) Progress in scaling up the assessment system to additional public-school units or schools measured against the Department of Public Instruction's latest timeline submitted to the United States Department of Education.

The NCDPI has continuously shared information with public school units to encourage participation in the pilot. To date, the pool of volunteers has grown substantially from the initial application that included assurances from three public school units. As reported in the ***USED 2020–21 Annual Report*** (see Appendix A: Section I: Progress toward Plan and Timeline), there were 148 schools across 14 districts and 8 charter schools committed to participating in the pilot for the 2020–21 school year.

The requirements of the IADA do not allow all schools to participate in the pilot. The IADA uses the current state assessments as the comparison to ensure validity of the reported academic achievement levels for students. The number of students in the volunteer schools must reflect the demographics of the State and must support the outcomes of the statistical analysis necessary to build the NCPAT assessment system.

- 6) Description of how the participation of any additional schools or public-school units in that year contributed to progress toward achieving high-quality and consistent implementation across demographically diverse public school units.

Overall, the voluntary districts and charter schools represent the diversity of North Carolina.

Some districts and charter schools have withdrawn from pilot participation for the 2021–22 school year, often citing local staffing and instructional development challenges in response to COVID-19. Haywood County Schools has joined the pilot for the 2021–22 school year and participation will include 59 schools across 10 districts and 6 charter schools. The NCDPI continues to seek and accept pilot volunteers statewide annually.

- 7) The most recent Innovative Assessment Demonstration Authority Annual Performance Report submitted to the United States Department of Education.

On August 30, 2021, the NCDPI submitted the 2020–21 report to the USED (see Appendix A: *USED 2020–21 Annual Report*).

- 8) Any communications received from the United States Department of Education related to the NCPAT pilot.

The USED provided an updated template for submitting the 2020–21 report that is provided in Appendix A.

- 9) Progress in developing a plan to replace the science end-of-grade assessments in fifth and eighth grade with through-grade assessments after the completion of the NCPAT pilot.

The NCPAT pilot is currently a research proposal; no assessment data, including proficiency and growth measures, will be available until after the pilot administration. Following a successful outcome of the full pilot proposal and statewide implementation in the 2023–24 school year, the NCDPI will develop a plan to replace the science end-of-grade assessments with the NCPAT assessment system.

- 10) Progress in developing a plan to replace all end-of-course assessments with through-grade assessments for State-mandated high school assessments after the completion of the NCPAT pilot.

The NCPAT pilot is currently a research proposal; no assessment data, including proficiency and growth measures, will be available until after the pilot administration. Following a successful outcome of the full pilot proposal and statewide implementation in the 2023–24 school year, the NCDPI will develop a plan to replace all end-of-course high school assessments with the NCPAT assessment system.

- 11) Recommendations on any changes needed in State law to continue implementation of through-grade assessments statewide after the completion of the NCPAT pilot.

Though there are not any specific needed changes currently identified, the NCDPI will continue to consider any needed changes to State law for successful implementation of the NCPAT.

Conclusion

Successful implementation of the NCPAT as allowed by IADA is dependent on the following factors: (1) the NCDPI's capacity to develop items and pilot the through-grade NCPAT system with a demographically representative sample of students, (2) the inclusion of public-school units, both as participating in the pilot administrations and as providing feedback, and (3) the on-going psychometric analysis that will support a reliable and valid assessment system that meets technical requirements. In the first year of the five-year pilot, the NCDPI has progressed as planned, even with a shift in the timeline due to COVID-19.

The timeline for the first NCPAT administrations was moved from the 2020–21 school year to the 2021–22 school year due to COVID-19 impacts; however, the development process has not been altered. It is still anticipated that statewide implementation of the NCPAT will occur in the 2023–24 school year.

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+Grantee	North Carolina Department of Public Instruction (NCDPI)
Contact Name	Tammy Howard
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Year of Submission	2021

INSTRUCTIONS

Section 200.105(a)(d)(3) of the regulations for the Innovative Assessment Demonstration Authority provide that State(s) receiving the authority must report the following annually to the Secretary, at such time and in such manner as the Secretary may reasonably require:

- (i) An update on implementation of the innovative assessment demonstration authority, including--
 - (A) The SEA's progress against its timeline under 34 CFR 200.106(c) and any outcomes or results from its evaluation and continuous improvement process under 34 CFR 200.106(e); and*
 - (B) If the innovative assessment system is not yet implemented statewide consistent with 34 CFR 200.104(a)(2), a description of the SEA's progress in scaling up the system to additional LEAs or schools consistent with its strategies under 34 CFR 200.106(a)(3)(i), including updated assurances from participating LEAs consistent with paragraph (e)(2) of this section.**
- (ii) The performance of students in participating schools at the State, LEA, and school level, for all students and disaggregated for each subgroup of students described in section 1111(c)(2) of the Act, on the innovative assessment, including academic achievement and participation data required to be reported consistent with section 1111(h) of the Act, except that such data may not reveal any personally identifiable information.*
- (iii) If the innovative assessment system is not yet implemented statewide, school demographic information, including enrollment and student achievement information, for the subgroups of students described in section 1111(c)(2) of the Act, among participating schools and LEAs and for any schools or LEAs that will participate for the first time in the following year, and a description of how the participation of any additional schools or LEAs in that year contributed to progress toward achieving high-quality and consistent implementation across demographically diverse LEAs in the State consistent with the SEA's benchmarks described in 34 CFR 200.106(a)(3)(iii).*
- (iv) Feedback from teachers, principals and other school leaders, and other stakeholders consulted under paragraph (a)(2) of this section, including parents and students, from participating schools and LEAs about their satisfaction with the innovative assessment system;*

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In addition, Title I, Part B, section 1204(c)(2) of the Act requires that progress shall be reported based on the annual information submitted by participating States described in subsection (e)(2)(B)(ix) and examine the extent to which—

(A) with respect to each innovative assessment system—

(i) the State educational agency has solicited feedback from teachers, principals, other school leaders, and parents about their satisfaction with the innovative assessment system;

(ii) teachers, principals, and other school leaders have demonstrated a commitment and capacity to implement or continue to implement the innovative assessment system; and

(iii) substantial evidence exists demonstrating that the innovative assessment system has been developed in accordance with the requirements of subsection (e)

(B) each State with demonstration authority has demonstrated that—

(i) the same innovative assessment system was used to measure the achievement of all students that participated in the innovative assessment system; and

(ii) of the total number of students, and the total number of each of the subgroups of students defined in section 1111(c)(2), eligible to participate in the innovative assessment system in a given year, the State assessed in that year an equal or greater percentage of such eligible students, as measured under section 1111(c)(4)(E), as were assessed in the State in such year using the assessment system under section 1111(b)(2).

To meet the requirements for this annual performance report, please provide the requested information in each of the sections that follow. The U.S. Department of Education understand that coronavirus may have affected the development and implementation of innovative assessment systems during the reporting year (2020-21). To the extent your SEA would like to provide more context or details related to these impacts, please incorporate them into your responses where relevant.

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I: Progress toward Plan and Timeline

Provide a description of the SEA's (or Consortium's) progress towards its plan and timeline in its approved application:

The emergence of COVID-19 as a national health emergency resulted in the closure of the State's schools in March 2020. With the spring 2020 tests waived, the NCDPI was unable to field test embedded items in the grade 4 mathematics end-of-grade tests and the grade 7 reading end-of-grade tests for the North Carolina Personalized Assessment Tool as planned in the 2019–20 school year. This prevented the development of interims for administration in the 2020–21 school year. Thus, the grade-level pilot implementation timeline has been modified as follows for

- the 2021–22 school year: Grades 4 and 7 Reading and Mathematics (interims only);
- the 2022–23 school year: Grades 4, 5, 7, and 8 Reading and Mathematics (interims and multi-staged adaptive summative assessment); and
- the 2023–24 school year: Grades 3–8 Reading and Mathematics (interims and multi-staged adaptive summative assessment).

This timeline will support Grades 3–8 Reading and Mathematics pilot administrations in the 2023–24 school year as scheduled.

As many North Carolina schools continued remote-learning or hybrid schedules throughout the 2020–21 school year, the NCDPI continued its development efforts for the North Carolina Personalized Assessment Tool system. These activities included NCDPI's partner for test development and test delivery, the Technical Outreach for Public Schools at North Carolina State University (NCSU-TOPS), and collaboration with The Friday Institute for Educational Innovation, also an entity affiliated with North Carolina State University. These partnerships, as well as the Testing and Growth Advisory that serves as a steering committee comprised of public school unit leaders, supported the NCDPI in continuing to gather input from stakeholders on the design and implementation of the NCPAT.

Row	Dates	Activities	Status (completed, in progress, delayed or deferred)	Parties Responsible
1	2020–21	<i>Develop Communication Plan</i> The IADA Team met biweekly to plan communication and outreach. The NCDPI's IADA Communication Plan included stakeholder engagement; more information is included in <i>Section IV: Consultation and Feedback</i> .	In progress	NCDPI

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2	2020–21	<p><i>Develop Professional Development Materials and Conduct Training</i></p> <p>The NCDPI’s Foundation for Assessment Literacy online course was available to educators throughout the 2020–21 school year. The course included relevant information on formative and interim assessment and data literacy.</p> <p>The NCDPI contracted with The Friday Institute for Educational Innovation to create online professional development supporting data literacy for specific audiences—namely, teachers, administrators, and instructional coaches. These online professional development courses will be available for pilot participants in the 2021–22 school year.</p>	In progress	NCDPI and The Friday Institute for Educational Innovation
3	2020–21	<p><i>NCPAT Item Development and Review</i></p> <p>Item development for statewide summative assessments in North Carolina is on-going. The NCDPI in partnership with North Carolina State University/Technical Outreach for Public Schools (NCSU-TOPS) has a well-established professional development system to recruit and train qualified teachers from across the state to serve as item writers and reviewers. NCSU-TOPS contracted with teachers to write and review new items for Grade 4 Mathematics and Grade 7 Reading that are aligned to the NCPAT content blueprint and item specifications.</p>	In progress	NCDPI and NCSU-TOPS

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		<p>In the 2020–21 school year, the NCDPI approved 366 Grade 4 Mathematics items and 150 Grade 7 Reading items to be field tested for the NCPAT.</p> <p>The NCDPI expanded the online tutorials in 2020–21 to include additional technology-enhanced items that were included in embedded field test slots in the spring 2021 operational tests.</p> <p>Item development contracts with teachers will continue in 2021–22 to expand item pools for all grade levels and content areas and to expand technology enhanced item types.</p>		
4	2020–21	<p><i>Disseminate parent communication about innovative pilot (on-going)</i></p> <p>An overview of the NCPAT pilot was posted to the NCDPI website and will be updated as new materials are developed.</p> <p>The NCDPI provided a parent communications document for cognitive lab participants.</p>	In Progress	NCDPI
5	September 2020 and March 2021	<p><i>NCPAT Analyses Plan Discussion with North Carolina Technical Advisors</i></p> <p>The NCDPI continued its discussion on the NCPAT analyses plan with the technical advisors at the September 2020 and March 2021 meetings.</p> <p>More information is included in <i>Section IV: Consultation and Feedback</i>.</p>	In progress	NCDPI and North Carolina Technical Advisors

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6	October 2020 through April 2021	<p><i>Test specifications development for Grade 7 Mathematics and Grade 4 Reading</i></p> <p>As a result of restrictions associated with COVID-19, the NCDPI's Division of Accountability Services Test Development Section was unable to facilitate in-person test specification workshops to gather input for interims during the 2020–21 school year.</p> <p>Instead, the NCDPI utilized a series of surveys to gather input from IADA program teacher and curriculum specialist participants across the state to guide recommended groupings of Grade 7 Mathematics content standards for the various Personalized Assessment Tool interims.</p> <p>Using feedback from the North Carolina Check-Ins and the seventh-grade test specification meetings for Reading, the NCDPI determined that all fourth-grade standards assessed on the end-of-grade assessment be included on each Grade 4 Reading interim.</p> <p>The finalized content interim blueprints for Grade 7 Mathematics and Grade 4 Reading were shared with all volunteers and posted to the NCDPI website.</p> <p>More information is included in <i>Section IV: Consultation and Feedback</i>.</p> <p>Note: The Grade 4 Mathematics and Grade 7 Reading test specifications were developed and shared publicly in the 2019–20 school year.</p>	Completed (COVID-19 Impact)	NCDPI
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7	January and February 2021	<p><i>Stakeholder Interviews</i></p> <p>The Friday Institute for Educational Innovation conducted sixteen interviews with thirty-one stakeholders to better understand what NCPAT pilot districts and schools perceive to be concerns and anticipated issues in transitioning from the NC Check-Ins to the NCPAT.</p> <p>More information is included in <i>Section IV: Consultation and Feedback</i>.</p>	Completed	The Friday Institute for Educational Innovation
8	March and June 2021	<p><i>Innovative Assessment Update Webinars (March 1, 2021, and June 15, 2021)</i></p> <p>The NCDPI's Division of Accountability Services hosted two IADA-specific webinars in spring 2021 providing development and timeline updates, including the agency's partnership with The Friday Institute for Educational Innovation, cognitive labs, and an overview of the interim assessments for 2021–22.</p> <p>More information is included in <i>Section IV: Consultation and Feedback</i>.</p>	Completed	NCDPI
9	April 2021	<p><i>NCPAT Interim Handbook Launch Meeting</i></p> <p>The NCDPI Accountability Services and NCSU-TOPS staff met on April 22, 2021, to share administration and form information to guide the handbook development. The NCPAT Interim Handbook will be</p>	Completed	NCDPI

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		finalized and used for training for the 2021–22 school year.		
10	April and May 2021	<p><i>Review Online Delivery System for Innovative Assessment</i></p> <p>April 2021: The NCDPI Accountability Services Leadership reviewed an online-technology enhancement list with NCSU-TOPS, including enhancements for online reporting at the classroom level and the test development system.</p> <p>May 2021: NCSU-TOPS shared its enhancement schedule with NCDPI Accountability Services staff for the 2021–22 school year.</p>	In progress	NCDPI and NCSU-TOPS
11	May 2021	<p><i>Conduct Cognitive Labs</i></p> <p>The Friday Institute for Educational Innovation conducted cognitive labs and analysis to provide the NCDPI with recommendations on the appropriateness and feasibility of expanding the current family of technology enhanced item types to statewide interim and summative assessments in Reading and Mathematics for Grades 3 through 5.</p> <p>More information is included in <i>Section IV: Consultation and Feedback</i>.</p>	Completed	The Friday Institute for Educational Innovation
12	April through June 2021	<p><i>Field tested NCPAT items on the end-of-grade test in spring 2021</i></p> <p>North Carolina included embedded field test items in its operational end-of-grade assessments for 2020–21</p>	Completed (COVID-19 Impact)	NCDPI

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		to support NCPAT interim assessment development for administrations in the 2021–22 school year in the specified grades.		
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If the innovative assessment system is not yet implemented statewide, provide a description of the SEA's progress in scaling up the system to additional LEAs or schools.

July 2020 through June 2021

The state will administer the first NCPAT interim assessments in the 2021–22 school year and expand to include the staged-adaptive summative assessments in the 2022–23 school year. Pilot participants have provided feedback through mathematics test specifications surveys, guided development through cognitive labs, and engaged in stakeholder interviews throughout the 2020–21 school year.

Participation to date has been voluntary and expanded from the initial application's two districts to include 148 schools across 14 districts as well as 8 charter schools for the 2020–21 school year. Some districts and charter schools have withdrawn from pilot participation for the 2021–22 school year, often citing local staffing and instructional development challenges in response to COVID-19. Haywood County Schools has joined the pilot for the 2021–22 school year and participation will include 59 schools across 10 districts and 6 charter schools. The NCDPI continues to seek and accept pilot volunteers statewide annually.

Noted is the participation of the Cherokee Central School (P.L. 100-297 Grant from the Bureau of Indian Affairs Department of Education). Cherokee Central School has used the North Carolina assessments since the 1990s, and it is anticipated as the North Carolina Personalized Assessment Tool is implemented statewide, it will continue its use of the statewide assessments. Their participation in the pilot will provide useful feedback and input.

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In addition, to better inform the progress of scaling up the system, please provide:

- *The list of LEAs that participated in the 2020–21 school year.*
 - *For each participating LEA, the list of participating schools in 2020–21.*
 - *For each participating school, the grade(s) and subject(s) in which the innovative assessment system was administered in 2020–21.*
 - *The list of LEAs that will participate in the 2021–22 school year.*
 - *For each participating LEA, the list of participating schools in 2021–22.*
 - *For each participating school, the grade(s) and subject(s) in which the innovative assessment system will be administered in 2021–22 (a sample of the data structure is provided below; if the list of participating LEAs and schools is long, it may be submitted as an attachment).*
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No NCPAT assessments were administered in the 2020–21 school year.

Exhibit I-01: 2020–21 IADA Development and Consultation Participation

- The “Volunteer Activity” sheet provides an overview of volunteer activity at the LEA and charter school level for the 2020–21 school year.
- The “Additional Participation” sheet provides an overview of the activity of non-pilot LEA and charter schools.

The state will administer the first NCPAT interim assessments in the 2021–22 school year; no NCPAT summative assessments will be administered.

Exhibit I-02: IADA Participation List

- The “IADA Participation List: 2020–21” sheet lists LEA (school level) and charter school participation by grade and subject for the 2020–21 school year.
- The “IADA Participation List: 2021–22” sheet lists LEA (school level) and charter school participation by grade and subject for the 2021–22 school year.

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Provide any outcomes or results from its evaluation and continuous improvement process regarding the SEA's progress in scaling up the system. This information may come from the State's annual evaluation of its IADA assessment system. The information should include how data, feedback, evaluation results, and other information are used to improve the quality of the IADA assessment system (e.g., summary report of recommended changes from teachers/principals/school leaders, summary feedback from test administrator or scorer training, summary feedback from parent meetings).

The NCDPI administered statewide summative assessments in spring 2021. These assessments included embedded field test items for Grades 4 and 7 Mathematics and Reading, supporting the first pilot NCPAT interim administrations in the 2021–22 school year. The NCDPI will use field test data from summative administrations in Spring 2022 to develop the NC Interims in Mathematics and Reading at grades 5 and 8 and the flexible summative assessments for Mathematics and Reading in grades 4, 5, 7, and 8 for the 2022–23 school year.

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II: Student Performance

Attach a report on the performance of students in participating schools at the State, LEA, and school level, for all students and disaggregated for each subgroup of students described in section 1111(c)(2) of the Act, on the innovative assessment, including academic achievement and participation data required to be reported consistent with section 1111(h) of the Act, except that such data may not reveal any personally identifiable information. Please be sure to include the subject area, the grade level(s), the number of students participating, the number of enrolled students, and % of students at each level of achievement for each school and LEA participating in the innovative assessment pilot.

Not applicable for the 2020–21 school year

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III: School Demographic Information

III.A. *If the innovative assessment system is not yet implemented statewide, attach school demographic information, including enrollment and student achievement information, for the subgroups of students described in section 1111(c)(2) of the Act, among participating schools and LEAs in the reporting year (2020-21).*

For the 2020–21 school year, only demographic information is available.

- See Exhibit III.A-01: 2020–21 Pilot Volunteer School Demographic Information

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III.B. *For any schools or LEAs that will participate for the first time in the following year (2021-22), attach school demographic information, including enrollment information, for the subgroups of students described in section 1111(c)(2) of the Act, **and describe how the participation of any additional schools or LEAs in that year contributed to progress** toward achieving high-quality and consistent implementation across demographically diverse LEAs in the State consistent with the SEA's benchmarks described in 34 CFR 200.106(a)(3)(iii).*

The NCDPI will administer NCPAT interim assessments only in the 2021–22 school year for grades 4 and 7. Both the NCPAT interims and summative assessments will be administered in the 2022–23 school year for grades 4, 5, 7, and 8.

- See Exhibit III.B-01: 2021–22 Pilot Volunteer School Demographic Information.
- Please note that the demographic information provided for this report is based on enrollment data from the 2020–21 school year. Previous enrollment demographic data is not available at all grades for schools participating in the NCPAT interims for the 2021–22 school year.

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IV: Consultation and Feedback

Describe feedback obtained during the reporting year (2020–21) from teachers, principals and other school leaders, and other stakeholders consulted, including parents and students, from participating schools and LEAs about their satisfaction with the innovative assessment system. Include a description of the method used to solicit the feedback (e.g., through surveys, focus groups, meetings) and the extent to which the feedback was solicited from each participating school and LEA.

Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
<u>Consultation.</u> Evidence that the SEA or consortium has developed an innovative assessment system in collaboration with-- (1) Experts in the planning, development, implementation, and evaluation of innovative assessment systems, which may include external partners; and	<i>North Carolina Technical Advisors</i> The NCDPI continues to consult the state's Technical Advisors on the proposed innovative system's design and measurement model; discussions in 2020–21 addressed the state's next steps in pursuing a more balanced assessment system and development challenges as a result of COVID-19. <ul style="list-style-type: none"> Exhibit IV-01: September 2020 NCTA Meeting (Day 2) Exhibit IV-02: March 2021 NCTA Meeting (Day 2) 	Exhibit IV-03: NCTA Meeting September 2020 Notes (Day 2) Exhibit IV-04: NCTA Meeting March 2021 Notes (Day 2)
	<i>North Carolina State University-Technical Outreach for Public Schools (NCSU-TOPS)</i> North Carolina has developed its assessments in partnership with the NCSU-TOPS since the early 1990s. Throughout the 2020–21 school year, the NCSU-TOPS Content and Programming teams worked with the NCDPI to support cognitive labs, test specification development, item development, programming to expand technology enhanced item	Exhibit IV-07: Mathematics Test Specification Survey Summary (PDF p. 115 and PDF p. 117)

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Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
	<p>types, and online reporting functionality for the innovative assessment pilot.</p> <ul style="list-style-type: none"> Exhibit IV-05: NC Enhancement Requests for 2021–22 Exhibit IV-06: IADA June 3, 2021 TOPS-DPI Update Meeting 	
	<p><i>The Friday Institute for Educational Innovation at North Carolina State University</i></p> <p>The NCDPI has contracted with The Friday Institute for Educational Innovation to support the state’s development of the NCPAT system and professional development resources. The NCDPI met with The Friday Institute staff throughout fall 2020 to plan stakeholder engagement interviews, cognitive labs, and online professional development course creation. The NCDPI discussed The Friday Institute’s findings and professional development course components in the January, March, and June update meetings.</p> <ul style="list-style-type: none"> Exhibit IV-08: Innovative Assessments—May 2021 Progress Update on The Friday Institute Efforts and Deliverables 	<p>The NCDPI will continue its partnership with The Friday Institute for Educational Innovation for the 2021–22 school year as outlined in Exhibit IV-09: Amended Task Order that includes professional learning content development, support materials, communication resources, and Regional Case Manager collaboration.</p>
(2) Affected stakeholders in the State, or in each State in the consortium, including-- (i) Those representing the interests of children with disabilities, English	<p><i>North Carolina State Board of Education</i></p> <p>Tammy Howard, NCDPI Director of Accountability Services, presented an update to the North Carolina State Board of Education (NCSBE) in October 2020 on the state’s</p>	<p>Exhibit IV-11: NCSBE October 2020 Meeting Minutes</p> <ul style="list-style-type: none"> PDF p. 160, 1. New Business a. North Carolina Personalized Assessment Tool Pilot Update

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Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
<p>learners, and other subgroups of students described in section 1111(c)(2) of the Act;</p> <p>(ii) Teachers, principals, and other school leaders;</p> <p>(iii) Local educational agencies (LEAs);</p> <p>(iv) Representatives of Indian tribes located in the State;</p> <p>(v) Students and parents, including parents of children described in paragraph (a)(2)(i) of this section; and</p> <p>(vi) Civil rights organizations.</p>	<p>innovative assessment design, timeline, and statewide participation.</p> <ul style="list-style-type: none"> Exhibit IV-10: NCSBE October 2020 New Business: NCPAT Update 	
	<p><i>Testing and Growth Advisory</i></p> <p>The Testing and Growth Advisory committee was established following the 2014 Summative Assessment Task Force and serves as a steering committee for the NCPAT pilot. The advisory panel includes district superintendents, test coordinators, district chief academic officers, and teachers. The NCDPI Accountability Services Division convenes the advisory biannually to review relevant developments and solicit feedback and planning advice.</p> <ul style="list-style-type: none"> Exhibit IV-12: October 23, 2020 Testing Growth Advisory Meeting Exhibit IV-13: March 24, 2021 Testing Growth Advisory Meeting 	<p><i>October 23 Feedback</i></p> <p>The members stressed the importance of the through-grade assessments' alignment to the content standards. Discussion emphasized providing feedback during the school year to support instruction.</p> <p>The relationship between the through-grade assessments and the summative assessment was noted as being key to educators and parents understanding the purpose of the NCPAT.</p> <p>As previously, some members noted the preference for the through-grade to replace the summative assessment.</p>

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Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
		<p><i>March 24 Feedback</i></p> <p>The input included (1) changing the testing windows to allow for more flexibility in administrations is strongly supported and (2) if the result of NCPAT is more testing time, it will be difficult for educators and parents to see the benefit. Members encouraged continuing to be as flexible as possible, particularly with respect to testing time and administration protocols. One member stressed it is best to ‘go slow to go fast’ as we continue with the development and implementation.</p>
	<p><i>Control Configuration Board (CCB)</i></p> <p>The NCDPI Accountability Services Division sought feedback from the CCB throughout the 2020–21 school year.</p>	<p>At the February 2021 meeting, the CCB suggested a district match and review process for online interim teacher reports; the NCDPI shared these concerns with NCSU-TOPS developers.</p> <p>At the May 2021 meeting, the CCB continued conversations on the online report release process to the teacher level. The CCB suggested to provide summative assessment reports first to administrators and then to teachers in the roll-out process. The CCB suggested teachers to access interim reports based on system data matching.</p> <p>At the June 2021 meeting, the CCB discussed a proposal for a plain paper scanning program for</p>

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Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
		assessment answer sheets (used by students whose IEP or Section 504 Plan requires a paper format). The CCB suggested a tracking system to ensure a record of all student answer sheets that are shipped, scanned, and have scores returned.
	<p><i>NCPAT Stakeholder Interviews</i></p> <p>The Friday Institute for Educational Innovation conducted sixteen interviews with thirty-one stakeholders in January and February 2021 to better understand what NCPAT pilot districts and schools perceive to be concerns and anticipated issues in transitioning from the NC Check-Ins to the NCPAT.</p>	Exhibit IV-14: Innovative Assessments Stakeholder Feedback
	<p><i>Cognitive Labs</i></p> <p>The NCDPI Annual Testing Program contracted with The Friday Institute for Educational Innovation to conduct a thorough analysis and review of its current pool of technology enhanced item types to determine if they are developmentally appropriate and accessible to the elementary student population for statewide interim and summative assessments in mathematics and reading. The NCDPI provided communication documents directed to pilot volunteer points of contact, principals, teachers, and parents of participating students. The Friday</p>	Exhibit IV-16: Innovative Assessments Cognitive Labs Feedback

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Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
	<p>Institute conducted twelve cognitive labs during May 2021.</p> <ul style="list-style-type: none"> Exhibit IV-15: NCDPI Communications for Cognitive Labs 	
	<p><i>Grade 7 Mathematics Interim Test Specifications</i> As a result of restrictions associated with COVID-19, the NCDPI's Division of Accountability Services Test Development Section was unable to facilitate an in-person test specification workshop to gather input from relevant stakeholders. Instead, a series of surveys was utilized to gather input from IADA program participants across the state. The goal of the test specification surveys was to gain input from teachers and curriculum specialists to guide recommended groupings of Grade 7 Mathematics content standards for the various Personalized Assessment Tool interims. Participants were asked to review all seventh-grade mathematics content standards and then prioritize them based on their local curriculum preferences. This feedback was used to create proposed content standard groupings for the Personalized Assessment Tool Grade 7 Mathematics interims. A follow-up survey was utilized to share the proposed content standard groupings with teachers and curriculum specialists to gauge how well the proposed groupings fit their formative assessment data needs. Results from that</p>	<p>Exhibit IV-07: Mathematics Test Specification Survey Summary</p> <p>Note: The Grade 4 Mathematics test specifications were developed and shared publicly in the 2019–20 school year.</p>

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Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
	<p>survey were used to confirm the testing specifications, as seen in Table 2. Finally, the NCDPI Test Development staff reviewed and summarized panelist recommendations to ensure alignment with other technical design specifications.</p> <ul style="list-style-type: none"> • Exhibit IV-17: Grade 7 Mathematics Interim Test Specifications Results • Exhibit IV-18: IADA Grades 4 and 7 Mathematics Interim Assessment Test Specifications 	
	<p><i>Statewide Webinars</i> <i>NC Personalized Assessment Tool Pilot Update (March 1, 2021)</i> The March webinar focused on sharing the revised NCPAT pilot timeline with the field and introducing the state’s partnership with The Friday Institute (including an overview of the cognitive lab process). One hundred forty-four participants joined the live webinar; the recording is available for all test coordinators in the state via the <i>Testing News Network</i>.</p> <ul style="list-style-type: none"> • Exhibit IV-19: March 1, 2021 Webinar <p><i>IADA Update Meeting (June 15, 2021)</i></p>	<p><i>March 1 Feedback</i> Participants inquired about the proposed NCPAT system, its timeline, and the relationship between the interim assessments and the flexible summative assessment; accountability uses for the NCPAT components; and expectations and processes for the cognitive labs. The NCDPI’s Division of Accountability Services utilized a participant poll to determine quarterly webinars are preferred by pilot participants for the 2021–22 school year.</p> <p><i>June 15 Feedback</i> Participants sought greater clarification on the distinctions between the State’s current interims, the NC Check-Ins, and the NCPAT's NC Interims;</p>

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Requirement	Description of Consultation and Feedback Methods (be sure to describe the extent of consultation and method of obtaining feedback for <i>each</i> of the listed entities in the left-hand column).	Summary of Feedback of Stakeholders (note: you may attach artifacts of the actual feedback received in lieu of providing a summary).
	<p>The June webinar provided a frame of reference on the NCDPI's journey towards a more balanced assessment system, including historical context, the state's proposed innovative design model and interim administration for the 2021–22 school year, and the next steps for the innovative pilot. One hundred sixty-eight participants joined the live webinar; the recording is available for all test coordinators across the state via the <i>Testing News Network</i>.</p> <ul style="list-style-type: none"> Exhibit IV-20: June 15, 2021 Webinar 	<p>the mathematics NC Interim content standard blueprints; the relationship between the NCPAT's NC Interims and its flexible summative assessment; and the volunteer participation process. The NCDPI responded to questions during the session and will expand further on these topics for upcoming communications in the 2021–22 school year.</p>
<p><u>Feedback on satisfaction with system.</u> Evidence that the SEA or consortium has solicited feedback on satisfaction with the system from the following groups</p> <p>(1) teachers; (2) principals and other school leaders; and (3) parents.</p>	<p>Not applicable for the 2020–21 school year.</p>	<p>The NCDPI will survey parents during the 2021–22 school year as the NC Interims are implemented.</p>

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V-A: Requirements for the Innovative Assessment System--Developing a Valid, Reliable, and Comparable System

Describe the process, procedures, or steps followed to develop a valid, reliable, and comparable innovative assessment system.

The NCDPI has developed its statewide assessments in collaboration with NCSU-TOPS since the early 1990s. The development process consistently meets industry technical standards. For the current review period, the primary test development tasks were the interim test specification blueprint and item development. Requirements not yet developed or completed are not available at this time.

Requirement	Description of Information, Summary, Process, Procedures, or Steps (be sure to describe each activity listed in the left-hand column. You may attach artifacts in lieu of providing a description.)
<p><u>Evidence that the SEA or consortium developed a valid, reliable, and comparable innovative assessment system.</u></p> <p>Report on the following information, summary, processes, procedures, or steps:</p>	
<p>(1) Process to create test specifications/blueprints to support developing IADA assessments that are technically sound and align to depth and breadth of content standards</p>	<p>As a result of restrictions associated with COVID-19, the NCDPI's Division of Accountability Services Test Development Section was unable to facilitate an in-person test specification workshop to gather input from relevant stakeholders during the 2020–21 school year. Instead, the NCDPI sought survey feedback from IADA pilot participants to recommend standards groupings for the Grade 7 Mathematics interims (see Math Test Specifications Surveys and Math Interim Test Specifications); the NCDPI relied on prior development feedback for the NC Check-Ins and Grade 7 Reading interims to include all end-of-grade assessed standards on each interim (see Reading Interim Test Specifications). Throughout this pilot phase, the NCDPI intends to collect feedback with the goal of adjusting the content specifications of the NCPAT interims. It is possible that standards listed under each interim may change before the pilot is finalized.</p>
<p>(2) IADA assessment development is guided by test specifications (e.g., purpose and intended uses; test format and length; info</p>	<p>Not applicable for the 2020–21 school year.</p>

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about content, psychometric characteristics of items and test; software and hardware requirements);	
(3) Descriptive information (e.g., feedback from item development reviews) and empirical evidence (e.g., item difficulty, item discrimination) that IADA item selection supports item specifications/blueprint;	<p>Reviewers may leave descriptive feedback on an item's alignment to objectives; intended cognitive category; assigned achievement level descriptor; bias, sensitivity, and accessibility concerns; and appropriate, plausible distractors throughout the item development process.</p> <p>Exhibit V.A-01: Test Development Process</p> <ul style="list-style-type: none"> • PDF pp. 334–339, Item Review Process
(4) Procedures to develop IADA item pool to support test specifications/blueprint (e.g., summary of crosswalk of item pool and test blueprint, algorithm used to select IADA items and how algorithm covers blueprint);	Item development for all statewide assessments in North Carolina is on-going. The NCDPI, in partnership with NCSU-TOPS, has a well-established professional development system to recruit and train qualified teachers from across the state to serve as item writers and reviewers.
(5) Summary of IADA item specifications, by subject and grade (e.g., standards or targets to be assessed; item types, response format, and scoring; cognitive complexity; level of difficulty; accessibility tools and features);	Not applicable for the 2020–21 school year.

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(6) Qualifications of item writers and reviewers (e.g., content expertise, experience);	Exhibit V.A-02: Item Writer and Reviewer Demographic Information for Mathematics and Reading at Grades 3–8 for 2020–21
(7) Instructions provided to develop and review IADA items, including instruction to align items to content standards, steps to ensure accessibility to students, and information about accessibility tools and features;	<p>Exhibit V.A-01: Test Development Process</p> <ul style="list-style-type: none"> • PDF pp. 334–339, Item Review Process <p>Exhibit V.A-03: Online Item Writer Training Sample</p> <p>NCSU-TOPS provides item writer and reviewer training to interested teachers. Prior to item writing, individuals complete a series of online modules that provide instruction on universal design principles, Plain English strategies, best practices in item development, Webb’s Depth of Knowledge cognitive framework, and grade-span content standards. The exhibit provided includes screen shots from these courses; the content course for Mathematics at Grades 3–8 was included as a representative sample.</p> <p>Following completion of the online courses, potential item writers may also attend a face-to-face training prior to signing an item-tryout contract. No face-to-face item writer trainings were held during the 2020–21 school year due to COVID-19 restrictions.</p>
(8) Procedures to ensure IADA items adhere to IADA item specifications/blueprint	N/A for the 2020–21 school year
(9) Procedures to ensure content accuracy of IADA items;	<p>Exhibit V.A-01: Test Development Process</p> <ul style="list-style-type: none"> • PDF pp. 334–339, Item Review Process: Steps 1–2, Steps 4–5, Steps 14–15, Step 18
(10) Procedures to ensure the technical adequacy of IADA items (e.g., field and operational testing, thresholds for eliminating items, differential item functioning (DIF) analysis, statements that flagged items	Not applicable for the 2020–21 school year.

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are appropriate for student subgroups);	
(11) Procedures to ensure IADA items elicit intended response processes (e.g., cognitive labs, think-aloud sessions);	Exhibit IV-16: Innovative Assessment Cognitive Labs Feedback
(12) Steps taken to consider potential bias in IADA items; (13) Steps taken to review IADA items for sensitivity and potential offensiveness (e.g., criteria for sensitivity, specifications and rules followed, list of sensitivity reviewers and expertise);	Exhibit V.A-01: Test Development Process <ul style="list-style-type: none"> • PDF pp. 334–339, Item Review Process: Steps 1–2, Steps 4–5, Steps 7–8, Steps 14–15, Step 18
(14) Procedures to ensure all major content domains or strands assessed by IADA assessment are aligned to the IADA test specifications/blueprint;	Not applicable for the 2020–21 school year.
(15) Process to reduce construct irrelevance (e.g., reduce inappropriate reading load, avoid use of idioms or culturally specific words).	Not applicable for the 2020–21 school year.

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V-B: Requirements for the Innovative Assessment System—Update on Meeting Requirements of Section 1111(b)(2)(B)

Please provide a brief report on the required elements of the Innovative Assessment System. This brief report is intended to update the State's demonstration that the innovative assessment system does or will meet the requirements of section 1111(b)(2)(B).

Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
Innovative assessment system. A demonstration that the innovative assessment system does or will--		
(2)(i) Align with the challenging State academic content standards under section 1111(b)(1) of the Act, including the depth and breadth of such standards, for the grade in which a student is enrolled; and (ii) May measure a student's academic proficiency and growth using items above or below the student's grade level so long as, for purposes of meeting the requirements for reporting and school accountability under sections 1111(c) and 1111(h) of the Act and paragraphs (b)(3) and (b)(7)-(9) of this section, the State measures each student's academic proficiency based on the challenging State academic standards for the grade in which the student is enrolled;	Interim test content blueprints for Grade 7 Mathematics and Grade 4 Reading were finalized, shared with pilot volunteers, and posted publicly on the NCDPI website. The NCPAT interims and the end of year multi-staged fixed adaptive summative assessment will be designed to collectively measure the breadth and depth of grade-level adopted content standards. Sampling techniques will be used to ensure all grade-level content standards are measured across different forms of the NCPAT assessments.	The NCDPI field-tested items for interim development only during the 2020–21 school year. The NCPAT administration of interim assessments aligned to grade-level content standards in Grade 4 Reading and Grade 7 Mathematics is planned for the 2021–22 school year.
(3) Express student results or competencies consistent with the challenging State academic achievement standards under section 1111(b)(1) of the Act and identify which students are not making sufficient progress toward, and attaining, grade-level proficiency on such standards;	Not applicable for the 2020–21 school year.	
(4)(i) Generate results, including annual summative determinations as defined in paragraph (b)(7) of this section, that are valid, reliable, and comparable for all	Not applicable for the 2020–21 school year.	

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Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
<p>students and for each subgroup of students described in 34 CFR 200.2(b)(11)(i)(A)-(I) and sections 1111(b)(2)(B)(xi) and 1111(h)(1)(C)(ii) of the Act, to the results generated by the State academic assessments described in 34 CFR 200.2(a)(1) and section 1111(b)(2) of the Act for such students.</p> <p>Include:</p> <ol style="list-style-type: none"> (1) Objective nature of IADA items machine scoring (e.g., scoring rule limits for number of errors, scoring rules for technology-enhanced score capture and validity checking, how artificial intelligence (AI) scoring engine is trained and its accuracy); (2) Procedures to transform raw IADA scores to scale scores (overall and by subtest); (3) Description of IADA equating process (overall and, if appropriate, by subtest), including equating study design, statistical methods used and person parameters, overall information functions, size and relevant characteristics of examinee samples, characteristics of anchor items/test, and accuracy of equating functions; (4) Process to equate IADA scores across academic years; (5) IADA assessment form equivalence, by grade and subject (e.g., raw scores and p-values, standard error of measurement (SEM), dimensionality, test characteristic curve (TCC), test information function (TIF), conditional standard error of measurement (CSEM), score distributions); 		

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Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
<p>(6) Indication that the TCC or TIF for all IADA tested grades and subjects is reasonable (overall and, if appropriate, by subtest);</p> <p>(7) Indication that CSEM or SEM for all IADA tested grades and subjects is reasonable (overall and, if appropriate, by subtest) (e.g., CSEM for each IADA interim assessment and final assessment for the entire scale or at cut scores, overall estimate of test error);</p> <p>(8) Reliability estimates, including:</p> <ul style="list-style-type: none"> a. Some type of reliability estimate for entire IADA student population (e.g., alpha coefficient) b. Some type of reliability estimate for each reported IADA subgroup (e.g., alpha coefficient) c. Decision consistency and accuracy reliability estimates of student classifications (based on IADA cut scores) d. Reliability estimates of correctly classified and incorrectly classified students <p>(9) Procedures to ensure use of simple language and uniform format in IADA score reports;</p> <p>(10) Availability of and access to translations who require accommodations to interpret IADA scores/results;</p> <p>(11) State generates annual State, district, and school IADA assessment reports;</p> <p>(12) Annual IADA assessment reports include student performance related to content and knowledge of assessed standards (e.g., scale scores); academic content descriptions of what students can and cannot do using achievement level descriptors</p>		

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Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
<p>(ALDs), performance level descriptors (PLDs), content knowledge learning maps or networks (e.g., subscores); and information to facilitate interpreting results and addressing specific academic needs of students (e.g., itemized score analyses);</p> <p>(13) Annual IADA student assessment reports include indicator of annual IADA proficiency or summative achievement determination; indicators of annual student progress (e.g., subscores, ALDs or PLDs, learning maps); and indicators for identifying students not making progress (e.g., subscores on student report);</p> <p>(14) Annual IADA school report includes summative achievement results disaggregated by important subgroups;</p> <p>(15) Annual IADA district and State reports, with both including summative achievement of annual progress for all IADA pilot students and for important IADA pilot student subgroups;</p> <p>(16) Expectations from State of timeline for releasing individual student IADA reports to schools and districts;</p> <p>(17) Expectations from State and district for delivering student IADA score reports to parents;</p> <p>(18) Procedures to protect security of IADA assessment personally identifiable information (e.g., staff procedures, letter to parents, scoring manual).</p> <p>Consistent with the SEA's or consortium's evaluation plan under 34 CFR 200.106(e), the SEA must plan to</p>		

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<p>annually determine comparability during each year of its demonstration authority period in one of the following ways:</p> <p>(A) Administering full assessments from both the innovative and statewide assessment systems to all students enrolled in participating schools, such that at least once in any grade span (i.e., 3-5, 6-8, or 9-12) and subject for which there is an innovative assessment, a statewide assessment in the same subject would also be administered to all such students. As part of this determination, the innovative assessment and statewide assessment need not be administered to an individual student in the same school year.</p> <p>(B) Administering full assessments from both the innovative and statewide assessment systems to a demographically representative sample of all students and subgroups of students described in section 1111(c)(2) of the Act, from among those students enrolled in participating schools, such that at least once in any grade span (i.e., 3-5, 6-8, or 9-12) and subject for which there is an innovative assessment, a statewide assessment in the same subject would also be administered in the same school year to all students included in the sample.</p> <p>(C) Including, as a significant portion of the innovative assessment system in each required grade and subject in which both an innovative and statewide assessment are administered, items or performance tasks from the statewide assessment system that, at a minimum, have been previously pilot tested or field tested for use in the statewide assessment system.</p>		
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Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
<p>(D) Including, as a significant portion of the statewide assessment system in each required grade and subject in which both an innovative and statewide assessment are administered, items or performance tasks from the innovative assessment system that, at a minimum, have been previously pilot tested or field tested for use in the innovative assessment system.</p> <p>(E) An alternative method for demonstrating comparability that an SEA can demonstrate will provide for an equally rigorous and statistically valid comparison between student performance on the innovative assessment and the statewide assessment, including for each subgroup of students described in 34 CFR 200.2(b)(11)(i)(A)-(I) and sections 1111(b)(2)(B)(xi) and 1111(h)(1)(C)(ii) of the Act;</p> <p>(ii) Generate results, including annual summative determinations as defined in paragraph (b)(7) of this section, that are valid, reliable, and comparable, for all students and for each subgroup of students described in 34 CFR 200.2(b)(11)(i)(A)-(I) and sections 1111(b)(2)(B)(xi) and 1111(h)(1)(C)(ii) of the Act, among participating schools and LEAs in the innovative assessment demonstration authority. Consistent with the SEA's or consortium's evaluation plan under 34 CFR 200.106(e), the SEA must plan to annually determine comparability during each year of its demonstration authority period;</p>		

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Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
<p>In addition to providing the information noted above, be sure to include the following information:</p> <ul style="list-style-type: none"> (1) Evidence that IADA test results are comparable to those from the non-IADA system (e.g., provide within-grade IADA and non-IADA results for participating districts are comparable, student proficiency classification for IADA and non-IADA districts are comparable in terms of complexity included in each achievement level, comparability results align with expectations outlined in State's theory of action); (2) Description of across-years scaling procedures to transform IADA raw scores to scale scores; and (3) Description of across-years IADA equating process that includes design of equating study; statistical methods used and person parameter, and overall information functions; size and relevant characteristics of examinee samples; characteristics of anchor items/test; and accuracy of equating functions. 		
<p>(5)(i) Provide for the participation of all students, including children with disabilities and English learners;</p> <p>(ii) Be accessible to all students by incorporating the principles of universal design for learning, to the extent practicable, consistent with 34 CFR 200.2(b)(2)(ii); and</p> <p>(iii) Provide appropriate accommodations consistent with 34 CFR 200.6(b) and (f)(1)(i) and section 1111(b)(2)(B)(vii) of the Act;</p>	<p>Not applicable for the 2020–21 school year.</p>	

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Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
(6) For purposes of the State accountability system consistent with section 1111(c)(4)(E) of the Act, annually measure in each participating school progress on the Academic Achievement indicator under section 1111(c)(4)(B) of the Act of at least 95 percent of all students, and 95 percent of students in each subgroup of students described in section 1111(c)(2) of the Act, who are required to take such assessments consistent with paragraph (b)(1)(ii) of this section;	Not applicable for the 2020–21 school year.	
(7) Generate an annual summative determination of achievement, using the annual data from the innovative assessment, for each student in a participating school in the demonstration authority that describes-- (i) The student’s mastery of the challenging State academic standards under section 1111(b)(1) of the Act for the grade in which the student is enrolled; or (ii) In the case of a student with the most significant cognitive disabilities assessed with an alternate assessment aligned with alternate academic achievement standards under section 1111(b)(1)(E) of the Act, the student’s mastery of those standards;	Not applicable for the 2020–21 school year.	
(8) Provide disaggregated results by each subgroup of students described in 34 CFR 200.2(b)(11)(i)(A)-(I) and sections 1111(b)(2)(B)(xi) and 1111(h)(1)(C)(ii) of the Act, including timely data for teachers, principals and other school leaders, students, and parents consistent with 34 CFR 200.8 and section 1111(b)(2)(B)(x) and (xii) and section 1111(h) of the Act, and provide results	Not applicable for the 2020–21 school year.	

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Regulatory Requirement	Accomplishments in the Reporting Year (2020-21).	Explanation of Delays or Concerns, with a description of a plan to resolve the concern (if applicable).
to parents in a manner consistent with paragraph (b)(4)(i) of this section and part 200.2(e);		
<p>(9) Provide an unbiased, rational, and consistent determination of progress toward the State’s long-term goals for academic achievement under section 1111(c)(4)(A) of the Act for all students and each subgroup of students described in section 1111(c)(2) of the Act and a comparable measure of student performance on the Academic Achievement indicator under section 1111(c)(4)(B) of the Act for participating schools relative to non-participating schools so that the SEA may validly and reliably aggregate data from the system for purposes of meeting requirements for--</p> <p>(i) Accountability under sections 1003 and 1111(c) and (d) of the Act, including how the SEA will identify participating and non-participating schools in a consistent manner for comprehensive and targeted support and improvement under section 1111(c)(4)(D) of the Act; and</p> <p>(ii) Reporting on State and LEA report cards under section 1111(h) of the Act.</p>	Not applicable for the 2020–21 school year.	

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VI: Training on and Familiarization with the Innovative Assessment System

Describe training provided to teachers, principals and other school leaders, and other stakeholders during the reporting year (2020-21) to implement the innovative assessment system, including the standard administration of the innovative assessments.

Requirement	Description of Training (be sure to describe the training provided for each activity listed in the left-hand column. You may attach artifacts of the training in lieu of providing a description).
<p><u>Training.</u> Evidence that the SEA or consortium provided training or instructions for standard administration of the innovative assessment system on each of the following activities:</p> <ul style="list-style-type: none"> (1) Standard procedures for administering the IADA assessments (e.g., manual, slides); (2) Administering IADA assessment supports and accommodations to students with disabilities; (3) Administering IADA assessment supports and accommodations to English learners; (4) Hand-scoring constructed responses or essays (e.g., results of exact, adjacent, and discrepant agreement; validity check results; number of read-behind flags); (5) Handling test irregularities during IADA assessment administrations (e.g., test security handbook, test security plan, reports of internal or independent monitoring procedures); (6) Conducting external reviewing of IADA items for potential bias (e.g., criteria for review, steps where potential bias is considered, review by external review committee); 	<p>Not applicable for the 2020–21 school year.</p>

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Requirement	Description of Training (be sure to describe the training provided for each activity listed in the left-hand column. You may attach artifacts of the training in lieu of providing a description).
(7) Reviewing IADA items for sensitivity and potential offensiveness (e.g., criteria for review, specifications and rules followed, list of reviewers and expertise); (8) Protecting IADA-related personally identifiable information (PII).	

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For each of the training topics below, briefly describe all training opportunities that your State provided for teachers, principals, and other school leaders during the reporting year (2020-21). For each training opportunity, report the number of individuals eligible to participate and the number of individuals who actually participated.

Training for the NCPAT interims will begin in the 2021–22 school year.

During the 2020–21 school year, the NCDPI contracted with The Friday Institute for Educational Innovation to develop online professional development modules to support data literacy and NCPAT interim implementation at the classroom level. The courses are designed with content for specific audiences—namely teachers, administrators, and instructional coaches.

The NCDPI will provide a NCPAT Interim Handbook for the 2021–22 school year that will outline administration policies and best practices.

A sample data template is provided below. If the data list is long, this may be submitted as an attachment.

Training Topic	Brief Description of Training Opportunity, Including How Eligibility for the Training was Defined. (You may attach artifacts of the training in lieu of providing a description, such as training slides, sections, or an entire manual).	Number of Eligible Participants by Type (teachers, principals, other school leaders).	Number of Actual Participants by Type (teachers, principals, other school leaders).
(1) Training to familiarize teachers or school staff with the innovative assessment system (e.g., training on goals of innovative assessment system design including alignment to State standards for student learning, highlights of the key differences between the new and existing assessment systems, format, timeline for administration, and reporting)	Not applicable for the 2020–21 school year.		

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Training Topic	Brief Description of Training Opportunity, Including How Eligibility for the Training was Defined. (You may attach artifacts of the training in lieu of providing a description, such as training slides, sections, or an entire manual).	Number of Eligible Participants by Type (teachers, principals, other school leaders).	Number of Actual Participants by Type (teachers, principals, other school leaders).
(2) Training on test security for the innovative assessment system (e.g., training on handling and distribution of innovative assessment materials, monitoring administration of innovative assessments)	Not applicable for the 2020–21 school year.		
(3) Training on providing accommodations for students with disabilities in the innovative assessment system (e.g., training on specific types of accommodations that can be made in the presentation, response, timing and/or setting of the innovative assessment to support participation of students with disabilities)	Not applicable for the 2020–21 school year.		
(4) Training on providing accommodations for English learner (EL) students in the innovative system (e.g., training on specific types of accommodations that can be made in the presentation, response, timing and/or setting of the innovative assessment to	Not applicable for the 2020–21 school year.		

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Training Topic	Brief Description of Training Opportunity, Including How Eligibility for the Training was Defined. (You may attach artifacts of the training in lieu of providing a description, such as training slides, sections, or an entire manual).	Number of Eligible Participants by Type (teachers, principals, other school leaders).	Number of Actual Participants by Type (teachers, principals, other school leaders).
support participation of EL students)			
(5) Training on using innovative assessment data to inform instruction (e.g., training on analysis and interpretation of individual, subgroup, and/or class-level data for the purposes of identifying struggling students; checking student mastery; adapting instructional resources and/or pacing; differentiating instruction; changing instructional strategies)	Not applicable for the 2020–21 school year.		
(6) Training on using innovative assessments for accountability (e.g., training on analysis and interpretation of class and grade- level data for the purposes of informing curricular decisions and allocation of resources to support instruction at the school)	Not applicable for the 2020–21 school year.		
(7) Training on using innovative assessments for accountability across student subgroups (e.g.,	Not applicable for the 2020–21 school year.		

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Training Topic	Brief Description of Training Opportunity, Including How Eligibility for the Training was Defined. (You may attach artifacts of the training in lieu of providing a description, such as training slides, sections, or an entire manual).	Number of Eligible Participants by Type (teachers, principals, other school leaders).	Number of Actual Participants by Type (teachers, principals, other school leaders).
training on analysis and interpretation of subgroup, class, and grade-level data for the purposes of identifying and addressing any gaps between student subgroups)			

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Describe how the SEA or consortium familiarized students, parents, and LEA staff with the innovative assessment system during the reporting year (2020-21). Familiarization may include sharing a description of the new innovative assessment system, highlights of the key differences between the innovative and existing assessment systems, initial challenges associated with implementing the new system, and benefits of the innovative assessment system. Examples of familiarizing students and parents include materials that were sent to parents describing the innovative assessment system, agendas of meetings with parents and students to describe the innovative assessment system, and postings about the innovative assessment system on schools'/districts' websites. Examples of familiarizing LEA staff include materials from meetings to describe the innovative assessment system, agendas and materials from trainings for staff on implementing the innovative assessment system.

The focus of this section is twofold: (a) information the State or consortium provided to students and parents to familiarize them with and acclimate them to the innovative assessment system and (b) support and training the State or consortium provided to LEA staff to familiarize and enable them to implement the innovative assessment system. Familiarizing students, parents, and LEA staff goes beyond the basic parental notification requirement in Section IX.

SEA or Consortium Takes Action to Familiarize the Following Individuals with the Innovative Assessment System	Description of (a) the Process the State or Consortium used to Familiarize and Acclimate Students and Parents to the Innovative Assessment System and (b) the Support and Training the State or Consortium Provided to LEA Staff to Implement the Innovative Assessment System (be sure to describe the process for each group listed in the left-hand column. You may attach artifacts [e.g., letter to parents, practice IADA items, meeting or training agenda, training session manual/materials] of the actual process in lieu of providing a description).
(1) Familiarize and acclimate students and parents to the IADA assessment system	Not applicable for the 2020–21 school year.
(2) Support and train LEA and school staff to implement the IADA assessment system and administer the IADA assessments	Not applicable for the 2020–21 school year.

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VII: Use of Innovative Assessment Data

Please describe how teachers, principals, and other school leaders are using the innovative assessment data during the reporting year (2020-21). You may attach artifacts in lieu of providing a description.

In particular:

To the extent the SEA has tracked teacher participation in activities that involve using innovative assessment data to inform instruction, report the percentage of participating teachers who have engaged in these activities. Examples of activities include using the data to identify struggling students, check student mastery, group students to deliver differentiated instruction, or change the pacing of lessons. Note that teachers may participate in activities using assessment data to inform instruction either individually or in teams.

To the extent the SEA has tracked principal and other school leader participation in activities that involve using innovative assessment data to improve accountability, report the percentage of participating principals and other school leaders who have engaged in these activities. Examples of activities include monitoring students' participation rates, evaluation of interim progress against long-term school improvement goals, root cause analysis, action planning, or identifying and addressing gaps between student subgroups.

Not applicable for the 2020–21 school year.

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VIII: Changes in Consortium Governance or Membership (if applicable).

Describe any changes in the Consortium governance structure, roles and responsibilities, or membership, during the reporting year (2020-21), or any changes anticipated in the future.

Not applicable for the 2020–21 school year

IX: Parental Notification

*Describe how the SEA or Consortium is ensuring that each participating LEA informs parents of all students in participating schools about the innovative assessment, including the grades and subjects in which the innovative assessment will be administered, and, consistent with section 1112(e)(2)(B) of the Act, **at the beginning of each school year** during which an innovative assessment will be implemented. Such information must be--*

- (i) In an understandable and uniform format;*
- (ii) To the extent practicable, written in a language that parents can understand or, if it is not practicable to provide written translations to a parent with limited English proficiency, be orally translated for such parent; and*
- (iii) Upon request by a parent who is an individual with a disability as defined by the Americans with Disabilities Act, provided in an alternative format accessible to that parent.*

N/A for the 2020–21 school year

X: Assurances

If the innovative assessment system will initially be administered in a subset of LEAs or schools in a State, please attach an assurance from the SEA that affirms it has collected assurances from each participating LEA that the LEA will comply with all requirements of this section.

See Exhibit X-01: Assurances

XI: Budget

Please describe any changes to the budget that vary from the approved application budget.

There were no budget changes in the 2020–21 school year.

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XII: Certification

To the best of my knowledge and belief, all data in this annual performance report are true and correct and the report fully discloses all known weaknesses concerning the accuracy, reliability, and completeness of the data.

Name of Authorized Representative:

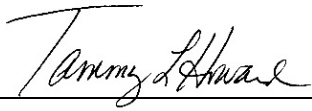
Title:

Tammy L. Howard

Director of Accountability
Services

Signature:

Date (*month/day/year*):



August 30, 2021

North Carolina Annual Performance Report 2020–21 Appendix

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Part I Appendices

Exhibit I-01: 2020–21 IADA Development and Consultation Participation

2020–21 IADA DEVELOPMENT AND CONSULTATION PARTICIPATION: VOLUNTEER ACTIVITY										
SBE REGION	LEA CODE	LEA/CHARTER NAME	2020–21 PILOT VOLUNTEER R	Testing Growth Advisory	CCB	Grade 7 Math Test Specification Surveys	Stakeholder Interviews	March 1, 2021 Webinar	Cognitive Labs	June 15, 2021 Webinar
Northwest	140	Caldwell County Schools	Yes	X	X			X		X
Western	209	Cherokee Central Schools (Federal)	Yes				X	X	X	X
Sandhills	295	Innovative School District	Yes				X	X		
Southwest	360	Gaston County Schools	Yes			X		X		X
North Central	390	Granville County Schools	Yes			X	X	X	X	
Southeast	400	Greene County Schools	Yes		X	X	X	X		X
Southwest	491	Mooresville Graded School District	Yes							X
North Central	510	Johnston County Schools	Yes			X	X	X		X
Sandhills	620	Montgomery County Schools	Yes	X		X	X	X		X
Southeast	650	New Hanover Schools	Yes			X	X	X		X
Sandhills	770	Richmond County Schools	Yes							
Southwest	800	Rowan-Salisbury Schools	Yes	X		X	X	X		
Sandhills	830	Scotland County Schools	Yes			X	X		X	X
Northeast	940	Washington County Schools	Yes				X	X		X
Northwest	950	Watagua Schools	Yes			X	X	X	X	X
Sandhills	26B	Alpha Academy Charter	Yes			X	X			X
Southwest	13B	Cabarrus Charter Academy	Yes							
Southeast	65Z	D.C. Virgo Preparatory School	Yes			X	X			
North Central	39A	Falls Lake Academy	Yes			X		X		X
Piedmond Triad	34F	Forsyth Academy	Yes			X	X	X		
Southwest	60Q	Invest Collegiate	Yes					X		X
Sandhills	63A	The Academy of Moore County	Yes				X	X	X	
Sandhills	60B	Sugar Creek Charter School	Yes			X	X		X	
Southwest	61K	United Community School	Yes					X		

2020–21 IADA DEVELOPMENT AND CONSULTATION PARTICIPATION: ADDITIONAL PARTICIPATION										
SBE REGION	LEA CODE	LEA/CHARTER NAME	2020–21 PILOT VOLUNTEER	Testing Growth Advisory	CCB	Grade 7 Math Test Specification Surveys	Stakeholder Interviews	March 1, 2021 Webinar	Cognitive Labs	June 15, 2021 Webinar
North Central	430	Harnett County Schools	No					X		X
Southwest	840	Stanly County Schools	No					X		X
Western	870	Swain County Schools	No							X
Northeast	74C	Winterville Charter Academy	No							X
Southeast	100	Brunswick County Schools	No					X		X
Northwest	20	Alexander County Schools	No					X		X
North Central	640	Nash County Schools	No		X			X		X
Western	220	Clay Schools	No					X		
Western	110	Buncombe County Schools	No	X				X		X
Northeast	70	Beaufort County Schools	No	X	X			X		X
Southeast	670	Onslow County Schools	No	X				X		
Northeast	580	Martin County Schools	No					X		X
North Central	73B	Roxboro Community School	No					X		X
Southwest	600	Charlotte-Mecklenberg Schools	No	X	X			X		X
Piedmont Triad	10	Alamance-Burlington Schools	No					X		X
Southeast	310	Duplin County Schools	No					X		X
Southeast	160	Carteret County Schools	No					X		X
North Central	92F	Franklin Academy	No					X		X
Southeast	540	Lenoir County Schools	No					X		
Southwest	550	Lincoln County Schools	No	X				X		
North Central	190	Chatham County Schools	No					X		X
Piedmont Triad	340	Winston-Salem Forsyth County Schools	No					X		X
Western	440	Haywood County Schools	No					X		X
North Central	330	Edgecombe County Public Schools	No					X		X
Piedmont Triad	760	Randolph County Schools	No					X		X
Northeast	150	Camden County Schools	No					X		
Southwest	36B	Piedmont Community Charter School	No					X		
North Central	530	Lee County Schools	No					X		
North Central	920	Wake County Public Schools	No	X	X			X		X
Piedmont Triad	761	Asheboro City Schools	No					X		X
Southeast	520	Jones County Schools	No					X		X
North Central	93A	Haliwa-Saponi Tribal School	No					X		X

2020–21 IADA DEVELOPMENT AND CONSULTATION PARTICIPATION: ADDITIONAL PARTICIPATION										
SBE REGION	LEA CODE	LEA/CHARTER NAME	2020–21 PILOT VOLUNTEER	Testing Growth Advisory	CCB	Grade 7 Math Test Specification Surveys	Stakeholder Interviews	March 1, 2021 Webinar	Cognitive Labs	June 15, 2021 Webinar
Northeast	740	Pitt County Schools	No					X		X
Sandhills	24B	Thomas Academy	No					X		X
Southwest	49G	Iredell Charter Academy	No					X		X
North Central	910	Vance County Schools	No	X				X		X
Sandhills	780	Robeson County Schools	No		X			X		
North Central	73A	Bethel Hill Charter School	No					X		
Piedmont Triad	292	Thomasville City Schools	No					X		X
Western	810	Rutherford County Schools	No					X		
Sandhills	630	Moore County Schools	No					X		X
Northeast	720	Perquimans County Schools	No					X		X
Piedmont Triad	410	Guilford County Schools	No			X		X		X
Piedmont Triad	862	Mount Airy City Schools	No	X				X		X
North Central	680	Orange County Schools	No					X		
NC Virtual Academy	00B	NC Virtual Academy	No					X		X
Southwest	13A	Carolina International School	No					X		X
Northeast	58B	Bear Grass Charter School	No		X			X		
Western	450	Henderson County Public Schools	No					X		
Northwest	120	Burke County Schools	No					X		X
North Central	92Y	Envision Science Academy	No					X		
Northwest	182	Newton-Conover City Schools	No					X		
Sandhills	240	Columbus County Schools	No					X		
Piedmont Triad	41K	Piedmont Classical	No					X		X
Southeast	96F	Wayne Preparatory Academy	No					X		
Northwest	50	Ashe County Schools	No					X		X
North Central	980	Wilson County Schools	No					X		X
Southwest	230	Cleveland County Schools	No	X	X			X		X
Northwest	181	Hickory City Schools	No		X			X		X
Southwest	130	Cabarrus County Schools	No					X		X
Southwest	132	Kannapolis City Schools	No					X		X
Southwest	900	Union County Public Schools	No					X		X
Southwest	490	Iredell-Statesville Schools	No					X		X
Southwest	60D	Lake Norman Charter Academy	No		X			X		

2020–21 IADA DEVELOPMENT AND CONSULTATION PARTICIPATION: ADDITIONAL PARTICIPATION										
SBE REGION	LEA CODE	LEA/CHARTER NAME	2020–21 PILOT VOLUNTEER	Testing Growth Advisory	CCB	Grade 7 Math Test Specification Surveys	Stakeholder Interviews	March 1, 2021 Webinar	Cognitive Labs	June 15, 2021 Webinar
Southwest	36G	Community Public Charter School	No					X		X
Southwest	49E	Pine Lake Preparatory	No					X		X
Northwest	180	Catawba County Schools	No					X		X
Southwest	60S	Bradford Preparatory School	No					X		X
Piedmont Triad	34D	Carter G. Woodson School	No					X		
Sandhills	470	Hoke County Schools	No	X	X			X		
Piedmont Triad	860	Surry County Schools	No					X		
Sandhills	260	Cumberland County Schools	No	X	X			X		X
Piedmont Triad	291	Lexington City Schools	No					X		X
Northwest	60	Avery County Schools	No	X				X		X
Northeast	890	Tyrrell County Schools	No					X		
Western	81A	Thomas Jefferson Classical Academy	No					X		X
Northwest	970	Wilkes County Schools	No					X		X
Western	570	Madison County Schools	No					X		
North Central	32L	Voyager Academy	No					X		
Western	750	Polk County Schools	No					X		
Piedmont Triad	990	Yadkin County Schools	No					X		
Piedmont Triad	300	Davie County Schools	No	X				X		
North Central	92G	East Wake Academy	No					X		
Northeast	70A	Northeast Academy for Aerospace and Advanced Technologies	No					X		
Western	500	Jackson County	No		X					X
North Central	39B	Oxford Preparatory	No		X					
Western	380	Graham County Schools	No		X					
Northeast	280	Dare County Schools	No		X					
North Central	730	Person County Schools	No							X
Southeast	16B	Tiller School	No							X
Sandhills	821	Clinton City Schools	No							X
Piedmont Triad	790	Rockingham County Schools	No	X						X
Southeast	65D	Island Montessori School	No							X
Western	111	Asheville City Schools	No							X
Sandhills	90	Bladen County Schools	No							X

2020–21 IADA DEVELOPMENT AND CONSULTATION PARTICIPATION: ADDITIONAL PARTICIPATION										
SBE REGION	LEA CODE	LEA/CHARTER NAME	2020–21 PILOT VOLUNTEER	Testing Growth Advisory	CCB	Grade 7 Math Test Specification Surveys	Stakeholder Interviews	March 1, 2021 Webinar	Cognitive Labs	June 15, 2021 Webinar
Northeast	80	Bertie County Schools	No							X
Northeast	700	Elizabeth City-Pasquotank Public Schools	No							X
North Central	00A	North Carolina Cyber Academy	No							X
North Central	98A	Sallie B. Howard School	No							X
Southeast	65F	Coastal Preparatory Academy	No							X
Sandhills	26C	Capitol Encore Academy	No							X
Southeast	69A	Arapahoe Charter School	No							X
Northwest	590	McDowell County Schools	No							X
Piedmont Triad	34B	Quality Education Academy	No							X
Northeast	422	Weldon City Schools	No							X
North Central	32P	The Institute for the Development of Young Leaders	No							X
Southeast	65G	Girls Leadership Academy of Wilmington	No							X
Northeast	480	Hyde County Schools	No							X
Piedmont Triad	850	Stokes County Schools	No							X
Southeast	690	Pamlico County Schools	No							X
North Central	320	Durham County Schools	No							X
Piedmont Triad	01C	Clover Garden School	No							X
Southwest	55A	Lincoln Charter School	No	X						

Exhibit I-02: IADA Participation List

IADA PARTICIPATION LIST: 2020–21						
SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 READING
Northwest	140	Caldwell County Schools	140304	Baton Elementary	Yes	No
Northwest	140	Caldwell County Schools	140308	Collettsville School	Yes	Yes
Northwest	140	Caldwell County Schools	140312	Davenport A+ School	Yes	No
Northwest	140	Caldwell County Schools	140316	Dudley Shoals Elementary	Yes	No
Northwest	140	Caldwell County Schools	140324	Gamewell Elementary	Yes	No
Northwest	140	Caldwell County Schools	140332	Gamewell Middle	No	Yes
Northwest	140	Caldwell County Schools	140306	Gateway School	No	Yes
Northwest	140	Caldwell County Schools	140324	Granite Falls Elementary	Yes	No
Northwest	140	Caldwell County Schools	140336	Granite Falls Middle	No	Yes
Northwest	140	Caldwell County Schools	140344	Happy Valley Elementary	Yes	Yes
Northwest	140	Caldwell County Schools	140307	Horizons Elementary	Yes	No
Northwest	140	Caldwell County Schools	140352	Hudson Elementary	Yes	No
Northwest	140	Caldwell County Schools	140356	Hudson Middle	No	Yes
Northwest	140	Caldwell County Schools	140360	Kings Creek Elementary	Yes	Yes
Northwest	140	Caldwell County Schools	140372	Lower Creek Elementary	Yes	No
Northwest	140	Caldwell County Schools	140376	Oak Hill Elementary	Yes	Yes
Northwest	140	Caldwell County Schools	140384	Sawmills Elementary	Yes	No
Northwest	140	Caldwell County Schools	140392	West Lenoir Elementary	Yes	No
Northwest	140	Caldwell County Schools	140396	Whitnel Elementary	Yes	No
Northwest	140	Caldwell County Schools	140368	William Lenoir Middle	No	Yes
Western	209	Cherokee Central Schools (Federal)	209208	Cherokee Elementary	Yes	No
Western	209	Cherokee Central Schools (Federal)	209206	Cherokee Middle	No	Yes
Sandhills	295	Innovative School District	295300	Southside Ashpole	Yes	No
Southwest	360	Gaston County Schools	360320	Belmont Central Elementary	Yes	No
Southwest	360	Gaston County Schools	360324	Belmont Middle	No	Yes
Southwest	360	Gaston County Schools	360332	Bessemer City Central Elem	Yes	No
Southwest	360	Gaston County Schools	360436	Bessemer City Middle	No	Yes
Southwest	360	Gaston County Schools	360340	Brookside Elementary	Yes	No

IADA PARTICIPATION LIST: 2020–21						
SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 READING
Southwest	360	Gaston County Schools	360344	Carr Elementary	Yes	No
Southwest	360	Gaston County Schools	360348	Catawba Heights Elementary	Yes	No
Southwest	360	Gaston County Schools	360352	Chapel Grove Elementary	Yes	No
Southwest	360	Gaston County Schools	360364	Cherryville Elementary	Yes	No
Southwest	360	Gaston County Schools	360376	Costner Elementary	Yes	No
Southwest	360	Gaston County Schools	360380	Cramerton Middle	No	Yes
Southwest	360	Gaston County Schools	360392	Edward D Sadler Jr Elementary School	Yes	No
Southwest	360	Gaston County Schools	360400	Gardner Park Elementary	Yes	No
Southwest	360	Gaston County Schools	360550	Gaston Virtual Academy	Yes	Yes
Southwest	360	Gaston County Schools	360492	H H Beam Elementary	Yes	No
Southwest	360	Gaston County Schools	360420	Hawks Nest STEAM Academy	Yes	No
Southwest	360	Gaston County Schools	360426	Holbrook Middle	No	Yes
Southwest	360	Gaston County Schools	360482	Ida Rankin Elementary School	Yes	No
Southwest	360	Gaston County Schools	360431	John Chavis Middle School	No	Yes
Southwest	360	Gaston County Schools	360432	Kiser Elementary	Yes	No
Southwest	360	Gaston County Schools	360438	Lingerfeldt Elementary	Yes	No
Southwest	360	Gaston County Schools	360440	Lowell Elementary	Yes	No
Southwest	360	Gaston County Schools	360448	McAdenville Elementary	Yes	No
Southwest	360	Gaston County Schools	360456	Mount Holly Middle	No	Yes
Southwest	360	Gaston County Schools	360464	New Hope Elementary	Yes	No
Southwest	360	Gaston County Schools	360468	North Belmont Elementary	Yes	No
Southwest	360	Gaston County Schools	360478	Pinewood Elementary	Yes	No
Southwest	360	Gaston County Schools	360480	Pleasant Ridge Elementary	Yes	No
Southwest	360	Gaston County Schools	360488	Robinson Elementary	Yes	No
Southwest	360	Gaston County Schools	360490	Sherwood Elementary	Yes	No
Southwest	360	Gaston County Schools	360498	Southwest Middle	No	Yes
Southwest	360	Gaston County Schools	360500	Stanley Middle	No	Yes

IADA PARTICIPATION LIST: 2020–21						
SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 READING
Southwest	360	Gaston County Schools	360504	Tryon Elementary	Yes	No
Southwest	360	Gaston County Schools	360510	W A Bess Elementary School	Yes	No
Southwest	360	Gaston County Schools	360339	W B Beam Intermediate School	Yes	No
Southwest	360	Gaston County Schools	360514	W C Friday Middle School	No	Yes
Southwest	360	Gaston County Schools	360408	W P Grier Middle School	No	Yes
Southwest	360	Gaston County Schools	360372	Warlick Academy	No	Yes
Southwest	360	Gaston County Schools	360520	Woodhill Elementary	Yes	No
North Central	390	Granville County Schools	390320	G. C. Hawl Middle	No	Yes
North Central	390	Granville County Schools	390362	Tar River Elementary	Yes	No
Southeast	400	Greene County Schools	400318	Greene County Intermediate	Yes	No
Southeast	400	Greene County Schools	400312	Greene County Middle	No	Yes
Southwest	491	Mooreville Graded School District	491308	Mooreville Middle	No	Yes
North Central	510	Johnston County Schools	510328	Cleveland Elementary	Yes	No
North Central	510	Johnston County Schools	510329	Cleveland Middle	No	Yes
North Central	510	Johnston County Schools	510396	West Smithfield Elementary	Yes	No
North Central	510	Johnston County Schools	510414	West View Elementary	Yes	No
Sandhills	620	Montgomery County Schools	620312	Candor Elementary	Yes	No
Sandhills	620	Montgomery County Schools	620314	East Middle	No	Yes
Sandhills	620	Montgomery County Schools	620318	Green Ridge Elementary	Yes	No
Sandhills	620	Montgomery County Schools	620310	Montgomery Learning Academy	No	Yes
Sandhills	620	Montgomery County Schools	620324	Mount Gilead Elementary	Yes	No
Sandhills	620	Montgomery County Schools	620330	Page Street Elementary	Yes	No
Sandhills	620	Montgomery County Schools	620334	Star Elementary	Yes	No
Sandhills	620	Montgomery County Schools	620339	West Middle	No	Yes
Southeast	650	New Hanover Schools	650308	Carolina Beach Elementary School	Yes	No
Southeast	650	New Hanover Schools	650325	Emma Trask Middle School	No	Yes
Southeast	650	New Hanover Schools	650339	Holly Tree Elementary School	Yes	No
Southeast	650	New Hanover Schools	650356	Ogden Elementary School	Yes	No

IADA PARTICIPATION LIST: 2020–21						
SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 READING
Southeast	650	New Hanover Schools	650380	Walter Parsley Elementary School	Yes	No
Sandhills	770	Richmond County Schools	770364	Cordova Middle	No	Yes
Sandhills	770	Richmond County Schools	770310	East Rockingham Elementary	Yes	No
Sandhills	770	Richmond County Schools	770316	Ellerbe Middle	No	Yes
Sandhills	770	Richmond County Schools	770318	Fairview Heights Elementary	Yes	No
Sandhills	770	Richmond County Schools	770328	Hamlet Middle	No	Yes
Sandhills	770	Richmond County Schools	770340	L J Bell Elementary	Yes	No
Sandhills	770	Richmond County Schools	770344	Mineral Springs Elementary	Yes	No
Sandhills	770	Richmond County Schools	770346	Monroe Avenue Elementary	Yes	No
Sandhills	770	Richmond County Schools	770360	Rockingham Middle	No	Yes
Sandhills	770	Richmond County Schools	770370	Washington Street Elementary	Yes	No
Sandhills	770	Richmond County Schools	770368	West Rockingham Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800312	Bostian Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800316	China Grove Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800320	China Grove Middle	No	Yes
Southwest	800	Rowan-Salisbury Schools	800328	Corriher Lipe Middle	No	Yes
Southwest	800	Rowan-Salisbury Schools	800359	Dole Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800348	Enochville Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800314	Erwin Middle	No	Yes
Southwest	800	Rowan-Salisbury Schools	800352	Faith Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800356	Granite Quarry Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800360	Hurley Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800358	Isenberg Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800362	Knollwood Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800363	Knox Middle	No	Yes
Southwest	800	Rowan-Salisbury Schools	800346	Koontz Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800364	Landis Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800366	Millbridge Elementary	Yes	No

IADA PARTICIPATION LIST: 2020-21

SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 READING
Southwest	800	Rowan-Salisbury Schools	800368	Morgan Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800372	Mt Ulla Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800373	North Rowan Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800377	North Rowan Middle	No	Yes
Southwest	800	Rowan-Salisbury Schools	800315	Overton Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800392	Rockwell Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800347	Shive Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800398	Southeast Middle	No	Yes
Southwest	800	Rowan-Salisbury Schools	800406	West Rowan Elementary	Yes	No
Southwest	800	Rowan-Salisbury Schools	800410	West Rowan Middle	No	Yes
Sandhills	830	Scotland County Schools	830304	Carver Middle School	No	Yes
Sandhills	830	Scotland County Schools	830320	I E Johnson Elementary	Yes	No
Sandhills	830	Scotland County Schools	830328	Laurel Hill Elementary	Yes	No
Sandhills	830	Scotland County Schools	830316	Shaw Academy	No	Yes
Sandhills	830	Scotland County Schools	830356	South Scotland Elementary	Yes	No
Sandhills	830	Scotland County Schools	830349	Spring Hill Middle	No	Yes
Sandhills	830	Scotland County Schools	830364	Sycamore Lane Elementary	Yes	No
Sandhills	830	Scotland County Schools	830360	Wagram Elementary	Yes	No
Northeast	940	Washington County Schools	940306	Creswell Elementary	Yes	No
Northeast	940	Washington County Schools	940314	Pines Elementary	Yes	No
Northeast	940	Washington County Schools	940328	Washington County Middle	No	Yes
Northwest	950	Watagua Schools	950308	Bethel Elementary	Yes	Yes
Northwest	950	Watagua Schools	950312	Blowing Rock Elementary	Yes	Yes
Northwest	950	Watagua Schools	950316	Cove Creek Elementary	Yes	Yes
Northwest	950	Watagua Schools	950320	Green Valley Elementary	Yes	Yes
Northwest	950	Watagua Schools	950322	Hardin Park Elementary	Yes	Yes
Northwest	950	Watagua Schools	950324	Mabel Elementary	Yes	Yes
Northwest	950	Watagua Schools	950328	Parkway Elementary	Yes	Yes

IADA PARTICIPATION LIST: 2020–21						
SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 READING
Northwest	950	Watagua Schools	950332	Valle Crucis Elementary	Yes	Yes
Sandhills	26B	Alpha Academy Charter	26B	Alpha Academy Charter	Yes	Yes
Southwest	13B	Cabarrus Charter Academy	13B	Cabarrus Charter Academy	Yes	Yes
Southeast	65Z	D.C. Virgo Preparatory School	65Z	D.C. Virgo Preparatory School	Yes	Yes
North Central	39A	Falls Lake Academy	39A	Falls Lake Academy	Yes	Yes
Piedmond Triad	34F	Forsyth Academy	34F	Forsyth Academy	Yes	Yes
Southwest	60Q	Invest Collegiate	60Q	Invest Collegiate	Yes	Yes
Sandhills	63A	The Academy of Moore County	63A	The Academy of Moore County	Yes	No
Sandhills	26B	Sugar Creek Charter School	26B	Sugar Creek Charter School	No	Yes

IADA PARTICIPATION LIST: 2021-22

SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 MATH	GRADE 4 READING	GRADE 7 READING
Northwest	140	Caldwell County Schools	140304	Baton Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140308	Collettsville School	Yes	Yes	Yes	Yes
Northwest	140	Caldwell County Schools	140312	Davenport A+ School	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140316	Dudley Shoals Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140324	Gamewell Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140332	Gamewell Middle	No	Yes	No	Yes
Northwest	140	Caldwell County Schools	140306	Gateway School	No	Yes	No	Yes
Northwest	140	Caldwell County Schools	140324	Granite Falls Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140336	Granite Falls Middle	No	Yes	No	Yes
Northwest	140	Caldwell County Schools	140344	Happy Valley Elementary	Yes	Yes	Yes	Yes
Northwest	140	Caldwell County Schools	140307	Horizons Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140352	Hudson Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140356	Hudson Middle	No	Yes	No	Yes
Northwest	140	Caldwell County Schools	140360	Kings Creek Elementary	Yes	Yes	Yes	Yes
Northwest	140	Caldwell County Schools	140372	Lower Creek Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140376	Oak Hill Elementary	Yes	Yes	Yes	Yes
Northwest	140	Caldwell County Schools	140384	Sawmills Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140392	West Lenoir Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140396	Whitnel Elementary	Yes	No	Yes	No
Northwest	140	Caldwell County Schools	140368	William Lenoir Middle	No	Yes	No	Yes
Northwest	181	Hickory City Schools	181344	Viewmont Elementary	Yes	No	No	No
Western	209	Cherokee Central Schools	209208	Cherokee Elementary	Yes	No	No	No
Western	209	Cherokee Central Schools	209206	Cherokee Middle	No	No	No	Yes
Southeast	400	Greene County Schools	400318	Greene County Intermediate	Yes	No	Yes	No
Southeast	400	Greene County Schools	400312	Greene County Middle	No	Yes	No	Yes
Western	440	Haywood County	440348	Hazelwood Elementary	Yes	No	Yes	No
North Central	510	Johnston County Schools	510328	Cleveland Elementary	Yes	No	No	No
North Central	510	Johnston County Schools	510329	Cleveland Middle	No	No	No	Yes
North Central	510	Johnston County Schools	510396	West Smithfield Elementary	Yes	No	No	No
North Central	510	Johnston County Schools	510414	West View Elementary	Yes	No	No	No
Sandhills	620	Montgomery County	620312	Candor Elementary	Yes	No	No	No
Sandhills	620	Montgomery County	620314	East Middle	No	No	No	Yes
Sandhills	620	Montgomery County	620318	Green Ridge Elementary	Yes	No	No	No
Sandhills	620	Montgomery County	620310	Montgomery Learning	No	No	No	Yes

IADA PARTICIPATION LIST: 2021-22

SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	GRADE 4 MATH	GRADE 7 MATH	GRADE 4 READING	GRADE 7 READING
Sandhills	620	Montgomery County	620324	Mount Gilead Elementary	Yes	No	No	No
Sandhills	620	Montgomery County	620330	Page Street Elementary	Yes	No	No	No
Sandhills	620	Montgomery County	620334	Star Elementary	Yes	No	No	No
Sandhills	620	Montgomery County	620339	West Middle	No	No	No	Yes
Southeast	650	New Hanover Schools	650308	Carolina Beach Elementary	Yes	No	Yes	No
Southeast	650	New Hanover Schools	650356	Ogden Elementary School	Yes	No	Yes	No
Southeast	650	New Hanover Schools	650380	Masonboro Elementary	Yes	No	Yes	No
Sandhills	770	Richmond County Schools	770364	Cordova Middle	No	Yes	No	Yes
Sandhills	770	Richmond County Schools	770310	East Rockingham	Yes	No	Yes	No
Sandhills	770	Richmond County Schools	770316	Ellerbe Middle	No	Yes	No	Yes
Sandhills	770	Richmond County Schools	770318	Fairview Heights Elementary	Yes	No	Yes	No
Sandhills	770	Richmond County Schools	770328	Hamlet Middle	No	Yes	No	Yes
Sandhills	770	Richmond County Schools	770340	L J Bell Elementary	Yes	No	Yes	No
Sandhills	770	Richmond County Schools	770344	Mineral Springs Elementary	Yes	No	Yes	No
Sandhills	770	Richmond County Schools	770346	Monroe Avenue Elementary	Yes	No	Yes	No
Sandhills	770	Richmond County Schools	770360	Rockingham Middle	No	Yes	No	Yes
Sandhills	770	Richmond County Schools	770370	Washington Street	Yes	No	Yes	No
Sandhills	770	Richmond County Schools	770368	West Rockingham	Yes	No	Yes	No
Sandhills	830	Scotland County Schools	830304	Carver Middle School	No	No	No	Yes
Sandhills	830	Scotland County Schools	830328	Laurel Hill Elementary	Yes	No	No	No
Sandhills	830	Scotland County Schools	830316	Shaw Academy	No	No	No	Yes
Sandhills	830	Scotland County Schools	830352	South Johnson Elementary	Yes	No	No	No
Sandhills	830	Scotland County Schools	830349	Spring Hill Middle	No	No	No	Yes
Sandhills	830	Scotland County Schools	830364	Sycamore Lane Elementary	Yes	No	No	No
Sandhills	830	Scotland County Schools	830360	Wagram Elementary	Yes	No	No	No
Sandhills	26B	Alpha Academy Charter	26B	Alpha Academy Charter	Yes	Yes	Yes	Yes
North Central	39A	Falls Lake Academy	39A	Falls Lake Academy	Yes	No	No	Yes
Sandhills	60B	Sugar Creek Charter School	60B	Sugar Creek Charter School	Yes	Yes	Yes	Yes
Southwest	60Q	Invest Collegiate	60Q	Invest Collegiate Transform	Yes	Yes	Yes	Yes
Sandhills	63A	The Academy of Moore	63A	The Academy of Moore	Yes	Yes	No	No
Southeast	65Z	D.C. Virgo Preparatory	65Z	D.C. Virgo Preparatory	Yes	Yes	Yes	Yes

Part III Appendices

Exhibit III.A-01 2020–21 Pilot Volunteer School Demographic Information

Demographic Information of Grade 4 IADA 2020–21 Participating Schools

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
140	Caldwell County Schools	140304	Baton Elementary	56	100	32	57.1	24	42.9	.	.	5	8.9	3	5.4	48	85.7	49	87.5	7	12.5	25	44.6	31	55.4	56	100	.	.
140	Caldwell County Schools	140307	Horizons Elementary	6	100	1	16.7	5	83.3	.	.	.	.	.	.	6	100	5	83.3	1	16.7	3	50	3	50	6	100	.	.
140	Caldwell County Schools	140308	Collettsville School	40	100	23	57.5	17	42.5	.	.	2	5	2	5	36	90	33	82.5	7	17.5	14	35	26	65	40	100	.	.
140	Caldwell County Schools	140312	Davenport A+ School	84	100	39	46.4	45	53.6	16	19	30	35.7	7	8.3	31	36.9	78	92.9	6	7.1	21	25	63	75	61	72.6	23	27.4
140	Caldwell County Schools	140316	Dudley Shoals Elementary	76	100	45	59.2	31	40.8	3	3.9	4	5.3	1	1.3	68	89.5	62	81.6	14	18.4	30	39.5	46	60.5	75	98.7	1	1.3
140	Caldwell County Schools	140324	Gamewell Elementary	74	100	35	47.3	39	52.7	8	10.8	3	4.1	7	9.5	56	75.7	63	85.1	11	14.9	25	33.8	49	66.2	74	100	.	.
140	Caldwell County Schools	140344	Happy Valley Elementary	17	100	7	41.2	10	58.8	.	.	1	5.9	1	5.9	15	88.2	13	76.5	4	23.5	6	35.3	11	64.7	17	100	.	.
140	Caldwell County Schools	140352	Hudson Elementary	126	100	51	40.5	75	59.5	2	1.6	11	8.7	6	4.8	107	84.9	111	88.1	15	11.9	50	39.7	76	60.3	120	95.2	6	4.8
140	Caldwell County Schools	140360	Kings Creek Elementary	17	100	4	23.5	13	76.5	.	.	.	.	1	5.9	16	94.1	14	82.4	3	17.6	11	64.7	6	35.3	17	100	.	.
140	Caldwell County Schools	140372	Lower Creek Elementary	72	100	30	41.7	42	58.3	5	6.9	3	4.2	2	2.8	62	86.1	60	83.3	12	16.7	42	58.3	30	41.7	72	100	.	.
140	Caldwell County Schools	140376	Oak Hill Elementary	15	100	6	40	9	60	.	.	1	6.7	.	.	14	93.3	13	86.7	2	13.3	8	53.3	7	46.7	15	100	.	.
140	Caldwell County Schools	140384	Sawmills Elementary	48	100	25	52.1	23	47.9	.	.	6	12.5	2	4.2	40	83.3	44	91.7	4	8.3	21	43.8	27	56.3	47	97.9	1	2.1
140	Caldwell County Schools	140392	West Lenoir Elementary	52	100	26	50	26	50	6	11.5	12	23.1	6	11.5	28	53.8	46	88.5	6	11.5	17	32.7	35	67.3	47	90.4	5	9.6
140	Caldwell County Schools	140396	Whitnel Elementary	41	100	19	46.3	22	53.7	2	4.9	5	12.2	2	4.9	32	78	35	85.4	6	14.6	9	22	32	78	39	95.1	2	4.9
295	Innovative School District	295300	Southside Ashpole	31	100	20	64.5	11	35.5	15	48.4	2	6.5	14	45.2	.	.	27	87.1	4	12.9	11	35.5	20	64.5	29	93.5	2	6.5
360	Gaston County Schools	360320	Belmont Central Elementary	186	100	90	48.4	96	51.6	21	11.3	7	3.8	12	6.5	146	78.5	162	87.1	24	12.9	127	68.3	59	31.7	182	97.8	4	2.2
360	Gaston County Schools	360332	Bessemer City Central Elem	144	100	81	56.3	63	43.8	36	25	24	16.7	9	6.3	75	52.1	123	85.4	21	14.6	53	36.8	91	63.2	132	91.7	12	8.3

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
360	Gaston County Schools	360339	W B Beam Intermediate School	90	100	48	53.3	42	46.7	5	5.6	9	10	7	7.8	69	76.7	74	82.2	16	17.8	42	46.7	48	53.3	89	98.9	1	1.1
360	Gaston County Schools	360340	Brookside Elementary	107	100	55	51.4	52	48.6	33	30.8	23	21.5	9	8.4	42	39.3	91	85	16	15	56	52.3	51	47.7	97	90.7	10	9.3
360	Gaston County Schools	360344	Carr Elementary	131	100	68	51.9	63	48.1	37	28.2	15	11.5	9	6.9	70	53.4	100	76.3	31	23.7	68	51.9	63	48.1	123	93.9	8	6.1
360	Gaston County Schools	360348	Catawba Heights Elementary	49	100	23	46.9	26	53.1	6	12.2	6	12.2	4	8.2	33	67.3	34	69.4	15	30.6	20	40.8	29	59.2	47	95.9	2	4.1
360	Gaston County Schools	360352	Chapel Grove Elementary	69	100	34	49.3	35	50.7	6	8.7	7	10.1	4	5.8	52	75.4	51	73.9	18	26.1	38	55.1	31	44.9	65	94.2	4	5.8
360	Gaston County Schools	360376	Costner Elementary	71	100	33	46.5	38	53.5	6	8.5	4	5.6	5	7	56	78.9	60	84.5	11	15.5	45	63.4	26	36.6	70	98.6	1	1.4
360	Gaston County Schools	360392	Edward D Sadler Jr Elementary School	80	100	30	37.5	50	62.5	32	40	24	30	5	6.3	19	23.8	69	86.3	11	13.8	34	42.5	46	57.5	72	90	8	10
360	Gaston County Schools	360400	Gardner Park Elementary	101	100	50	49.5	51	50.5	36	35.6	35	34.7	6	5.9	24	23.8	84	83.2	17	16.8	54	53.5	47	46.5	84	83.2	17	16.8
360	Gaston County Schools	360420	Hawks Nest STEAM Academy	53	100	26	49.1	27	50.9	9	17	4	7.5	5	9.4	35	66	49	92.5	4	7.5	38	71.7	15	28.3	50	94.3	3	5.7
360	Gaston County Schools	360432	Kiser Elementary	121	100	63	52.1	58	47.9	2	1.7	11	9.1	8	6.6	100	82.6	94	77.7	27	22.3	51	42.1	70	57.9	114	94.2	7	5.8
360	Gaston County Schools	360438	Lingerfeldt Elementary	65	100	38	58.5	27	41.5	26	40	18	27.7	7	10.8	14	21.5	54	83.1	11	16.9	22	33.8	43	66.2	53	81.5	12	18.5
360	Gaston County Schools	360440	Lowell Elementary	92	100	47	51.1	45	48.9	12	13	18	19.6	8	8.7	54	58.7	80	87	12	13	38	41.3	54	58.7	79	85.9	13	14.1
360	Gaston County Schools	360448	McAdenville Elementary	35	100	17	48.6	18	51.4	4	11.4	3	8.6	2	5.7	26	74.3	29	82.9	6	17.1	17	48.6	18	51.4	34	97.1	1	2.9
360	Gaston County Schools	360464	New Hope Elementary	86	100	41	47.7	45	52.3	5	5.8	6	7	8	9.3	67	77.9	73	84.9	13	15.1	62	72.1	24	27.9	84	97.7	2	2.3
360	Gaston County Schools	360468	North Belmont Elementary	56	100	30	53.6	26	46.4	4	7.1	13	23.2	8	14.3	31	55.4	42	75	14	25	27	48.2	29	51.8	49	87.5	7	12.5
360	Gaston County Schools	360478	Pinewood Elementary	89	100	41	46.1	48	53.9	21	23.6	6	6.7	4	4.5	58	65.2	78	87.6	11	12.4	46	51.7	43	48.3	87	97.8	2	2.2
360	Gaston County Schools	360480	Pleasant Ridge Elementary	162	100	79	48.8	83	51.2	67	41.4	31	19.1	10	6.2	54	33.3	140	86.4	22	13.6	92	56.8	70	43.2	142	87.7	20	12.3

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
360	Gaston County Schools	360482	Ida Rankin Elementary School	105	100	53	50.5	52	49.5	23	21.9	6	5.7	4	3.8	72	68.6	89	84.8	16	15.2	51	48.6	54	51.4	104	99	1	1
360	Gaston County Schools	360488	Robinson Elementary	67	100	34	50.7	33	49.3	13	19.4	4	6	6	9	44	65.7	55	82.1	12	17.9	39	58.2	28	41.8	65	97	2	3
360	Gaston County Schools	360490	Sherwood Elementary	98	100	51	52	47	48	44	44.9	28	28.6	11	11.2	15	15.3	77	78.6	21	21.4	17	17.3	81	82.7	85	86.7	13	13.3
360	Gaston County Schools	360492	H H Beam Elementary	101	100	50	49.5	51	50.5	37	36.6	35	34.7	5	5	24	23.8	89	88.1	12	11.9	36	35.6	65	64.4	79	78.2	22	21.8
360	Gaston County Schools	360504	Tryon Elementary	52	100	26	50	26	50	3	5.8	6	11.5	2	3.8	41	78.8	35	67.3	17	32.7	27	51.9	25	48.1	50	96.2	2	3.8
360	Gaston County Schools	360510	W A Bess Elementary School	88	100	44	50	44	50	5	5.7	7	8	11	12.5	65	73.9	77	87.5	11	12.5	63	71.6	25	28.4	84	95.5	4	4.5
360	Gaston County Schools	360520	Woodhill Elementary	92	100	48	52.2	44	47.8	52	56.5	23	25	7	7.6	10	10.9	84	91.3	8	8.7	25	27.2	67	72.8	81	88	11	12
360	Gaston County Schools	360550	Gaston Virtual Academy	7	100	4	57.1	3	42.9	1	14.3	.	.	1	14.3	5	71.4	7	100	.	.	7	100	.	.	7	100	.	.
390	Granville County Schools	390362	Tar River Elementary	84	100	39	46.4	45	53.6	13	15.5	15	17.9	2	2.4	54	64.3	69	82.1	15	17.9	51	60.7	33	39.3	76	90.5	8	9.5
400	Greene County Schools	400318	Greene County Intermediate	254	100	116	45.7	138	54.3	85	33.5	85	33.5	13	5.1	71	28	228	89.8	26	10.2	112	44.1	142	55.9	199	78.3	55	21.7
510	Johnston County Schools	510328	Cleveland Elementary	157	100	85	54.1	72	45.9	24	15.3	27	17.2	8	5.1	98	62.4	135	86	22	14	113	72	44	28	150	95.5	7	4.5
510	Johnston County Schools	510396	West Smithfield Elementary	80	100	29	36.3	51	63.8	18	22.5	51	63.8	3	3.8	8	10	64	80	16	20	39	48.8	41	51.3	47	58.8	33	41.3
510	Johnston County Schools	510414	West View Elementary	190	100	101	53.2	89	46.8	23	12.1	28	14.7	15	7.9	124	65.3	162	85.3	28	14.7	138	72.6	52	27.4	178	93.7	12	6.3
620	Montgomery County Schools	620312	Candor Elementary	53	100	21	39.6	32	60.4	12	22.6	34	64.2	.	.	7	13.2	45	84.9	8	15.1	4	7.5	49	92.5	36	67.9	17	32.1
620	Montgomery County Schools	620318	Green Ridge Elementary	48	100	20	41.7	28	58.3	8	16.7	30	62.5	4	8.3	6	12.5	47	97.9	1	2.1	10	20.8	38	79.2	41	85.4	7	14.6
620	Montgomery County Schools	620324	Mount Gilead Elementary	37	100	14	37.8	23	62.2	14	37.8	4	10.8	6	16.2	13	35.1	31	83.8	6	16.2	10	27	27	73	36	97.3	1	2.7
620	Montgomery County Schools	620330	Page Street Elementary	73	100	35	47.9	38	52.1	15	20.5	15	20.5	6	8.2	37	50.7	65	89	8	11	24	32.9	49	67.1	63	86.3	10	13.7
620	Montgomery County Schools	620334	Star Elementary	59	100	30	50.8	29	49.2	7	11.9	19	32.2	5	8.5	28	47.5	54	91.5	5	8.5	17	28.8	42	71.2	52	88.1	7	11.9

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
650	New Hanover Schools	650308	Carolina Beach Elementary School	83	100	40	48.2	43	51.8	1	1.2	2	2.4	6	7.2	74	89.2	77	92.8	6	7.2	45	54.2	38	45.8	83	100	.	.
650	New Hanover Schools	650339	Holly Tree Elementary School	87	100	36	41.4	51	58.6	5	5.7	11	12.6	4	4.6	67	77	76	87.4	11	12.6	67	77	20	23	83	95.4	4	4.6
650	New Hanover Schools	650356	Ogden Elementary School	118	100	62	52.5	56	47.5	.	.	7	5.9	11	9.3	100	84.7	114	96.6	4	3.4	101	85.6	17	14.4	117	99.2	1	0.8
650	New Hanover Schools	650380	Walter Parsley Elementary School	93	100	54	58.1	39	41.9	2	2.2	10	10.8	8	8.6	73	78.5	86	92.5	7	7.5	78	83.9	15	16.1	89	95.7	4	4.3
770	Richmond County Schools	770310	East Rockingham Elementary	86	100	43	50	43	50	22	25.6	20	23.3	9	10.5	35	40.7	74	86	12	14	31	36	55	64	79	91.9	7	8.1
770	Richmond County Schools	770318	Fairview Heights Elementary	73	100	32	43.8	41	56.2	23	31.5	6	8.2	13	17.8	31	42.5	58	79.5	15	20.5	28	38.4	45	61.6	71	97.3	2	2.7
770	Richmond County Schools	770340	L J Bell Elementary	97	100	50	51.5	47	48.5	38	39.2	8	8.2	8	8.2	43	44.3	82	84.5	15	15.5	40	41.2	57	58.8	94	96.9	3	3.1
770	Richmond County Schools	770344	Mineral Springs Elementary	62	100	31	50	31	50	21	33.9	10	16.1	7	11.3	24	38.7	44	71	18	29	26	41.9	36	58.1	60	96.8	2	3.2
770	Richmond County Schools	770346	Monroe Avenue Elementary	64	100	30	46.9	34	53.1	31	48.4	6	9.4	7	10.9	20	31.3	49	76.6	15	23.4	21	32.8	43	67.2	61	95.3	3	4.7
770	Richmond County Schools	770368	West Rockingham Elementary	43	100	16	37.2	27	62.8	8	18.6	11	25.6	4	9.3	20	46.5	39	90.7	4	9.3	15	34.9	28	65.1	39	90.7	4	9.3
770	Richmond County Schools	770370	Washington Street Elementary	75	100	39	52	36	48	34	45.3	6	8	9	12	26	34.7	66	88	9	12	33	44	42	56	72	96	3	4
800	Rowan-Salisbury Schools	800312	Bostian Elementary	59	100	25	42.4	34	57.6	1	1.7	6	10.2	3	5.1	49	83.1	47	79.7	12	20.3	40	67.8	19	32.2	56	94.9	3	5.1
800	Rowan-Salisbury Schools	800315	Overton Elementary	43	100	24	55.8	19	44.2	20	46.5	6	14	6	14	11	25.6	34	79.1	9	20.9	18	41.9	25	58.1	41	95.3	2	4.7
800	Rowan-Salisbury Schools	800316	China Grove Elementary	99	100	47	47.5	52	52.5	4	4	24	24.2	7	7.1	64	64.6	92	92.9	7	7.1	33	33.3	66	66.7	83	83.8	16	16.2

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
800	Rowan-Salisbury Schools	800346	Koontz Elementary	59	100	25	42.4	34	57.6	25	42.4	15	25.4	10	16.9	9	15.3	50	84.7	9	15.3	20	33.9	39	66.1	52	88.1	7	11.9
800	Rowan-Salisbury Schools	800347	Shive Elementary	66	100	28	42.4	38	57.6	3	4.5	5	7.6	1	1.5	57	86.4	48	72.7	18	27.3	30	45.5	36	54.5	63	95.5	3	4.5
800	Rowan-Salisbury Schools	800348	Enochville Elementary	52	100	24	46.2	28	53.8	1	1.9	4	7.7	3	5.8	44	84.6	49	94.2	3	5.8	21	40.4	31	59.6	49	94.2	3	5.8
800	Rowan-Salisbury Schools	800352	Faith Elementary	46	100	25	54.3	21	45.7	2	4.3	3	6.5	4	8.7	37	80.4	40	87	6	13	26	56.5	20	43.5	45	97.8	1	2.2
800	Rowan-Salisbury Schools	800356	Granite Quarry Elementary	98	100	41	41.8	57	58.2	20	20.4	11	11.2	12	12.2	55	56.1	85	86.7	13	13.3	43	43.9	55	56.1	94	95.9	4	4.1
800	Rowan-Salisbury Schools	800358	Isenberg Elementary	71	100	26	36.6	45	63.4	37	52.1	13	18.3	6	8.5	15	21.1	58	81.7	13	18.3	31	43.7	40	56.3	63	88.7	8	11.3
800	Rowan-Salisbury Schools	800359	Dole Elementary	79	100	35	44.3	44	55.7	28	35.4	19	24.1	8	10.1	24	30.4	71	89.9	8	10.1	25	31.6	54	68.4	67	84.8	12	15.2
800	Rowan-Salisbury Schools	800360	Hurley Elementary	72	100	31	43.1	41	56.9	23	31.9	17	23.6	10	13.9	22	30.6	60	83.3	12	16.7	31	43.1	41	56.9	60	83.3	12	16.7
800	Rowan-Salisbury Schools	800362	Knollwood Elementary	94	100	48	51.1	46	48.9	13	13.8	56	59.6	3	3.2	22	23.4	85	90.4	9	9.6	24	25.5	70	74.5	64	68.1	30	31.9
800	Rowan-Salisbury Schools	800364	Landis Elementary	77	100	39	50.6	38	49.4	14	18.2	23	29.9	4	5.2	36	46.8	62	80.5	15	19.5	39	50.6	38	49.4	66	85.7	11	14.3
800	Rowan-Salisbury Schools	800366	Millbridge Elementary	97	100	53	54.6	44	45.4	.	.	11	11.3	4	4.1	82	84.5	79	81.4	18	18.6	58	59.8	39	40.2	92	94.8	5	5.2
800	Rowan-Salisbury Schools	800368	Morgan Elementary	42	100	19	45.2	23	54.8	1	2.4	.	.	2	4.8	39	92.9	38	90.5	4	9.5	19	45.2	23	54.8	42	100	.	.

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
800	Rowan-Salisbury Schools	800372	Mt Ulla Elementary	54	100	25	46.3	29	53.7	2	3.7	7	13	1	1.9	44	81.5	50	92.6	4	7.4	32	59.3	22	40.7	51	94.4	3	5.6
800	Rowan-Salisbury Schools	800373	North Rowan Elementary	65	100	31	47.7	34	52.3	28	43.1	15	23.1	5	7.7	17	26.2	55	84.6	10	15.4	28	43.1	37	56.9	59	90.8	6	9.2
800	Rowan-Salisbury Schools	800392	Rockwell Elementary	80	100	37	46.3	43	53.8	.	.	9	11.3	1	1.3	70	87.5	74	92.5	6	7.5	44	55	36	45	78	97.5	2	2.5
800	Rowan-Salisbury Schools	800406	West Rowan Elementary	81	100	37	45.7	44	54.3	15	18.5	11	13.6	8	9.9	47	58	72	88.9	9	11.1	31	38.3	50	61.7	74	91.4	7	8.6
830	Scotland County Schools	830320	I E Johnson Elementary	45	100	27	60	18	40	31	68.9	2	4.4	5	11.1	7	15.6	32	71.1	13	28.9	6	13.3	39	86.7	44	97.8	1	2.2
830	Scotland County Schools	830328	Laurel Hill Elementary	128	100	69	53.9	59	46.1	47	36.7	7	5.5	29	22.7	45	35.2	101	78.9	27	21.1	46	35.9	82	64.1	127	99.2	1	0.8
830	Scotland County Schools	830356	South Scotland Elementary	62	100	27	43.5	35	56.5	18	29	.	.	26	41.9	18	29	52	83.9	10	16.1	28	45.2	34	54.8	62	100	.	.
830	Scotland County Schools	830360	Wagram Elementary	62	100	43	69.4	19	30.6	34	54.8	3	4.8	13	21	12	19.4	51	82.3	11	17.7	18	29	44	71	62	100	.	.
830	Scotland County Schools	830364	Sycamore Lane Elementary	136	100	71	52.2	65	47.8	79	58.1	8	5.9	19	14	30	22.1	105	77.2	31	22.8	36	26.5	100	73.5	136	100	.	.
940	Washington County Schools	940306	Creswell Elementary	13	100	3	23.1	10	76.9	6	46.2	4	30.8	.	.	3	23.1	9	69.2	4	30.8	5	38.5	8	61.5	9	69.2	4	30.8
940	Washington County Schools	940314	Pines Elementary	67	100	36	53.7	31	46.3	58	86.6	2	3	3	4.5	4	6	58	86.6	9	13.4	19	28.4	48	71.6	66	98.5	1	1.5
950	Watagua Schools	950308	Bethel Elementary	20	100	10	50	10	50	.	.	.	.	.	.	20	100	14	70	6	30	9	45	11	55	20	100	.	.
950	Watagua Schools	950312	Blowing Rock Elementary	39	100	17	43.6	22	56.4	.	.	1	2.6	3	7.7	35	89.7	32	82.1	7	17.9	33	84.6	6	15.4	39	100	.	.
950	Watagua Schools	950316	Cove Creek Elementary	27	100	13	48.1	14	51.9	.	.	1	3.7	.	.	26	96.3	20	74.1	7	25.9	20	74.1	7	25.9	26	96.3	1	3.7
950	Watagua Schools	950320	Green Valley Elementary	28	100	11	39.3	17	60.7	.	.	2	7.1	1	3.6	25	89.3	23	82.1	5	17.9	11	39.3	17	60.7	27	96.4	1	3.6
950	Watagua Schools	950322	Hardin Park Elementary	101	100	49	48.5	52	51.5	4	4	16	15.8	13	12.9	68	67.3	71	70.3	30	29.7	65	64.4	36	35.6	93	92.1	8	7.9
950	Watagua Schools	950324	Mabel Elementary	21	100	13	61.9	8	38.1	.	.	.	.	2	9.5	19	90.5	15	71.4	6	28.6	9	42.9	12	57.1	21	100	.	.

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
950	Watagua Schools	950328	Parkway Elementary	71	100	30	42.3	41	57.7	.	.	9	12.7	2	2.8	60	84.5	58	81.7	13	18.3	51	71.8	20	28.2	69	97.2	2	2.8
950	Watagua Schools	950332	Valle Crucis Elementary	32	100	18	56.3	14	43.8	1	3.1	7	21.9	.	.	24	75	25	78.1	7	21.9	20	62.5	12	37.5	27	84.4	5	15.6
13B	Cabarrus Charter Academy	13B000	Cabarrus Charter Academy	68	100	36	52.9	32	47.1	22	32.4	9	13.2	13	19.1	24	35.3	62	91.2	6	8.8	43	63.2	25	36.8	66	97.1	2	2.9
26B	Alpha Academy Charter	26B000	Alpha Academy Charter	92	100	46	50	46	50	54	58.7	16	17.4	10	10.9	12	13	86	93.5	6	6.5	62	67.4	30	32.6	85	92.4	7	7.6
34F	Forsyth Academy	34F000	Forsyth Academy	79	100	45	57	34	43	36	45.6	34	43	4	5.1	5	6.3	71	89.9	8	10.1	10	12.7	69	87.3	60	75.9	19	24.1
39A	Falls Lake Academy	39A000	Falls Lake Academy	81	100	43	53.1	38	46.9	6	7.4	9	11.1	5	6.2	61	75.3	73	90.1	8	9.9	76	93.8	5	6.2	81	100	.	.
60Q	Invest Collegiate	60Q000	Invest Collegiate	36	100	22	61.1	14	38.9	30	83.3	4	11.1	2	5.6	.	.	34	94.4	2	5.6	17	47.2	19	52.8	36	100	.	.
63A	The Academy of Moore County	63A000	The Academy of Moore County	57	100	31	54.4	26	45.6	5	8.8	5	8.8	8	14	39	68.4	49	86	8	14	54	94.7	3	5.3	57	100	.	.
65Z	D.C. Virgo Preparatory School	65Z000	D.C. Virgo Preparatory School	12	100	6	50	6	50	10	83.3	1	8.3	.	.	1	8.3	9	75	3	25	2	16.7	10	83.3	12	100	.	.

Demographic Information of Grade 7 IADA 2020–21 Participating Schools

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
140	Caldwell County Schools	140306	Gateway School	14	100	4	29	10	71	1	7.1	.	.	3	21	10	71	8	57	6	43	5	36	9	64	14	100	.	.
140	Caldwell County Schools	140308	Collettsville School	34	100	17	50	17	50	.	.	1	2.9	2	5.9	31	91	30	88	4	12	16	47	18	53	34	100	.	.
140	Caldwell County Schools	140332	Gamewell Middle	188	100	83	44	105	56	19	10	44	23	21	11	104	55	164	87	24	13	38	20	150	80	180	96	8	4.3
140	Caldwell County Schools	140336	Granite Falls Middle	186	100	86	46	100	54	6	3.2	9	4.8	9	4.8	162	87	163	88	23	12	107	58	79	43	186	100	.	.
140	Caldwell County Schools	140344	Happy Valley Elementary	19	100	12	63	7	37	.	.	.	.	.	.	19	100	17	90	2	11	8	42	11	58	19	100	.	.
140	Caldwell County Schools	140356	Hudson Middle	265	100	132	50	133	50	2	0.8	29	11	16	6	218	82	238	90	27	10	106	40	159	60	261	99	4	1.5
140	Caldwell County Schools	140360	Kings Creek Elementary	24	100	14	58	10	42	1	4.2	4	17	.	.	19	79	19	79	5	21	7	29	17	71	24	100	.	.
140	Caldwell County Schools	140368	William Lenoir Middle	207	100	98	47	109	53	20	9.7	37	18	19	9.2	131	63	171	83	36	17	74	36	133	64	198	96	9	4.3
140	Caldwell County Schools	140376	Oak Hill Elementary	11	100	8	73	3	27	.	.	.	.	2	18	9	82	8	73	3	27	2	18	9	82	11	100	.	.
360	Gaston County Schools	360324	Belmont Middle	226	100	114	50	112	50	28	12	18	8	21	9.3	159	70	201	89	25	11	155	69	71	31	219	97	7	3.1
360	Gaston County Schools	360372	Warlick Academy	17	100	6	35	11	65	9	53	3	18	1	5.9	4	24	14	82	3	18	6	35	11	65	15	88	2	12
360	Gaston County Schools	360380	Cramerton Middle	266	100	134	50	132	50	33	12	24	9	25	9.4	184	69	239	90	27	10	196	74	70	26	261	98	5	1.9
360	Gaston County Schools	360408	W P Grier Middle School	260	100	129	50	131	50	151	58	61	24	10	3.8	38	15	220	85	40	15	100	39	160	62	248	95	12	4.6
360	Gaston County Schools	360426	Holbrook Middle	266	100	139	52	127	48	74	28	57	21	22	8.3	113	43	229	86	37	14	93	35	173	65	245	92	21	7.9
360	Gaston County Schools	360431	John Chavis Middle School	142	100	77	54	65	46	21	15	9	6.3	7	4.9	105	74	118	83	24	17	64	45	78	55	142	100	.	.
360	Gaston County Schools	360436	Bessemer City Middle	175	100	93	53	82	47	50	29	30	17	12	6.9	83	47	151	86	24	14	85	49	90	51	169	97	6	3.4
360	Gaston County Schools	360456	Mount Holly Middle	224	100	106	47	118	53	34	15	30	13	24	11	136	61	185	83	39	17	134	60	90	40	217	97	7	3.1

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
360	Gaston County Schools	360498	Southwest Middle	299	100	151	51	148	50	85	28	85	28	22	7.4	107	36	255	85	44	15	134	45	165	55	275	92	24	8
360	Gaston County Schools	360500	Stanley Middle	260	100	112	43	148	57	34	13	26	10	17	6.5	183	70	223	86	37	14	161	62	99	38	256	99	4	1.5
360	Gaston County Schools	360514	W C Friday Middle School	219	100	122	56	97	44	35	16	37	17	15	6.8	132	60	189	86	30	14	101	46	118	54	207	95	12	5.5
360	Gaston County Schools	360550	Gaston Virtual Academy	21	100	13	62	8	38	2	9.5	1	4.8	3	14	15	71	19	91	2	9.5	19	91	2	9.5	21	100	.	.
390	Granville County Schools	390320	G. C. Hawley Middle	197	100	95	48	102	52	48	24	33	17	12	6.1	104	53	174	88	23	12	114	58	83	42	191	97	6	3
400	Greene County Schools	400312	Greene County Middle	252	100	120	48	132	52	98	39	87	35	6	2.4	61	24	228	91	24	9.5	103	41	149	59	238	94	14	5.6
491	Mooresville Graded School District	491308	Mooresville Middle	519	100	244	47	275	53	100	19	60	12	43	8.3	316	61	439	85	80	15	313	60	206	40	512	99	7	1.3
510	Johnston County Schools	510329	Cleveland Middle	341	100	162	48	179	53	58	17	41	12	29	8.5	213	63	299	88	42	12	260	76	81	24	329	97	12	3.5
620	Montgomery County Schools	620310	Montgomery Learning Academy	10	100	1	10	9	90	5	50	1	10	.	.	4	40	8	80	2	20	3	30	7	70	10	100	.	.
620	Montgomery County Schools	620314	East Middle	172	100	91	53	81	47	24	14	94	55	4	2.3	50	29	156	91	16	9.3	37	22	135	79	148	86	24	14
620	Montgomery County Schools	620339	West Middle	128	100	56	44	72	56	29	23	13	10	12	9.4	74	58	112	88	16	13	44	34	84	66	127	99	1	0.8
650	New Hanover Schools	650325	Emma Trask Middle School	249	100	124	50	125	50	35	14	46	19	20	8	148	59	232	93	17	6.8	193	78	56	23	239	96	10	4
770	Richmond County Schools	770316	Ellerbe Middle	84	100	39	46	45	54	17	20	24	29	11	13	32	38	68	81	16	19	37	44	47	56	74	88	10	12
770	Richmond County Schools	770328	Hamlet Middle	173	100	89	51	84	49	71	41	20	12	16	9.2	66	38	159	92	14	8.1	74	43	99	57	168	97	5	2.9
770	Richmond County Schools	770360	Rockingham Middle	223	100	100	45	123	55	90	40	24	11	22	9.9	87	39	202	91	21	9.4	96	43	127	57	222	100	1	0.4
770	Richmond County Schools	770364	Cordova Middle	113	100	59	52	54	48	28	25	23	20	9	8	53	47	102	90	11	9.7	41	36	72	64	108	96	5	4.4
800	Rowan-Salisbury Schools	800314	Erwin Middle	328	100	152	46	176	54	23	7	21	6.4	21	6.4	263	80	295	90	33	10	144	44	184	56	322	98	6	1.8

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
800	Rowan-Salisbury Schools	800320	China Grove Middle	192	100	93	48	99	52	3	1.6	30	16	19	9.9	140	73	178	93	14	7.3	100	52	92	48	187	97	5	2.6
800	Rowan-Salisbury Schools	800328	Corriher Lipe Middle	195	100	101	52	94	48	13	6.7	40	21	13	6.7	129	66	177	91	18	9.2	76	39	119	61	186	95	9	4.6
800	Rowan-Salisbury Schools	800363	Knox Middle	212	100	97	46	115	54	124	59	48	23	14	6.6	26	12	181	85	31	15	87	41	125	59	199	94	13	6.1
800	Rowan-Salisbury Schools	800377	North Rowan Middle	149	100	68	46	81	54	60	40	28	19	18	12	43	29	135	91	14	9.4	77	52	72	48	140	94	9	6
800	Rowan-Salisbury Schools	800398	Southeast Middle	243	100	113	47	130	54	17	7	87	36	13	5.3	126	52	222	91	21	8.6	92	38	151	62	214	88	29	12
800	Rowan-Salisbury Schools	800410	West Rowan Middle	213	100	107	50	106	50	40	19	27	13	23	11	123	58	189	89	24	11	97	46	116	55	207	97	6	2.8
830	Scotland County Schools	830304	Carver Middle School	249	100	108	43	141	57	112	45	12	4.8	50	20	75	30	197	79	52	21	90	36	159	64	248	100	1	0.4
830	Scotland County Schools	830316	Shaw Academy	6	100	1	17	5	83	4	67	.	.	2	33	.	.	3	50	3	50	1	17	5	83	6	100	.	.
830	Scotland County Schools	830349	Spring Hill Middle	219	100	101	46	118	54	104	48	6	2.7	55	25	54	25	177	81	42	19	90	41	129	59	217	99	2	0.9
940	Washington County Schools	940328	Washington County Middle	82	100	50	61	32	39	67	82	6	7.3	2	2.4	7	8.5	76	93	6	7.3	27	33	55	67	80	98	2	2.4
950	Watagua Schools	950308	Bethel Elementary	19	100	12	63	7	37	.	.	.	.	.	.	19	100	15	79	4	21	11	58	8	42	19	100	.	.
950	Watagua Schools	950312	Blowing Rock Elementary	35	100	20	57	15	43	1	2.9	2	5.7	3	8.6	29	83	32	91	3	8.6	28	80	7	20	35	100	.	.
950	Watagua Schools	950316	Cove Creek Elementary	33	100	19	58	14	42	.	.	2	6.1	1	3	30	91	22	67	11	33	23	70	10	30	33	100	.	.
950	Watagua Schools	950320	Green Valley Elementary	42	100	24	57	18	43	1	2.4	3	7.1	1	2.4	37	88	38	91	4	9.5	17	41	25	60	40	95	2	4.8
950	Watagua Schools	950322	Hardin Park Elementary	98	100	46	47	52	53	3	3.1	10	10	4	4.1	81	83	77	79	21	21	69	70	29	30	96	98	2	2
950	Watagua Schools	950324	Mabel Elementary	29	100	14	48	15	52	.	.	1	3.4	1	3.4	27	93	26	90	3	10	16	55	13	45	29	100	.	.

LEA Code	LEA Name	School Code	School Name	All		Sex				Ethnic								SWD				EDS				ELS			
						Female		Male		Black		Hispanic		Other		White		Regular		SWD		Not EDS		EDS		Not ELL		ELL	
				N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
950	Watagua Schools	950328	Parkway Elementary	69	100	40	58	29	42	.	.	8	12	6	8.7	55	80	63	91	6	8.7	51	74	18	26	67	97	2	2.9
950	Watagua Schools	950332	Valle Crucis Elementary	53	100	28	53	25	47	.	.	9	17	1	1.9	43	81	48	91	5	9.4	36	68	17	32	51	96	2	3.8
13B	Cabarrus Charter Academy	13B000	Cabarrus Charter Academy	49	100	24	49	25	51	22	45	10	20	1	2	16	33	39	80	10	20	31	63	18	37	46	94	3	6.1
26B	Alpha Academy Charter	26B000	Alpha Academy Charter	89	100	54	61	35	39	54	61	14	16	10	11	11	12	85	96	4	4.5	61	69	28	32	85	96	4	4.5
34F	Forsyth Academy	34F000	Forsyth Academy	71	100	33	47	38	54	23	32	34	48	6	8.5	8	11	60	85	11	16	15	21	56	79	58	82	13	18
39A	Falls Lake Academy	39A000	Falls Lake Academy	81	100	41	51	40	49	5	6.2	5	6.2	2	2.5	69	85	71	88	10	12	76	94	5	6.2	80	99	1	1.2
60Q	Invest Collegiate	60Q000	Invest Collegiate	30	100	18	60	12	40	27	90	1	3.3	2	6.7	.	.	26	87	4	13	18	60	12	40	30	100	.	.
65Z	D.C. Virgo Preparatory School	65Z000	D.C. Virgo Preparatory School	34	100	16	47	18	53	31	91	2	5.9	.	.	1	2.9	27	79	7	21	11	32	23	68	34	100	.	.

Exhibit III.B-01 2021–22 Pilot Volunteer School Demographic Information

2021–22 PILOT VOLUNTEER SCHOOL DEMOGRAPHIC INFORMATION
Grade 4 Mathematics Demographic Sample Based on 2020–21 Grade 3 Enrollment Data

LEA Name	School Name	All	Gender (%)		Ethnicity (%)				SWD (%)	EDS (%)	ELs (%)
			Female	Male	Black	Hispanic	Other	White			
Caldwell County Schools	Baton Elementary	50	52.0	48.0	2.0	2.0	6.0	90.0	16.0	56.0	.
Caldwell County Schools	Horizons Elementary	10	20.0	80.0	10.0	.	10.0	80.0	60.0	90.0	.
Caldwell County Schools	Collettsville School	40	55.0	45.0	.	2.5	.	97.5	2.5	60.0	.
Caldwell County Schools	Davenport A+ School	87	50.6	49.4	19.5	34.5	8.0	37.9	14.9	67.8	12.6
Caldwell County Schools	Dudley Shoals Elementary	69	44.9	55.1	1.4	4.3	4.3	89.9	13.0	55.1	2.9
Caldwell County Schools	Gamewell Elementary	60	51.7	48.3	13.3	8.3	6.7	71.7	8.3	61.7	1.7
Caldwell County Schools	Granite Falls Elementary	96	45.8	54.2	5.2	8.3	7.3	79.2	7.3	34.4	4.2
Caldwell County Schools	Happy Valley Elementary	18	33.3	66.7	.	5.6	.	94.4	.	66.7	.
Caldwell County Schools	Hudson Elementary	116	54.3	45.7	0.9	9.5	6.9	82.8	7.8	51.7	6.0
Caldwell County Schools	Kings Creek Elementary	14	50.0	50.0	7.1	.	.	92.9	7.1	78.6	.
Caldwell County Schools	Lower Creek Elementary	64	46.9	53.1	.	6.3	9.4	84.4	17.2	39.1	.
Caldwell County Schools	Sawmills Elementary	55	47.3	52.7	3.6	10.9	1.8	83.6	10.9	52.7	5.5
Caldwell County Schools	West Lenoir Elementary	45	44.4	55.6	17.8	24.4	11.1	46.7	13.3	66.7	2.2
Caldwell County Schools	Whitnel Elementary	46	58.7	41.3	6.5	17.4	10.9	65.2	21.7	78.3	8.7
Caldwell County Schools	Oak Hill Elementary	Data not available									
Hickory City Schools	Viewmont Elementary	70	47.1	52.9	20.0	32.9	20.0	27.1	8.6	54.3	20.0
Cherokee Central Schools (Federal)	Cherokee Elementary	Data not available									
Greene County Schools	Greene County Intermediate	Data not available									
Haywood County	Hazelwood Elementary	89	46.1	53.9	.	13.5	7.9	78.7	21.3	41.6	5.6
Johnston County Schools	Cleveland Elementary	160	48.1	51.9	18.8	21.9	5.0	54.4	8.8	21.3	8.1
Johnston County Schools	West Smithfield Elementary	66	62.1	37.9	31.8	53.0	4.5	10.6	13.6	53.0	22.7
Johnston County Schools	West View Elementary	159	49.1	50.9	19.5	16.4	6.3	57.9	15.7	25.2	5.7
Montgomery County Schools	Candor Elementary	57	45.6	54.4	12.3	54.4	14.0	19.3	8.8	86.0	28.1
Montgomery County Schools	Green Ridge Elementary	50	44.0	56.0	14.0	54.0	2.0	30.0	10.0	72.0	28.0
Montgomery County Schools	Mount Gilead Elementary	39	43.6	56.4	43.6	5.1	2.6	48.7	10.3	87.2	2.6
Montgomery County Schools	Page Street Elementary	84	46.4	53.6	20.2	21.4	4.8	53.6	13.1	61.9	8.3
Montgomery County Schools	Star Elementary	52	50.0	50.0	3.8	42.3	7.7	46.2	7.7	65.4	9.6
New Hanover Schools	Carolina Beach Elementary School	77	49.4	50.6	.	1.3	1.3	97.4	14.3	19.5	.
New Hanover Schools	Ogden Elementary School	104	46.2	53.8	3.8	4.8	1.9	89.4	4.8	8.7	1.0
New Hanover Schools	Masonboro Elementary School	80	47.5	52.5	5.0	12.5	3.8	78.8	10.0	13.8	1.3
Richmond County Schools	East Rockingham Elementary	69	40.6	59.4	27.5	14.5	8.7	49.3	17.4	71.0	8.7
Richmond County Schools	Fairview Heights Elementary	74	47.3	52.7	29.7	6.8	18.9	44.6	17.6	55.4	1.4

2021–22 PILOT VOLUNTEER SCHOOL DEMOGRAPHIC INFORMATION
Grade 4 Mathematics Demographic Sample Based on 2020–21 Grade 3 Enrollment Data

LEA Name	School Name	All	Gender (%)		Ethnicity (%)				SWD (%)	EDS (%)	ELs (%)
			Female	Male	Black	Hispanic	Other	White			
Richmond County Schools	L J Bell Elementary	78	47.4	52.6	35.9	3.8	11.5	48.7	7.7	55.1	2.6
Richmond County Schools	Mineral Springs Elementary	51	47.1	52.9	27.5	15.7	19.6	37.3	21.6	58.8	9.8
Richmond County Schools	Monroe Avenue Elementary	63	49.2	50.8	55.6	4.8	14.3	25.4	9.5	79.4	3.2
Richmond County Schools	West Rockingham Elementary	39	53.8	46.2	30.8	15.4	7.7	46.2	15.4	64.1	10.3
Richmond County Schools	Washington Street Elementary	70	44.3	55.7	61.4	1.4	11.4	25.7	11.4	65.7	4.3
Scotland County Schools	Laurel Hill Elementary	104	60.6	39.4	38.5	1.0	26.0	34.6	20.2	61.5	.
Scotland County Schools	South Johnson Elementary	103	51.5	48.5	50.5	2.9	22.3	24.3	18.4	62.1	1.0
Scotland County Schools	Wagram Elementary	72	43.1	56.9	45.8	5.6	29.2	19.4	20.8	72.2	.
Scotland County Schools	Sycamore Lane Elementary	115	53.9	46.1	51.3	14.8	16.5	17.4	14.8	67.0	.
Alpha Academy Charter	Alpha Academy Charter	101	46.5	53.5	56.4	20.8	10.9	11.9	9.9	30.7	4.0
Falls Lake Academy	Falls Lake Academy	81	53.1	46.9	14.8	9.9	7.4	67.9	12.3	12.3	.
Sugar Creek Charter School	Sugar Creek Charter School	88	42.0	58.0	84.1	14.8	1.1	.	5.7	86.4	9.1
Invest Collegiate	Invest Collegiate	35	60.0	40.0	85.7	.	5.7	8.6	8.6	51.4	.
The Academy of Moore County	The Academy of Moore County	68	54.4	45.6	5.9	10.3	14.7	69.1	10.3	10.3	.
D.C. Virgo Preparatory School	D.C. Virgo Preparatory School	20	45.0	55.0	90.0	.	.	10.0	25.0	80.0	.

2021–22 PILOT VOLUNTEER SCHOOL DEMOGRAPHIC INFORMATION
Grade 7 Math Demographic Sample Based on 2020–21 Grade 6 Enrollment Data

LEA Name	School Name	All	Gender (%)		Ethnicity (%)				SWD (%)	EDS (%)	ELs (%)
			Female	Male	Black	Hispanic	Other	White			
Caldwell County Schools	Gateway School	5	.	100	20	20	20	40	60	40	.
Caldwell County Schools	Collettsville School	28	39.3	60.7	3.6	14.3	3.6	78.6	17.9	57.1	.
Caldwell County Schools	Gamewell Middle	141	44	56	7.8	21.3	12.1	58.9	14.9	70.2	5.7
Caldwell County Schools	Granite Falls Middle	201	48.3	51.7	2	7	5.5	85.6	13.9	39.8	1
Caldwell County Schools	Happy Valley Elementary	25	60	40	.	.	12	88	16	64	.
Caldwell County Schools	Hudson Middle	193	45.6	54.4	1.6	9.3	5.2	83.9	6.7	47.7	1.6
Caldwell County Schools	Kings Creek Elementary	16	43.8	56.3	.	6.3	6.3	87.5	25	62.5	.
Caldwell County Schools	William Lenoir Middle	183	57.4	42.6	10.9	19.7	6.6	62.8	9.8	55.7	6.6
<i>Caldwell County Schools</i>	<i>Oak Hill Elementary</i>	<i>Data not available</i>									
Greene County Schools	Greene County Middle	202	47.5	52.5	38.6	35.1	2.5	23.8	12.9	50.5	8.9
Richmond County Schools	Ellerbe Middle	76	60.5	39.5	25	30.3	9.2	35.5	9.2	52.6	14.5
Richmond County Schools	Hamlet Middle	131	56.5	43.5	39.7	11.5	13.7	35.1	20.6	66.4	2.3
Richmond County Schools	Rockingham Middle	191	50.3	49.7	42.9	9.4	10.5	37.2	13.1	68.1	4.2
Richmond County Schools	Cordova Middle	85	51.8	48.2	25.9	21.2	9.4	43.5	12.9	68.2	11.8
Alpha Academy Charter	Alpha Academy Charter	91	49.5	50.5	58.2	24.2	7.7	9.9	3.3	28.6	2.2
Sugar Creek Charter School	Sugar Creek Charter School	50	40	60	82	14	4	.	10	82	6
Invest Collegiate	Invest Collegiate	51	43.1	56.9	74.5	13.7	11.8	.	15.7	45.1	.
<i>The Academy of Moore County</i>	<i>The Academy of Moore County</i>	<i>Data not available</i>									
D.C. Virgo Preparatory School	D.C. Virgo Preparatory School	28	39.3	60.7	92.9	3.6	.	3.6	25	64.3	.

2021–22 PILOT VOLUNTEER SCHOOL DEMOGRAPHIC INFORMATION
Grade 4 Reading Demographic Sample Based on 2020–21 Grade 3 Enrollment Data

LEA Name	School Name	All	Gender (%)		Ethnicity (%)				SWD (%)	EDS (%)	ELs (%)
			Female	Male	Black	Hispanic	Other	White			
Caldwell County Schools	Baton Elementary	50	52	48	2	2	6	90	16	56	.
Caldwell County Schools	Horizons Elementary	10	20	80	10	.	10	80	60	90	.
Caldwell County Schools	Collettsville School	40	55	45	.	2.5	.	97.5	2.5	60	.
Caldwell County Schools	Davenport A+ School	87	51.7	48.3	19.5	34.5	6.9	39.1	13.8	69	12.6
Caldwell County Schools	Dudley Shoals Elementary	71	43.7	56.3	1.4	4.2	4.2	90.1	12.7	53.5	2.8
Caldwell County Schools	Gamewell Elementary	60	51.7	48.3	13.3	8.3	6.7	71.7	8.3	61.7	1.7
Caldwell County Schools	Granite Falls Elementary	97	46.4	53.6	5.2	8.2	7.2	79.4	7.2	34	4.1
Caldwell County Schools	Happy Valley Elementary	19	31.6	68.4	.	5.3	.	94.7	.	68.4	.
Caldwell County Schools	Hudson Elementary	114	55.3	44.7	0.9	9.6	7	82.5	6.1	51.8	6.1
Caldwell County Schools	Kings Creek Elementary	14	50	50	7.1	.	.	92.9	7.1	78.6	.
Caldwell County Schools	Lower Creek Elementary	64	46.9	53.1	.	6.3	9.4	84.4	17.2	39.1	.
Caldwell County Schools	Sawmills Elementary	54	46.3	53.7	3.7	11.1	1.9	83.3	9.3	51.9	5.6
Caldwell County Schools	West Lenoir Elementary	43	44.2	55.8	18.6	25.6	9.3	46.5	9.3	65.1	2.3
Caldwell County Schools	Whitnel Elementary	46	58.7	41.3	6.5	17.4	10.9	65.2	21.7	78.3	8.7
<i>Caldwell County Schools</i>	<i>Oak Hill Elementary</i>	<i>Data not available</i>									
<i>Greene County Schools</i>	<i>Greene County Intermediate</i>	<i>Data not available</i>									
Haywood County	Hazelwood Elementary	89	46.1	53.9	.	13.5	7.9	78.7	21.3	41.6	5.6
New Hanover Schools	Carolina Beach Elementary School	78	48.7	51.3	.	1.3	1.3	97.4	14.1	20.5	.
New Hanover Schools	Ogden Elementary School	103	46.6	53.4	3.9	4.9	1.9	89.3	3.9	8.7	1
New Hanover Schools	Masonboro Elementary School	78	48.7	51.3	3.8	11.5	3.8	80.8	7.7	11.5	.
Richmond County Schools	East Rockingham Elementary	68	41.2	58.8	26.5	14.7	8.8	50	17.6	72.1	8.8
Richmond County Schools	Fairview Heights Elementary	74	47.3	52.7	29.7	6.8	18.9	44.6	17.6	55.4	1.4
Richmond County Schools	L J Bell Elementary	77	46.8	53.2	35.1	3.9	11.7	49.4	7.8	55.8	2.6
Richmond County Schools	Mineral Springs Elementary	56	46.4	53.6	25	16.1	19.6	39.3	25	58.9	10.7
Richmond County Schools	Monroe Avenue Elementary	63	49.2	50.8	55.6	4.8	14.3	25.4	9.5	79.4	3.2
Richmond County Schools	West Rockingham Elementary	40	52.5	47.5	30	15	7.5	47.5	15	65	10
Richmond County Schools	Washington Street Elementary	69	43.5	56.5	60.9	1.4	11.6	26.1	11.6	65.2	4.3
Alpha Academy Charter	Alpha Academy Charter	101	46.5	53.5	56.4	20.8	10.9	11.9	9.9	30.7	4
Sugar Creek Charter School	Sugar Creek Charter School	72	40.3	59.7	83.3	15.3	1.4	.	2.8	87.5	11.1
Invest Collegiate	Invest Collegiate	35	60	40	85.7	.	5.7	8.6	8.6	51.4	.
D.C. Virgo Preparatory School	D.C. Virgo Preparatory School	20	45	55	90	.	.	10	25	80	.

2021–22 PILOT VOLUNTEER SCHOOL DEMOGRAPHIC INFORMATION
Grade 7 Reading Demographic Sample Based on 2020–21 Grade 6 Enrollment Data

LEA Name	School Name	All	Gender (%)		Ethnicity (%)				SWD (%)	EDS (%)	ELs (%)
			Female	Male	Black	Hispanic	Other	White			
Caldwell County Schools	Gateway School	6	.	100	33.3	16.7	16.7	33.3	50	50	.
Caldwell County Schools	Collettsville School	28	39.3	60.7	3.6	14.3	3.6	78.6	17.9	57.1	.
Caldwell County Schools	Gamewell Middle	145	43.4	56.6	8.3	20.7	11.7	59.3	16.6	71	5.5
Caldwell County Schools	Granite Falls Middle	202	49.5	50.5	2	6.9	5.9	85.1	12.4	40.6	1
Caldwell County Schools	Happy Valley Elementary	25	60	40	.	.	12	88	16	64	.
Caldwell County Schools	Hudson Middle	197	46.7	53.3	1.5	9.1	5.1	84.3	7.1	47.7	1.5
Caldwell County Schools	Kings Creek Elementary	20	45	55	.	10	5	85	20	60	.
Caldwell County Schools	William Lenoir Middle	185	56.2	43.8	11.9	19.5	5.9	62.7	8.1	56.8	6.5
Caldwell County Schools	Oak Hill Elementary	Data not available									
Cherokee Central Schools (Federal)	Cherokee Middle	Data not available									
Greene County Schools	Greene County Middle	197	47.2	52.8	39.6	33.5	2.5	24.4	10.2	49.7	8.6
Johnston County Schools	Cleveland Middle	362	47.8	52.2	19.6	19.9	9.1	51.4	8.8	26	4.7
Montgomery County Schools	Invest Collegiate	55	41.8	58.2	76.4	12.7	10.9	.	16.4	49.1	.
Montgomery County Schools	Montgomery Learning Academy	2	50	50	.	.	50	50	50	100	.
Montgomery County Schools	East Middle	166	46.4	53.6	13.9	52.4	6	27.7	9.6	77.1	9.6
Montgomery County Schools	West Middle	114	48.2	51.8	25.4	11.4	7.9	55.3	14	68.4	.
Richmond County Schools	Ellerbe Middle	78	60.3	39.7	26.9	29.5	9	34.6	10.3	53.8	14.1
Richmond County Schools	Hamlet Middle	135	55.6	44.4	38.5	11.1	14.8	35.6	20.7	66.7	2.2
Richmond County Schools	Rockingham Middle	193	50.8	49.2	43	9.8	10.4	36.8	12.4	68.9	4.7
Richmond County Schools	Cordova Middle	87	50.6	49.4	27.6	21.8	8	42.5	11.5	67.8	11.5
Scotland County Schools	Carver Middle School	218	42.7	57.3	45.4	4.6	19.3	30.7	21.6	66.1	0.5
Scotland County Schools	Shaw Academy	1	.	100	100	.	.	.	100	100	.
Alpha Academy Charter	Spring Hill Middle	212	45.8	54.2	53.3	3.3	23.1	20.3	22.2	64.6	1.4
Falls Lake Academy	Alpha Academy Charter	91	49.5	50.5	60.4	24.2	5.5	9.9	2.2	28.6	2.2
Sugar Creek Charter School	Falls Lake Academy	83	51.8	48.2	9.6	3.6	13.3	73.5	12	12	.
Invest Collegiate	Sugar Creek Charter School	51	41.2	58.8	84.3	13.7	2	.	7.8	82.4	5.9
D.C. Virgo Preparatory School	D.C. Virgo Preparatory School	28	39.3	60.7	92.9	3.6	.	3.6	25	64.3	.

Part IV Appendices

Exhibit IV-01 September 2020 NCTA Meeting (Day 2)



Public Schools of North Carolina

NC Technical Advisors Meeting

September 17–18, 2020

AGENDA–Day 2

- **Innovative Assessment Design Update and, Timeline**
- **COVID-19 and Implications to Testing and Field Test plan**
- **Lunch**
- **Other Business, Next Meeting**

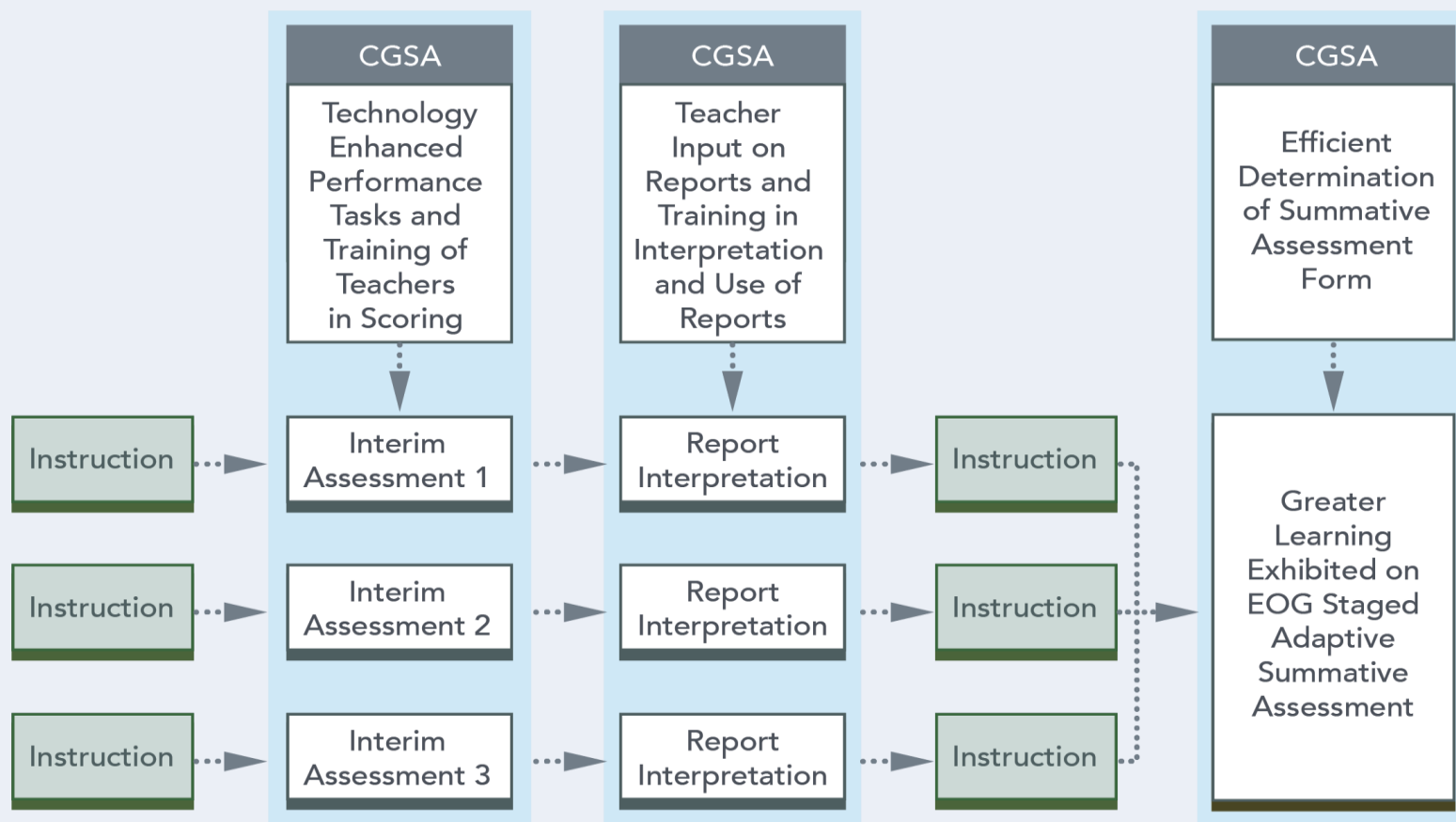
NCPAT Design Update

- NCDPI Partnered with WestEd and applied for a CGSA grant in response to
 - *Priority 1: Implementing the Innovative Assessment Demonstration Authority.*
- The CGSA grant focus is to:
 - strengthened NCPAT design use of innovative item types to allow a greater range of ways for students to represent their knowledge and mastery of standards.
 - These innovative items will take the form of technology enhanced performance tasks and will be leveraged through classroom assessment reports designed to impact instruction.

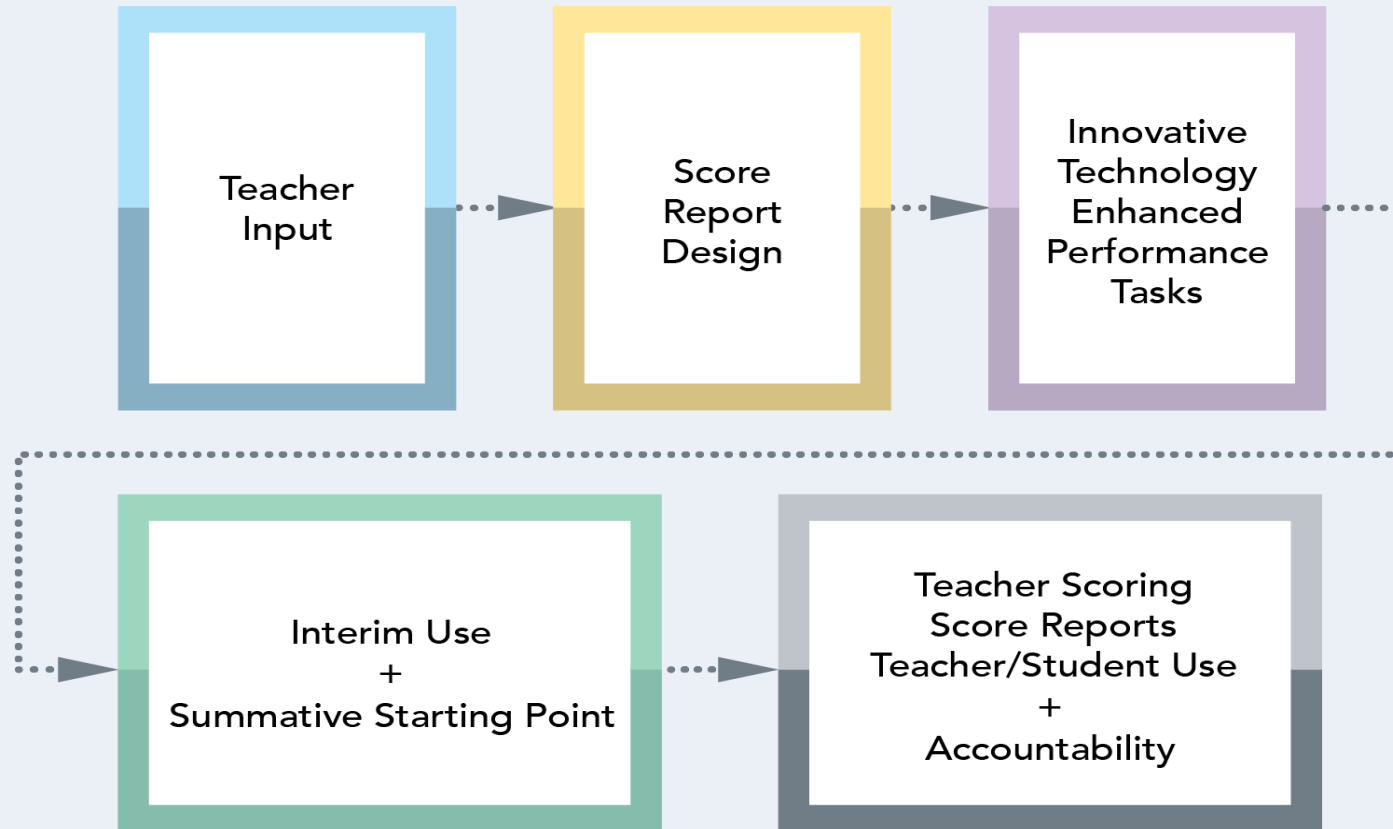
CGSA Enhancement

- **Involve educators in information gathering to inform score reports and assessment design**
- **Design, develop, and evaluate technology enhanced performance tasks for their effectiveness to measure higher cognitive expectations of North Carolina content standards, their utility in engaging students and providing teachers with useful information to support instructional interventions to meet student needs, and their role in defining the starting point for the staged adaptive summative assessment**
- **Determine the measurement model most appropriate for the interim assessments and for the use of the performance tasks in the weighting of the through-grade interim assessments to achieve the most efficient starting point for the adaptive summative solution**

NCPAT Assessment System Overview



The End in Mind from the Beginning



NCPAT Timeline

Pilot Year	School Year	Grade and Subject
1	2019–20	Planning Year
2	2020–21	Innovative item development and tryout for mathematics and reading
3	2021–22	4 – Mathematics and Reading 7 – Mathematics and Reading
4	2022–23	4 – Mathematics and Reading 5 – Mathematics and Reading 7 – Mathematics and Reading 8 – Mathematics and Reading
5	2023–24	3–8 – Mathematics and Reading

AGENDA–Day 2

- **Innovative Assessment Design Update and, Timeline**
- **COVID-19 and Implications to Testing and Field Test plan**
- **Lunch**
- **Other Business, Next Meeting**

Field Test Design

- NCDPI uses an embedded field test design to tryout new items for form development
- A random groups concurrent design is used to calibrate and place field test item parameters on the existing operational IRT scale.

EOG Math Grade 4 Embedding Plan

EOG	Form	Flavor	Mode
Math Grade 4	M	20	Online
Math Grade 4	O	20	Online
Math Grade 4	A	14	Paper and Quantile
Math Grade 4	C	14	Paper and Quantile

Field Test Design

- With school districts across the state operating on very different reopening plans what important steps does the TAC recommend as we develop item analysis plans for 2021?
- What are some key criteria we need to establish when evaluating if field test item parameters are reliable?
- What steps can we take to account for variances in instructional access such as opportunity to learn on field test statistics?

Exhibit IV-02 March 2021 NCTA Meeting (Day 2)

NC Technical Advisors Meeting

The North Carolina Department of Public Instruction

March 17th and 18th , 2021



AGENDA – DAY 2

- **Innovative Assessment Updates**
- **Impact of Covid-19 on IADA Development and Implementation**
- **IADA and NC Check-Ins Interims**
- **Lunch**
- **Long Term Impact of Covid-19 on assessment**
- **Other Business and Next Meeting**

COVID Impact

NC Personalized Assessment Tool 2019–2021

Item
Development

Form
Development

Professional
Development

Cognitive Labs

Field Testing

Feedback

Interviews and Surveys

NC Personalized Assessment Tool Development Schedule

Year	Development Activity
2019–20	Planning Year with Item Development
2020–21	Test Specifications, Item Development, and Professional Development
2021–22	Administer Grades 4 and 7 Mathematics and Reading
2022–23	Administer Grades 4–5, 7–8 Mathematics and Reading
2023–24	Administer Grades 3–8 Mathematics and Reading

Theory of Action

Goal <i>What is the overarching goal(s) of the system?</i>	Outcomes <i>What specific outcomes represent goal attainment?</i>	Elements/Components <i>What approaches, initiatives, and components need to be in place to support attainment of outcomes?</i>	Mechanisms <i>What is the mechanism by which each element of the system will support the attainment of desired outcomes?</i>	Assumptions <i>What assumptions underlie the system working as intended?</i>	Evidence <i>What evidence will demonstrate that the system is working as intended?</i>	Consequences <i>What are the potential intended/unintended consequences?</i>
Intentional through-grade use of assessment data to support teaching and increase student achievement	<p>A balanced assessment system consisting of formative, interim, and summative measures</p> <p>Increased achievement (short term/long term)</p> <p>Reduced achievement gaps</p> <p>Increased assessment and data literacy</p>	<p>Through-grade assessments (interims)</p> <p>Staged-adaptive summative</p> <p>Assessment of higher order thinking skills</p> <p>Professional development in assessment literacy with common language of formative assessment</p> <p>Immediate teacher feedback</p> <p>Student reports</p>	<p>Variety of item types (e.g., TEI, performance tasks)</p> <p>Online reporting</p> <p>Professional development via training modules that can be accessed at any time:</p> <ul style="list-style-type: none"> Regional coaching Online PD modules on assessment and data literacy Online PD modules on the assessment system Training on misconceptions 	<p>Data will be reviewed and used by educators.</p> <p>The system will provide valid and reliable data.</p> <p>The test is aligned to content standards.</p> <p>Teachers will integrate their increased understanding of assessment and data in their day-to-day practices.</p>	<p>Increased student achievement and growth</p> <ul style="list-style-type: none"> Higher percentage of districts meeting long-term goals (designed to close achievement gaps) (links to plans – ESSA, SBOE) Reduction of low performing schools, districts, and charter schools (link to SBOE) 	<p>Intended:</p> <p>Students have more timely feedback on their performance so that they can improve.</p> <p>Teachers have actionable information so that they can use it to change instruction for students.</p> <p>Unintended:</p> <p>Interims become high stakes.</p> <p>Increased stress around testing</p> <p>Testing perceived as increased testing (interims)</p> <p>Impact on local pacing guides</p>

Elements and Components

- Through-grade assessments (3 Interims)
- Staged-adaptive summative assessment
- Assessment of higher order thinking skills
- Professional development
- Immediate teacher feedback
- Student reports

Partnership with The Friday Institute for Educational Innovation

- Professional Development
- Cognitive Labs
- Research to Support Continuous Improvement



Friday Institute Interview Feedback

- Pacing and Alignment
 - No state pacing guide
 - Three domains needed for proficiency indicator
 - Open window
- Assessment Logistics
 - Dynamic reports in NCAdmin
 - NCPAT interims remain low-stakes
- Communications
 - Purpose
 - Design

AGENDA – DAY 2

- Innovative Assessment Updates
- Impact of Covid-19 on IADA Development and Implementation
- IADA and NC Check-Ins Interims
- Lunch
- Long Term Impact of Covid-19 on assessment
- Other Business and Next Meeting

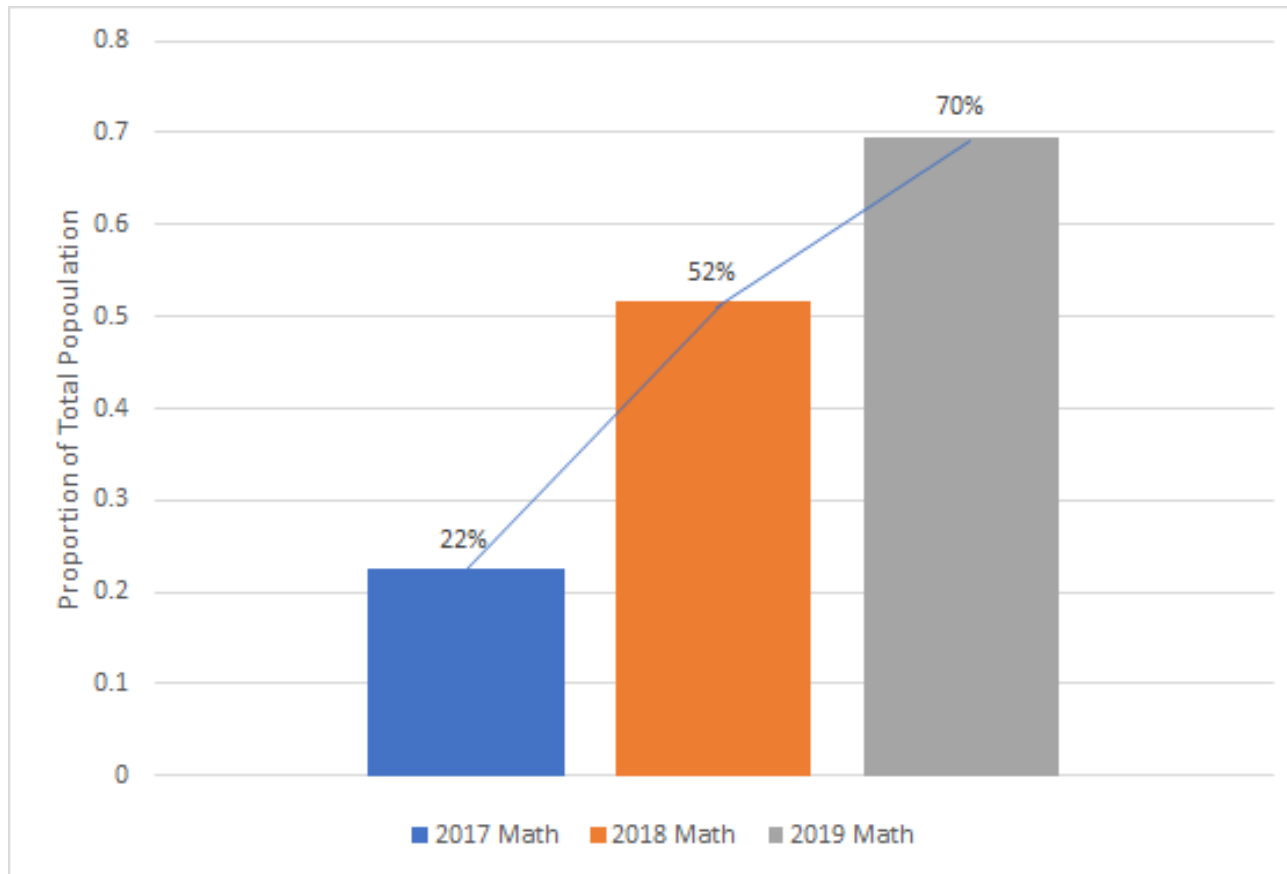
Journey Towards a Balanced Assessment System

- In 2015 NCDPI designed and administered the first iteration of interim assessments with the vision of moving towards a through-grade model.
 - The Proof-of-Concept in mathematics grade 5 and Reading grade 6 was administered to a small sample of about 5% (~4000 students) at each grade.
 - It consisted of 3 interim assessments administered during fixed windows during the school year.
- The main purpose of these interims was to :
 - Provide detailed and immediate feedback so ongoing instruction could be tailored to help students master skills and grade level standard expectations.
- Interim data was only for formative uses by teachers and school administrators.

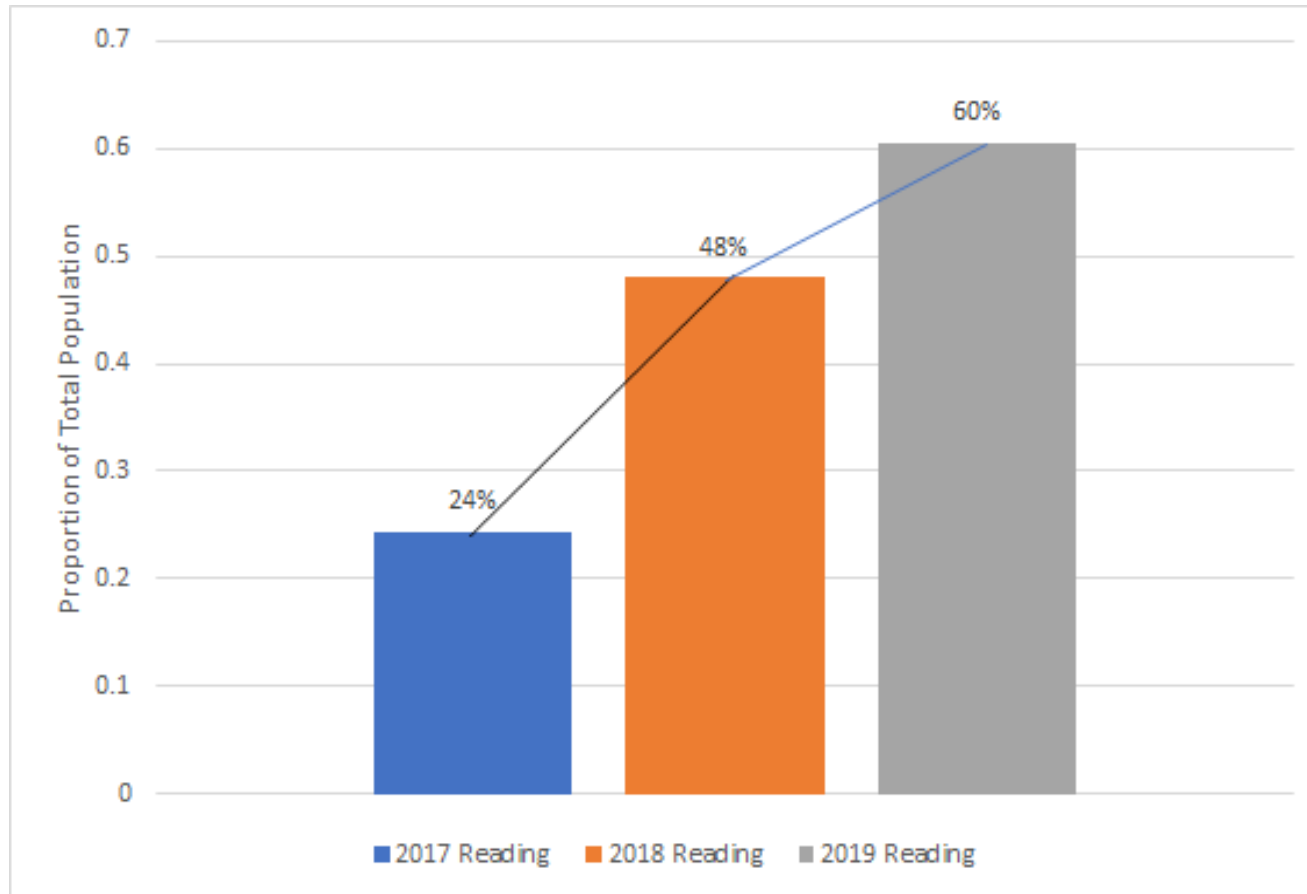
Journey Towards a Balanced Assessment System: NC Check-Ins

- Feedback from teachers who participated in POC was very positive.
- In 2016 the POC interims officially became known as NC Check-Ins and was available to all schools in the state on a voluntary base.
- In 2017 NC Check-Ins interims were expanded to more grades:
 - Mathematics: Grades 4 – 6
 - Reading: Grades 5 – 7
- NC Check-Ins continues to receive positive support from school districts as a formative resource in providing teachers with timely feedback assessment data.
- As of 2020 we have NC Check-Ins for grades 3 – 8 in mathematics, reading and science.

Grade 5 Mathematics NC Check-In Student Participation (2017 N=117,364; 2018 N=121,569; 2019 N=121,955)



Grade 6 Reading NC Check-In Student Participation (2017 N=114,150; 2018 N=117,966; 2019 N=121,709)



Journey Towards a Balanced Assessment System: IADA

- Under the IADA tryout period NCDPI hopes to enhance the purpose of NC Check-Ins framework from:
- *an interim classroom assessment designed to provide teachers with on-time data to help guide instruction*
- to also
- provide data that will be used to inform an end-of-year multi-stage fixed adaptive summative used for accountability and ESSA reporting.

Journey Towards a Balanced Assessment System: IADA Interims

- New Features of NC Check-Ins:
 - Single flexible administration window for all three interims to accommodate with different curriculum across the state.
 - Transition to upgraded online dynamic reports
 - An on-track proficiency indicator will be reported for each interim.

AGENDA – DAY 2

- Innovative Assessment Updates
- Impact of Covid-19 on IADA Development and Implementation
- IADA and NC Check-Ins Interims
- **Lunch**
- **Long Term Impact of Covid-19 on assessment**
- **Other Business and Next Meeting**

State Assessment and Covid-19 Impact

- Covid-19 has changed the business-as-usual state assessment landscape.
- We are now considering things like
 - Remote test administration
 - Expanded test window
 - Shorter summative assessments
 - Accountability waivers on assessment uses
 - Non-Equivalent groups across years
- What are some general considerations NCDPI must consider moving forward?

AGENDA – DAY 2

- Innovative Assessment Updates
- Impact of Covid-19 on IADA Development and Implementation
- IADA and NC Check-Ins Interims
- **Lunch**
- **Long Term Impact of Covid-19 on assessment**
- **Other Business and Next Meeting**

Next Meetings

- Thursday and Friday
 - September 16th and 17th 2021
- Thursday and Friday
 - March 17th and 18th 2022

Thank You

Continue to stay safe!

Exhibit IV-03 NCTA Meeting September 2020 Notes (Day 2)



FOR: North Carolina Department of Public Instruction
FROM: OAERS
SUBJECT: Technical Advisory Meeting Notes (Fall 2020)
DATE: October 4th 2020

DAY 2 (18 September 2020)

1. IADA Update and Timeline

CGSA Grant Overview

- The main focus of the CGSA grant was to help with implementation and to see if they can work with DPI to incorporate innovative assessment items by designing technologically enhanced (TE) items.
- The CGSA Enhancement prioritizes:
 - Involve educators in design and information gathering for score report development.
 - Develop tech-enhanced performance tasks to measure higher cognitive function for formative purpose.
 - These items would be part of interim assessments and not necessarily integrated into measurement or routing models. The interim assessment will be an additional resource for teachers.
 - If the tasks are open-ended, train teachers to score tasks so everything stays at the school level.
 - Collaborate with CGSA to work on measurement design and incorporate the scores into routing and assigning kids to the starting model. Items may eventually be included in a summative assessment form.
 - Timeline is a 3-year grant.
 - The goal is to start with the end in mind. Start with asking teachers what kind of data they need from score reports before designing items and also how to improve current reports that DPI has.
 - The grant would take DPI in a new direction making sure as it transitions to the interim system. DPI will be able to deliver an assessment that is more aligned to the public and test users from their end. Some TE items are glorified MCQ but this is a good partnership to potentially build capacity to make some gains in that area.

Assessment Design and Score Reports (TAC Responses)

- Start with a score report (or score scale) design. Considering your evidence requirements helps you decide what type of task gives you that evidence. The big danger is that you can pick item types, but if you are not clear on what it is giving you and why, it is not very useful.
- Bradley McMillen asked if DPI has thought about the standards it is targeting with these tasks. DPI replied part of the first step is to align item tasks with standards. TAC responses:
 - Content standards are not assessment standards. Neither NGSS or Common Core are written in a way that is assessable. First, formulate content standard into a statement that can be assessed by any item type.

North Carolina Department of Public Instruction – Technical Advisory Board Meeting

- Interesting question for Math. We do not directly assess those skills. Would this be an alignment issue?
- Alignment starts with something that wasn't crafted for design purposes. It is not amenable to good design, and yet we proceed anyhow as if it were and then spend the rest of the time trying to explain what scores mean in light of the nebulous taxonomy. There is confusion out there about higher-level cognitive thinking skills. For example, if students are on the lower end of scale, then there is no point in giving them difficult tasks. Scaffolding can be used for lower performers even if they do not need DOK 3, 4, etc. Look at how scaffolding is used in task design and assessment progression.
- Immediate feedback is also needed. The qualitative data of how students and teachers interact in the moment informs the story. Cooperate with districts to gather that information.
 - One of Bob Brennan's must-read articles is on balanced assessment. Focuses on different levels: what happens in the classroom should complement what happens on district and state levels.
 - DPI should include the day-to-day interactions between teachers and students.
 - The complication is that DPI operates at the state level. Collaboration with curriculum and instruction colleagues is needed. DPI focuses primarily on the assessment side.
- In terms of educator involvement in item design, be clear you want to know what they need to know about students but not let them dictate how to get there. Gets back to item type arguments.
 - Do not assume certain types of validity with performance tasks. Face validity and authenticity have no criteria, so this cannot be the deciding factor.
 - Start using this as a way of getting to engaging data. If these instruments are instruction-sensitive, then teachers acting on them should result in positive change, whether or not that translates into a summative score. We really want to see some change and that is where the instruction-sensitivity of metrics becomes relevant.
- Information should be different for interim and summative. If you have the same report, you are not giving teachers any different information.
 - Releasing items or at least item-level data is helpful.
 - However, the challenge with giving items is if we depend on a scale, the scale is very hard for teachers to translate to content. What do students know or not know based on scale scores?
 - Consider issuing reports early on in the development process, especially if the interims are going to provide something different. Review reports from MAP, iReady and see what type of information DPI wants to provide. Think about what providing instructionally useful information might look like.
 - Interim assessment reports are sometimes unreliable, given the small item set. Caution against over interpretation. Graph additional types of information that are

coming from different item types that may have certain types of characteristics. If you have a task model, then these are the types of information we want.

- Developmental/assessment progressions are difficult to do, and very few companies can say they have done that.
- While score reports are important, focus on the questions themselves - are they measuring what you wanted them to measure? In creating a scale, ask what one point means. Go point-by-point through the scale in item development, and build the scale accordingly. Content is not distributed uniformly across the scale, and progression charts that out.
- Involve teachers in the process of performance task development and review. Ask teachers to what extent their work, such as hand-graded homework, can be turned into measurable or scorable tasks. Also consider having teachers review performance tasks to see if their students could complete them based on what is taught in class. If these tasks were to be placed on a test, would teachers spend more time on how to perform the tasks versus teaching the material?
 - Questions can be included in cognitive labs or focus groups. It is important to hear the student voice as well.
 - This process is more aligned with true formative assessments.
 - If DPI is going to get teacher feedback, then sharpen feedback by sharing your theory of action with teachers. There are 2 ways teachers could take this:
 - Sending a signal to the field that they must start teaching at a deeper level; or
 - Using a diagnostic tool to unpack student misconceptions and why they do not get the standard.
- Performance tasks are less accessible to some students. Be careful not to introduce construct-irrelevant variance that hurts rather than helps some students.
- States using performance tasks and trying to link them to actual skills:
 - New Hampshire and Colorado have extensive item banks.
 - Student Achievement Partners – Shelbi Cole, Smarter Balanced TAC. In particular, practices crossed with content. They have a lot on their website, Achieve the Core.
 - Vendors work on these. Do not think of them as unique items, but a family of items. Consider irrelevant method variance factors. Calibrate the entire family so you do not have a few expensive items depleted quickly through use.

Equating and Scaling of Interim Assessments (TAC Responses)

- Scaling is intended to be adaptive, but summative and interim are different.
- Interims will be used as a prior to give a start location for the final summative assessment. There is no need for a traditional scale, and DPI does not report the interim assessments on a scale.
- Routing analysis will divide up interim performance into 2-3 groups
 - DPI has a recommendation from a feedback meeting to include a performance indicator that could serve as an early warning metric on interim. DPI has not explored the technical details of how to work that out.
 - Common item equating is only applicable to the final summative assessment.

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- A TAC member indicated that if DPI is using the scores of interims as priors, that may weaken the predictive ability of the priors. Ensure that there is enough recovery space in each form.
 - If teachers are taking data from, the interim to address student needs, they should behave differently on the summative assessment. Even if a student is misrouted, DPI is trying to build in sufficient recovery space.
 - The two forms are modestly adaptive and do not have major differences between them. Main the students in the center that will be routed differently (or potentially incorrectly). Even with good formative intervention, a level 1 is unlikely to go to level 5.

2. COVID-19 and Implications for Testing and Field Testing

- The initial timeline was to pilot math grade 4 and 7 but there are delays because of COVID-19. Field testing items in Spring 2021 and then next year Spring 2022, NCPAT system pilot for grade 4 and 3 for math and reading.
- New timeline:
 - Grades 4 and 7 – 2021-2022;
 - Grades 4, 5, 7, and 8 – 2022-2023.
- Puts us back on our 5-year period ending 2023-2024. The field test plan is critical to build summative forms at the end of the year.
- Field test design - random groups design.
 - Each form has 6 field test locations (or flavors or version) randomly administered across the state.
 - Quantile validation study – quantile linking items.
 - Each base form has 34 flavors. Total 68 flavors to be administered to the entire state.
 - Target: between 1200 - 1500 students seeing each field test item with a sample size of 120,000 per grade. Given the current situation, randomness can no longer be assumed.

Field Testing

- There are 50,000-60,000 students not coming back till spring, remaining virtual.
- Even for students who are virtual, is there a possibility to arrange for them to test at a designated area? State law requires students to be tested during 5-day window at the end of semester. The logistics are challenging because there are 83,000 students who engage in virtual instruction.
- The state board of education voted to allow schools to bring students back on site or at a designated safe area. Currently only for BOG3 and come EOG/spring testing, bound by state law. DPI worked with the General Assembly regarding changes in the state law to address the EOG window, but the General Assembly is currently out of session.

North Carolina Department of Public Instruction – Technical Advisory Board Meeting

- The current testing window is a 10-day window for EOG. The issue is the implications for NCPAT. In Jan-Feb, it is unclear whether there will be enough indicators to pull out field tests items. Is it worth exposing the forms if no data is being collected?
- Standalone field tests are not a viable alternative, given DPI was applauded by the state board for cancelling them, and the field tests present issues with student motivation.
- What are other states doing? What is the best approach? (TAC responses:)
 - Even if you could create a nonequivalent group design, learning loss could still be a problem.
 - If you are embedding items, then examine person fit. Also look at telemetry data, log data (mode of administration) and link to features in addition to demographics. This does not answer what to do but indicates whether to build score tables and where to redesign significant problems.
 - With something close to census testing, you are randomizing within a big sample. This year you are not sure about getting a representative sample. Are instructional conditions this year representative of the future? If not, then the parameters might change and test performance will be sensitive to that.
 - The challenge is that you can check representation with respect to demographics, but unless you know about the instructional experience, you don't know how representative that sample is. You may have person fit but a biased sample.

Data Collection - Survey re: Instructional Experience

- DPI could collect data on instruction across the state. But what kind of data and from whom? Is it a survey of districts, teachers, parents or a combination? Do we need both quantitative and qualitative data to conclude that a certain type of instruction is comparable across different districts? (TAC responses:)
 - Are teachers attempting to teach the entire body of content standards at the depth or level that they would have done before? What is the level of student engagement? Teachers may be trying to do that, but if students are remote then it is difficult for teachers to enforce engagement.
 - Surface characteristics are not sufficient. Look behind the remote vs. hybrid label. Delve deeper to see what is being taught and how students are responding to instruction.
 - The survey should include levels of engagement. This could be operationalized as the percentage of time students are engaged online, homework assignments done, etc.
 - How much of the curriculum is covered? Some can cover all, others may not be able to do that. Schools start at different times. Investigate the depth at which this content is taught.
 - Some schools really dialed back instruction and even eliminated homework. This data may not be available.
 - Can we think about this like what they do with ACT? Add a survey with 5 questions (e.g., what proportion of the school year was hybrid and in person)? Collect data with scores.

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- Clarify what you mean by hybrid instruction in the surveys, otherwise you will get someone else's interpretation of what they heard that is.

Calibration of Field Test Data

- Most students are able to be tested but not remotely. It may be that by January or February DPI will know how that looks. If it looks like 20% of students are missing, then call off field test. DPI may not know what to do with the data collected.
- If students do come back, and field tests are possible, DPI cannot address all the instructional differences. Disaggregated data and lots of decisions to make. Instructional differences impact item difficulties. DPI will not be able to use data for calibrations and interpret item difficulty like it is true item difficulty. Any ideas on what we can do? Adjust backwards? Hold the scale to original item parameters of last year and put everything onto last year's scale? (TAC responses:)
 - How badly do you need item parameters for new items to make 2022 function? If you cannot test in 2022 unless you calibrate some more items in Spring 2021, then that reduces your ability to choose not to field test.
 - Perhaps have relatively few embedded items, and since the majority of testing is online, you can do random assignment of forms. Classroom clustering will not be needed.
 - Calibrating new items based on old item fixed parameters will adjust for shifts in overall difficulty. There is no way to adjust with differential shifts in difficulty in 1 year due to instructional differences. Parameters may not be the best, but it is something you can do. Asterisk items born in 2021, and recalibrate in 2022 to check for differences.
 - Avoid saying that these parameters are the only estimates ever going to get for these items. They can be updated in future. Consider an early-return calibration plan. Do multistage calibrations to isolate population priors based on that multigroup analysis which may help you get to something usable.
 - Can also check if anchor items on new data are linearly related to old data. If some items are out of bounds, remove them from the anchor set. If the anchor set stays linear with the old values, that is evidence the bank is not moving around much. The amount of movement in the anchor set impacts the strength of the asterisk.
 - Take the operational data, recalibrate operational items and compare parameters to the existing parameters to see if they are linearly related. This will require an enormous sample size. Cut it down to make it practical. Looking at that relationship would give you evidence of whether some items measuring some topics are becoming easier or difficult.
 - This may hold only up to a certain point. Caveat: do not go through the motions. Too far apart, the information structure relative to population starts changing, and we are not sure if IRT anchor equating works under those conditions.
 - If the relationship is not strong or wide, then this year it won't work. It gives a little sense of whether scale is staying true to the spacing of items across content and content balancing in anchor items. This year is so different. Content balancing on

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anchor set is important in evaluating whether the scale is working. There is nothing in IRT about content balancing. It's Tucker-Lewis.

- If DPI fixes item parameters to previous year and then calibrate, we may have to rethink our pre-scoring model for assessments based on items field tested in 2021 and pause release of scores until we get early return data. Also, cannot release items with an asterisk.
- This is consistent with other states. Consider taking operational data, and recalibrating just operational to compare to existing. See if there is a linear relationship. Looking at that relationship would give you a sense if some items on some topics are moving around because, for example, someone did not teach a given topic.
- There are ways you can do calibrations (*e.g.*, multigroup design). Do not let new items contribute in wholesale to the posterior distribution. This prevents new items from contaminating the population group.
- Sample size will be 1200-1500 per item. Depending on how many students come to test, the sample size is significantly smaller, will the 3PL model still work?
 - The sample size may drop. That is a concern but do not change the model. Anticipate before the testing window starts whether you will have census testing. If not, reduce the number of flavors. Better to have an adequate sample to calibrate embedded items than to embed and not be able to calibrate them. Redoing an embed plan is easy.
 - Block the items by primary content and by difficulty (easy, medium or difficult blocks). Fix the a -parameter means to the block mean with a tight prior (*i.e.*, don't "float" those means or relax the SDs of the item priors). That type of constrained estimation may help stabilize the solutions; not fit better, just be more stable.

Reporting Data

- Overarching question is whether we are using remote assessment to collect data to evaluate effectiveness of remote instruction, or simply to give students what they would have received in school?
- Other states are now developing plans about when they should not be reporting data. Develop a plan for all assessments: when can DPI report and feel comfortable? It is hard to plan - have a plan A, B and C. Articulate an approach across all testing plans to communicate relative stability.
- The fairness issue is serious. Consider additional analyses to determine if you truly are being fair to all students. If someone approaches you, it is important to have evidence of the validity of inferences you are making. How do you know they are not doing well because of the test?
- Some states are considering not reporting at the student level but wrapping up to the school or district level.

Subgroup Analysis

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- Generally, DPI reports out on all federal subgroups. Any recommendations?
 - Rural, urban, suburban
 - Gender
 - Instruction type/level
 - Student engagement

3. Next TAC Meetings:

March 17-18 2021

September 16 -17 2021

Exhibit IV-04 NCTA Meeting March 2021 Notes (Day 2)



FOR: North Carolina Department of Public Instruction
FROM: OAERS
SUBJECT: Technical Advisory Meeting Notes (Spring 2021)
DATE: March 29, 2021

DAY 2 (March 18, 2021)

1. Innovative Assessments Updates

- DPI Process so Far
 - Item development (cognitive labs)
 - Form development (field testing)
 - PD (feedback)
- Overview
 - Continued to develop items including tech enhanced; still intending to do cognitive labs for these tech-enhanced items
 - Survey to teachers regarding pacing and the need for formative data by standard
 - Format is a little different than NC Check-ins; need to assess standard from at least three domains
 - To account for pacing differences, opening window longer
 - TEI: grade 4 and 7 reading and math; tested in a pool in Spring's operational assessments
- Theory of Action
 - Proposed design of system
 - Rationale for design
 - Assumptions, evidence and consequence
 - Elements and Components
 - Building on success of NC Check-in's
 - Staged-adaptive summative assessment
 - Minimum of two interims to stage the summative
 - TAC Response:
 - Somehow someone gets from score report to understanding how to do effective content-based instruction; scale score is not enough to bridge that gap
 - Is this different than an item-analysis? Spell out in the theory of action
 - "Increase assessment literacy" don't limit in how to use the things in this system
- Friday Institute
 - Professional development for implementing the innovative assessment program
 - How to use data in a systematic way to inform instruction

- How to use formative assessment effectively
- How to create an action plan based on data
- Also conducting cognitive labs in grades 3-5 remotely
- Interview Feedback
 - Pacing and alignment: no statewide pacing guide; curriculum adaption is a local decision. In order to accommodate variety, surveyed standards and asked teachers to prioritize. Used results to choose standards, and interims can be taken in any order during window
 - TAC Response
 - Grain size of interims is important; if too big, not enough focused info; need to be compact and focused on a targeted set of outcomes
 - DPI: Teachers still have access to data afterwards; math is focused
 - What is the timeline?
 - DPI: continuous feedback cycle; right now on system itself and cognitive labs; at end of this year have a debrief; any final changes in fifth year before statewide rollout
 - DPI: how to ensure this is used as resource and not viewed as an assessment and test score
 - In training, show use cases where people are using more information than scale score; tell people it doesn't matter what they do with interims so that they are decoupled from the summative result
 - Look at reports of others who are working in this space (NWA, Renaissance, etc.); the cognitive labs are focused on students but invest more in finding out what teachers are doing and train them accordingly
 - Distractor Analysis
 - Think about intended use in designing score reports; give them exact direction on how to adjust instruction; leverage distractors to understand misconceptions
 - MN score reports gives a learning locator; takes you to a diagnostic approach, here are strengths and weaknesses and here are next steps as a parent; linking to pedagogical interventions
 - Think about distractors in a formative sense; if there is an idea about common misconception, have them deal with these; do not wait to recover what you can after the fact
 - Do not count on distractor analysis unless someone designs the distractors explicitly upfront to indicate something; think ECD
 - Distractor analysis and assessment literacy; general public think distractors are there as tricks; help teachers understand distractors are there to identify misconceptions

- DPI: when going into pedagogy, this can not come from assessment team; curriculum partners need to communicate that
- TAC: these should not be siloed observations; should work as teams
- DPI: discussed distractor analysis and providing to teachers over the past few years; the counterpoint is some schools wanted teachers to dig in and discuss items because that helps them understand standards better; we have added ability to sort and filter, but not anything like distractor analysis
- Assessment logistics: concern about “assessment” terminology and connotations; emphasize the NCPAT remains low stakes
 - TAC Response:
 - If what happens is information is used to inform multistage summative, it does contribute in an indirect way to the final score; how much interims contribute is a function of how much they agree with the final score; if summative is substantially better, then maybe we can show statistically that interims did not have much value; can turn this into weighting that varies depending on proficiency levels demonstrated on component tests; difficult to explain in laymen terms
 - Maybe not “count” but serve as a start point; teachers should adjust instruction to combat weaknesses
 - DPI: how much information to share out with stakeholders; if we say interims are low stakes, but we are also going to use them to inform multistage adaptive, they will want to understand how, but that is a complex psychometric answer; want everyone to feel it is a fair system
- Communication
 - Trying to communicate out as building the system has been a struggle
 - People are interested and have jumped on board to be in pilot; many liked NC Check-in’s, and this is the next step up

2. UNCG Drift Analysis

- TAC Response
 - Pre-equated models with 2019 item banks may be ok to get scores out from 2021, but what about the out years?
 - New embedded field test items will also appear 0.5 SD more difficult than they will be in 2022 assuming everyone goes back to school; item parameters from pre- calibration will not be right...can not think of how to fix them; figure out a way to make the 2022 forms using items from 2019 and before as guide to construct the forms

- Think about taking some of those 2019 and before items and having content folks look at them and see if you can do some item modelling to deal with potential security concerns. Then we can use starting parameters from 2019 as strong priors; any new item types is asking for a problem with scale stability
 - DPI: from operational side, if we fix 2019 item parameters and try to calibrate field test items onto that scale is that a reasonable way to build a form? Then check post-equating
- Do you have a limitation on being able to do this in a concurrent sense? If I have actual people taking Form M and N, use parameters to score the 2020 people
 - DPI: in 2019, administered same forms with same embedded items; if we bring people in and combine them with sample of 2021
- Fix 2019 parameters and free field test items for 2020; the justification is you have 2019 people in 2021...can set mean prior to -.5 for the 2020 group
- Do not like looking at a and b parameters separately; did you consider looking at expected p-value; look to expected response function instead; robust z
- Generally throwing out anchor items is not great; anchor set purification is not great; did you generate ICC's? May be more than just drift; may be more DIF
- Wald-2 11 anchor items are those that showed the central amount of drift (-0.5)
- The 11 anchor items drifted about -0.5 in difficulty; the 39 candidates are actually drifting more or less than that...did all item change difficulty by same amount? Surprised there is this much variation in how items appear to be more or less difficult, which goes back to holes in instruction; an unevenness...how useful can items field tested under these circumstances be in the future?
- All of the equating research...nonequivalent groups in Fall to Spring under normal circumstances; all the assumption we make even under NEAT designs may be out the window here
- Borrowing from what we know in the Rasch world; adopt multiple flagging criteria for eliminating items; not just most powerful or most sensitive, but use accompanying tests as well
 - DPI: clarification on operational analysis; connects with conversation about reading standard setting...using 2019 parameters
- Try to not to create new operational forms with embedded data from this year
- How many operational from did you have?
 - DPI: only 2, trying to create a third
- Wonder if you could make pseudo new forms by combining items on the two existing forms; does not make more items, but would make them not entirely the same
 - DPI: liked this idea for current situation; maybe grab leftover items in bank if available when Form M and N were created
- Make forms that are mostly out of old items from Form M and N and then use post-equating, if you could buy time to calibrate new items with an early sample
- This becomes a policy decision; move to pre-equating model with a post-equating or early return check; fundamentally asking to trust score tables; a lot is put on fit, particularly person-fit; cannot for census return to publish scores; if hit 50-60% and results are not changing, good enough to get the scores out and then do a final

calibration once all scores are in and bank item parameters; just have a plan in place

- Plan A is go with what you have got; use current forms for this year and possibly next year
- Plan B is the early return
- Post-equate in both cases, do not stay with parameters when they were calibrated as pretest items
- How similar were populations?
 - DPI: most if not all high schools were remote and in terms of demographics it is comparable because at 90% testing rate
- DPI Summary:
 - Plan A use forms this year
 - Plan B go to item bank and make some hybrid forms
 - Post-equate in either case
- TAC Response: mix and match is not Plan B only; we moved to IRT to have an item bank with parameters; now worried less about linking than maintaining bank to keep scale and parameters as stable as possible; also discussed surface level adjustments for AIG; fix or use really strong priors per item family

3. Balanced Assessment System (Innovative Assessment redux)

- Overview
 - Started with proof of concept in 2015 with 5% of students
 - Purpose of interims was to provide immediate and detailed feedback; intent was to keep for formative uses and low stakes
 - 2016, they became official NC Check-in's
 - 2017, expanded to more grades
 - 2020, NC Check-in's for math, reading and science for grades 3-8
- IADA
 - Hope to enhance NC Check-in framework
 - Provide data that will inform end of year multistage summative assessment for any accountability measures
 - New features
 - Longer window, flexibility for all three administrations
 - Upgraded online dynamic reports
 - Add an on-track proficiency indicator on reports for each interim; still thinking of a binary term
 - Some struggle with language...
 - Want to show where student is off-track and intervention is needed
 - Common core and college readiness
 - Other vendors have influenced requests from DPI stakeholders to add this kind of indicator
 - TAC Response:
 - On solving the problem of no schedule: keep track of the data as to when interims were administered to particular kids; at some point you might want to calibrate items onto an IRT scale, and an item might have different parameters depending on when it was administered

- On comments on on-track, add a sentence about what we mean: this is a prediction of where a student will be if things stay as they are; instead, say: a student is likely not to be at level 3, without additional support; downplay this indicator, because teachers should already be able to identify whose on track...perhaps have teachers flag proficiency just prior to administering interims
- Any new assessment the question is always, will this definitively tell whether a student will pass at the end of the day; what happens to the assessment literacy approach when we then give into the request to give additional information?
- How do you know from interim performance that a student is on or off-track? Consider the psychological impact
- Indicate that your child got _ correct, based on prior administrations, students with that score scored in this range at the end of the year

4. Long-term Impact of COVID

- Remote administration
 - Good to have on back burner; worthwhile to have as a capacity anyway
 - “Cheating” and psychometric properties
 - So much of the consideration of whether you can or want to depends on the uses of the scores and the stakes of the tests; Duolingo did not have to do anything except expand capacity, because everything is delivered on the phone—but who cares if you cheat on the Duolingo test considering stakes? A big challenge with remote administration is that it exacerbates some types of group differences, especially with respect to technology
 - Will there be remote instruction for some group of students that is non-trivial (in size)?
 - Nontrivial number of students will continue with remote instruction; other contexts to pilot test remote learning/assessment
 - The better we explain the role of testing, the more remote testing may remain available for students who prefer remote learning
 - Serious talk in late 90’s regarding moving towards computerization due to limitation in the size of item banks; we are a field that tends towards penalizing everyone equally...all these fixed effects we put into the design and assume we can generalize; another way to standardize is to facilitate equally; remote testing as a cautious benefit
 - Scenarios could be less than positive or enjoyable; SBAC: several days during which parents and kids have to do tech checks to make sure software works
 - Divide things up; think of remote testing at the higher grades
 - NC large scale testing preceded any Fed mandate; if mandate goes away, not a necessary consequence that large scale assessments go away
- Trend Reporting
 - DPI: do we keep doing trend reporting per the green book?
 - TAC Response: Review CCSSO report on best practices for developing state reports.
 - Two different concerns:

- Folks in measurement are worried about comparable scores; populations are not comparable
 - Second group is trying to analyze results given things are not strictly comparable
 - DPI: what is NAEP doing to maintain trend?
 - They prefer to ignore the blip; skip meetings
- Accountability
 - How has big “A” accountability really helped learning or closed the equity gap?
 - DPI: small improvement but generally flat since Common Core adoption; in NC, when content standards from Math were aligned to NAEP standards, NC did really well...really goes back to content standards; operationalizing that is very difficult
 - Instruction has to improve; setting the big elephant aside, there’s been a lot of that accrues to mandated testing...take alignment, requiring peer review confirming that your test cover certain content in a balanced way was something a lot of states were not doing
 - What should be our expectation? When can we expect gaps to close? Is there a larger body looking over all this?
 - There is no control group; there is no state not subject to the federal education mandate
 - How are we growing with respect to status and with respect to growth? In what areas can we improve or turn the corner?
 - Control for the fact that in growth system, worst students get worst teachers by changing to a value-added model (TN); superintendents lead on this
 - Increasing parental engagement due to remote testing; engaging the community as well
- Reporting
 - DPI: if we see score drops in Spring, regardless of accountability waiver, do we provide score difference and leave it at that? Do we get into factor analysis?
 - The NAEP answer is to be a statistical reporting agency; you will have to measure a different population than usual; without census data, doing analyses that try to disentangle will be controversial at almost all levels --- academics will argue about how to correct, politicians will argue about whether your conclusions agree with their political views; leave it at: it happened, we leave it to others to determine why
 - DHHs will have good data on who was out and who went back quickest; probably a database about this; PowerSchool had present, present-remote or absent; can operationalize OTL variable
 - We have had conversations about pulling the data from PowerSchool; little bit concerned about that; posted a message to accountability services to be mindful of data because it needs to be correct and might be used in Summer; will people want to move on or ask questions about what happened and why?

Dates for next meetings: Sep 16-17, 2021 and March 17-18, 2022

Exhibit IV-05 NC Enhancement Requests for 2021–22

NCTest Enhancement Requests for 2021-22

In March and April 2020, the Online and Reporting meeting group met several times to go through the list of enhancement requests. The requests were submitted from several sources, including the CCB, public school units, and NCDPI staff. During these meetings, each request was assigned a priority level (i.e., high, medium, low, not needed, on hold). Once all requests were assigned a priority, the list was sent to NCDPI Accountability Services leadership for final recommendations to send to NCSU-TOPS.

The following IADA releve enhancement requests were prioritized by leadership to be implement in the 2021–22 school year:

- The ability to export results to excel from the online reports.
- The help tool popup dialog box needs to be in large font when the test is in large font.
- The courses tab should mirror what is scheduled in the Test Window Scheduler (TWS) and only appear if a TWS is selected for that course. This will lessen the courses shown in NCTest Admin (with all of the NC Interims being available at one time, the list will be long and teachers will be confused about what to select).
- Add average percent correct column for each standard listed in the class item report.
- Add the ability to filter the list of review documents (test forms for review). When all are available, the list is long and it is easy to pick the wrong review form.
- Make the calculator on the iPad moveable.

These enhancements are scheduled to be completed by October 1, 2021, which is the first day of the NC Interim test window.

Exhibit IV-06 IADA June 3, 2021 TOPS-DPI Update Meeting

TOPS–DPI IADA 2021 Update Meeting

June 3, 2021



Design Model

The North Carolina Personalized Assessment Tool system (NC Interims and multistage fixed adaptive summative assessment) is designed for online delivery.

TOPS–DPI IADA 2021 Update Meeting

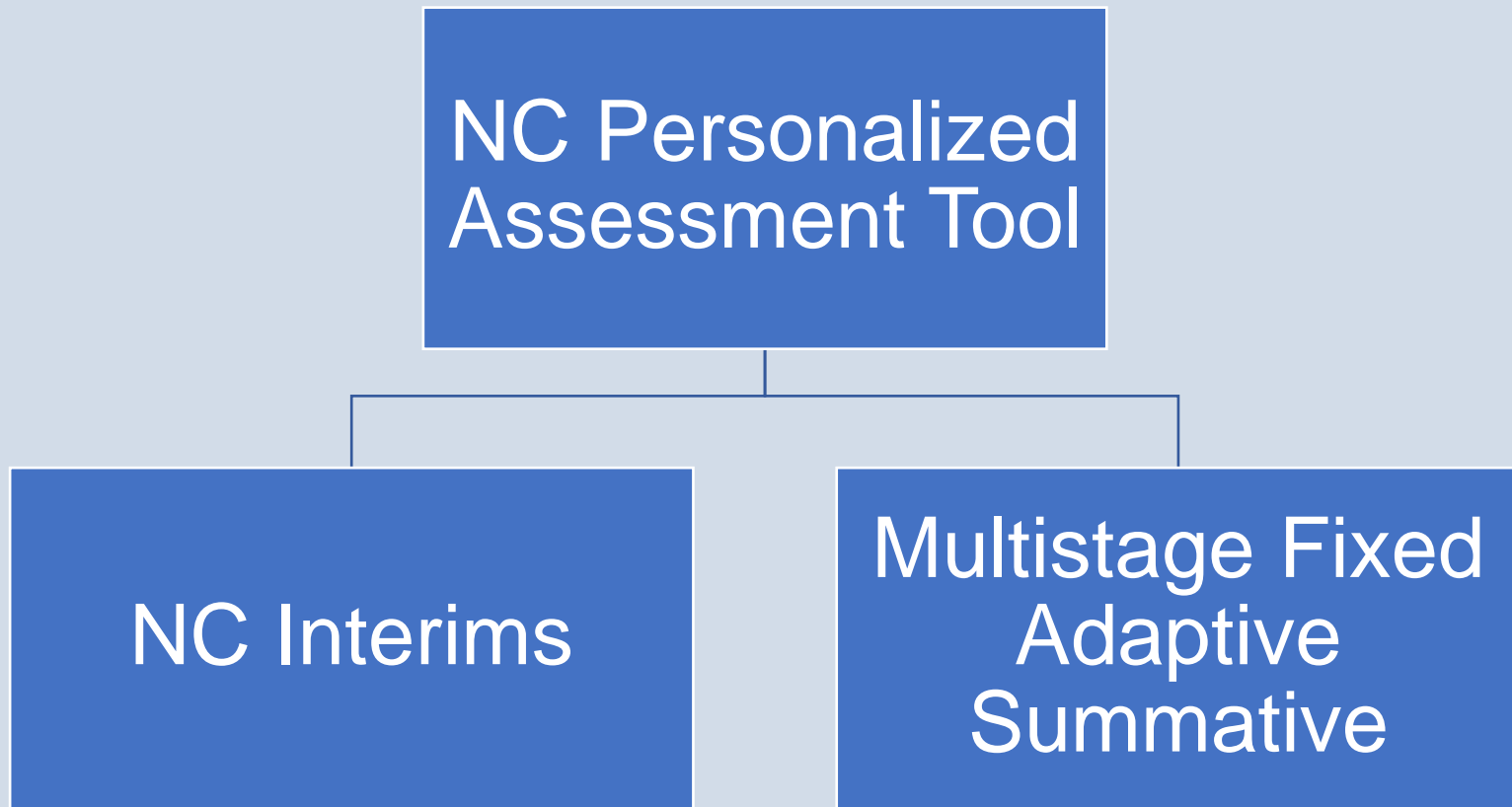
June 3, 2021



Design Model

The North Carolina Personalized Assessment Tool system (NC Interims and multistage fixed adaptive summative assessment) is designed for online delivery.

North Carolina Personalized Assessment Tool



Innovative Assessment Student Experience

- Current Summative
 - All students have the same testing experience.
 - The tests are most reliable around the proficiency cut (Level 3).
- Multistage Fixed Adaptive Summative
 - Students will have a more flexible, yet equitable testing experience.
 - The test is more reliable across the entire scale, without the need to incorporate additional items.

Purpose

- The current design purposes of the North Carolina Personalized Assessment Tool are to:
 - provide educators, students, and stakeholders with immediate and detailed feedback on student performance on grade-level-specific content standards so classroom instruction may be tailored to individual student's needs;
 - provide a progress indicator for each interim on individual student performance in relation to overall grade level performance expectation; and
 - provide a reliable estimate to inform a student's multistage adaptive summative assessment experience that will be used to determine an academic achievement level and for state and federal accountability.

Timeline

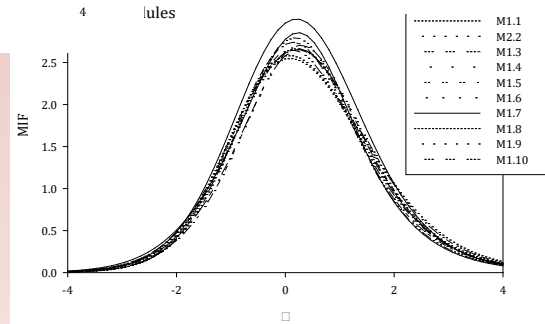
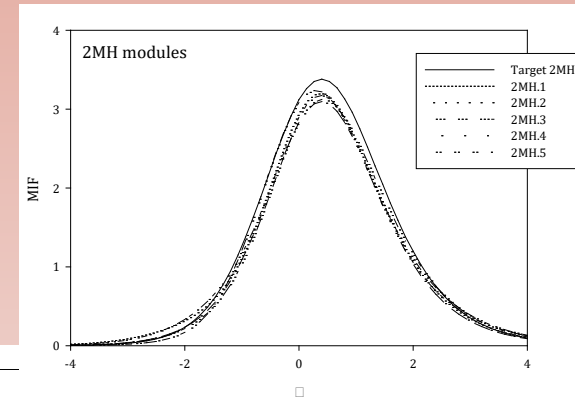
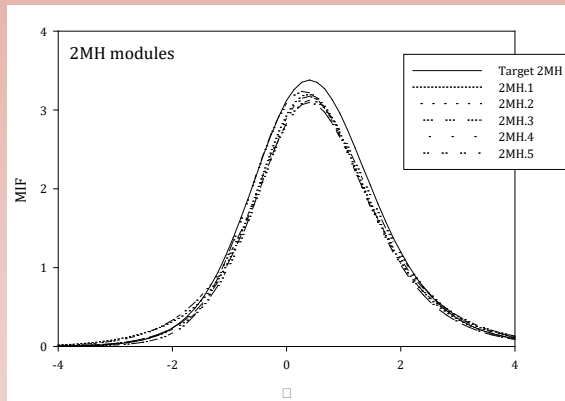
Year	Development Activity
2019–20	Item Development
2020–21	Test Specifications, Item Development, and Professional Development
2021–22	Administer Grades 4 and 7 Mathematics and Reading NC Interims
2022–23	Administer Grades 4, 5, 7, and 8 Mathematics and Reading NC Interims and Multistage Fixed Adaptive Summative
2023–24	Administer Grades 3–8 Mathematics and Reading NC Interims and Multistage Fixed Adaptive Summative Statewide

NC Interims

- The North Carolina Personalized Assessment Tool system will include 3 interim forms that will be developed to target specific grade level content.
- The primary purpose of these interims is to provide teachers and students with formative type feedback during the year.
- The goal from a measurement perspective is to also design each interim so it can provide reliable information to gauge students current standing on grade level expectation.

Multistage Fixed Adaptive Summative Design

Grade Level Performance Scale



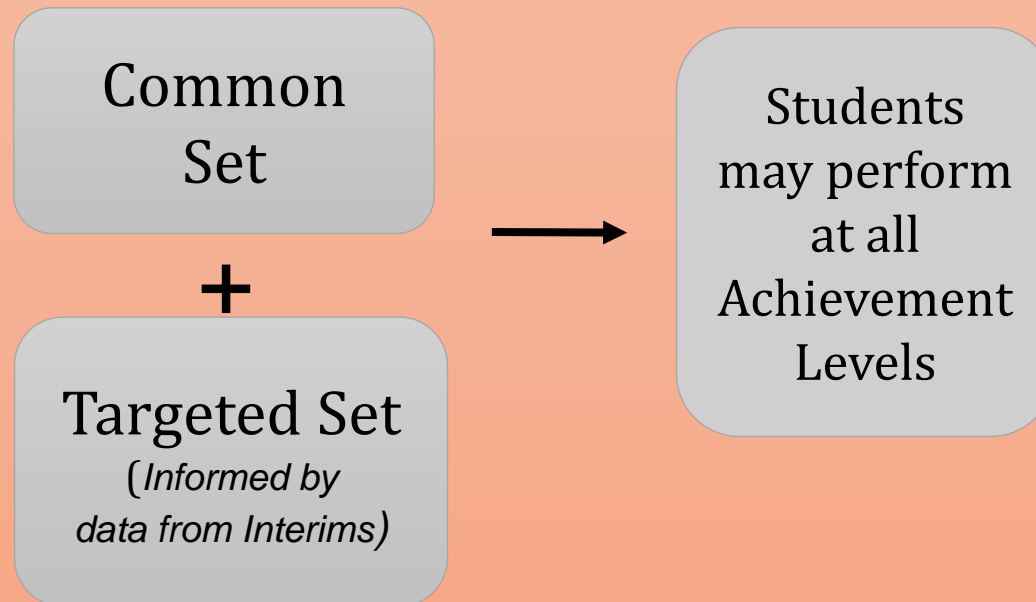
Low

Medium

High

Multistage Fixed Adaptive Summative Design

Multistage Fixed Adaptive Summative Forms



Design

- Student data from North Carolina Personalized Assessment Tool NC Interims will also be used as a reliable indicator to inform the multistage fixed adaptive summative.
- Multistage fixed adaptive summative will require an *equated* score scale.
 - Common items are needed to deal with the non-equivalent groups of students taking different forms with measurement precisions on different areas of the scale.

Assumptions and Constraints

- NC Interims should ideally be non-invasive, *not* count in the overall end-of-year accountability, and at least tangentially formative.
- Multistage fixed adaptive will ideally have two or three levels of difficulty targeted to optimize decision making at prescribed cuts.
- Students will need to complete at least two of the three interims in order for their data to be used to inform the adaptive summative.
- Students with incomplete or no interim data will default to the same multistage fixed adaptive form.
- The routing process will be done ad-hoc then incorporated with the TDS test scheduler.

NC Interim Format



Administration Policies

- **Eligibility:** (2021–22) Pilot school students following the NC *Standard Course of Study* and enrolled in grades 4 and 7 mathematics and reading.
- **Online administration:** *Only* available online. Accommodations available for students who cannot access the online system.
- **Number of NC Interims:** Three reading and three math interims at grades 4 and 7.
- **Interim Administration:**
 - Single or multi-day administration
 - Remote or in-person option
 - No off-grade level administration
 - Order of interim delivery determined by teacher
- **Administration/Review Period:**
 - October 1, 2021–May 31, 2022

Copyright Permissions

- The NC Interims may be administered remotely
 - The Handbook will include guidance that will apply to all passages, regardless of copyright.
 - How should the guidance be framed considering online review sessions?
- For future interim development, non-copyright selections will be included for embedding.
- We will continue to apply for copyrights for tests as a whole.

2021–22 Reading NC Interims

- For the 2021–22 school year, we will have NC Interims for Grades 4 and 7 Reading.
- Format:
 - 24 items
 - Grade 4: multiple-choice
 - Grade 7: multiple-choice and technology-enhanced
 - 3 reading selections, including distinct selection types (Informational, Literature, or Poetry)
 - For each selection, there will be 6 to 9 four-option multiple-choice items or technology-enhanced items.
 - Suggested time of 90 minutes.

2021–22 Mathematics NC Interims

- For the 2021–22 school year, we will have NC Interims for Grades 4 and 7 mathematics.
 - Interim specifications have been developed with feedback from teachers across the state. The groupings of standards on these interims differs from those used on the NC Check-Ins.
- Format
 - 25 items
 - Item types include four-option multiple-choice items, open-ended numeric entry items, and technology-enhanced items.
 - We have partnered with The Friday Institute to see if we can expand technology-enhanced items to Grade 4.
 - Calculator active and inactive sections
 - Suggested time of 90 minutes

Redesigning Individual Student Reports (ISRs)

- NC Interim ISRs will include language that describe skills measured
- The NC Interim ISRs will shift away from percent correct and towards using graphics for reporting
- TOPS Content worked with the TD team to draft parent-friendly language
 - NCDPI-SCI will also review drafted language

Friday Institute Partnership



Professional Development

- **Online Canvas Course:** developed in partnership with The Friday Institute
- **Course Audience:** Teachers, Coaches, Principals/Directors
- **Course Format:** self-paced modules on formative classroom data
- **Course Availability:** Projected Fall 2021

Other Considerations

- Expand to Science Grades 5 and 8 with standards adoption (anticipated June 2022)
 - 2022–23 field testing, 2023–24 administration
- NC Check-Ins and NC Interims
 - 2021–22: NC Interims at grades 4 and 7 and NC Check-Ins will run in parallel (grades 3–8)
 - 2022–23: NC Interims only at grades 4, 5, 7, and 8 and NC Check-Ins at grades 3 and 6
 - 2023–24: NC Interims at grades 3–8

Other Considerations

- Standard Setting
- No interim misadministration form
- Sample questions removed for interims and tutorials are recommended not required

Q & A

Any further questions?

Exhibit IV-07 Mathematics Test Specifications Survey Summary

Grade 7 Mathematics Results of Teacher Input October 2020

There were 21 respondents from the following PSUs.

1. Alpha Academy Charter
2. DC Virgo Preparatory
3. Falls Lake Academy
4. Forsyth Academy
5. Gaston County
6. Granville County
7. Greene County
8. Guilford County
9. Johnston County
10. Montgomery County
11. New Hanover County
12. Rowan Salisbury County
13. Scotland County
14. Sugar Creek Charter
15. Watauga County

Eleven of the 21 identified themselves as classroom teachers, and the remaining 10 respondents were math coaches/district math leaders/math specialists/academic facilitators.

Respondents were asked “On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?” To create the chart below, ratings of 3 and 4 were combined. Ratings of **80%+ are noted in green**; ratings of 60-80% are in orange; and ratings of less than 60% are in red.

Respondents were asked “During which quarter do you COMPLETELY finish teaching this standard?” For many standards, respondents were split between two or more quarters. Data is reflected in parentheses to indicate discrepancies between quarter assignment, so standards will appear in more than one column. The bold, italicized standard represents the majority vote.

Priority	Quarter 1	Quarter 2	Quarter 3	Quarter 4
High (80%+)	7.NS.2 (95%) (5/21) 7.RP.3 (91%) (7/21) 7.RP.2 (90%) (10/21) 7.NS.1 (86%) (5/21)	7.NS.2 (95%) (13/21) 7.EE.4 (95%) (6/21) 7.RP.3 (91%) (6/21) 7.RP.2 (90%) (7/21) 7.NS.1 (86%) (10/21) 7.EE.3 (86%) (5/21) 7.EE.1 (81%) (10/21)	7.EE.4 (95%) (13/21) 7.RP.3 (91%) (6/21) 7.RP.2 (90%) (3/21) 7.EE.3 (86%) (13/21) 7.EE.1 (81%) (9/21)	7.NS.2 (95%) (2/21) 7.EE.4 (95%) (2/21) 7.NS.1 (86%) (5/21) 7.EE.3 (86%) (2/21)
Moderate (60-80%)	7.RP.1 (76%) (15/21) 7.NS.3 (76%) (5/21)	7.G.4 (77%) (2/21) 7.NS.3 (76%) (14/21)	7.G.4 (77%) (12/21) 7.RP.1 (76%) (2/21)	7.G.4 (77%) (7/21) 7.NS.3 (76%) (2/21)

		7.RP.1 (76%) (3/21) 7.EE.2 (62%) (7/21) 7.SP.8 (62%) (9/21)	7.G.5 (72%) (14/21) 7.G.6 (68%) (11/21) 7.EE.2 (62%) (12/21) 7.SP.8 (62%) (2/21)	7.G.5 (72%) (7/21) 7.G.6 (68%) (9/21) 7.SP.8 (62%) (10/21)
Low (<60%)	7.G.1 (53%) (6/21)	7.SP.7 (58%) (9/21) 7.G.1 (53%) (7/21)* 7.SP.5 (33%) (6/21) 7.SP.6 (33%) (6/21)	7.SP.7 (58%) (2/21) 7.G.1 (53%) (7/21)* 7.G.2 (33%) (11/21) 7.SP.5 (33%) (2/21) 7.SP.6 (33%) (2/21)	7.SP.7 (58%) (10/21) 7.SP.4 (57%) (20/21) 7.SP.3 (38%) (20/21) 7.G.2 (33%) (9/21) 7.SP.2 (33%) (20/21) 7.SP.5 (33%) (13/21) 7.SP.6 (33%) (13/21) 7.SP.1 (29%) (20/21)

*denotes even split across more than one quarter

Note: 7.EE.2, 7.NS.1, and 7.NS.2 are all tested through other standards and do not have their own items in the TDS.

TOPS Content (Kevin, Mike G, Darlene, and Rob) and NCDPI-TD (Steph and Beth) met on October 30 to develop a proposal for each of the three interim assessments.

Grade 7 Mathematics IADA Proposal		
Interim #1	Interim #2	Interim #3
7.G.1	7.EE.1	7.EE.4
7.NS.3	7.EE.3	7.G.5
7.RP.1	7.EE.4	7.G.6
7.RP.2	7.NS.3	7.SP.7
7.RP.3	7.RP.3	7.SP.8

Interim #1 addresses the same standards as NC Check-In #1, but Interims #2 and #3 differ from the standards assessed on the existing NC Check-Ins #2 and #3.

Grade 7 Mathematics Results of Teacher Input to Proposed Specifications December 2020

There were 14 respondents from the following PSUs.

1. Greene County Schools
2. DC Virgo Preparatory
3. New Hanover County Schools
4. Cherokee Middle School
5. Rowan Salisbury Schools
6. Granville County Schools
7. Guilford County Schools
8. Spring Hill Middle School
9. United Community Charter School
10. Watauga County Schools
11. Mooresville Middle School
12. Alpha Academy
13. Washington County Schools
14. Montgomery County Schools

Results for Question 1: On a scale of 1 to 4, does this GROUPING OF CONTENT STANDARDS meet your formative data needs, where 1 means “does not meet my formative data needs” and 4 means “perfectly meets my formative data needs.”

- 1 respondent (6%) chose 2
- 8 respondents (57%) chose 3
- 5 respondents (36%) chose 4
- Thus, 93% rated this item as a 3 or 4 on a scale of 1 to 4.

Results for Question 2: Please share any additional feedback on the GROUPING OF CONTENT STANDARDS.

- I wish 7.G.4 had been included as well. It would be helpful to have some formative data on that standard as it applies to 7.G.6.
- What is the rationale for 7.NS.3 and 7.RP.3 tested in Interim #1 and #2?
- Possibly put all of EE.4 in Interim #2 or Interim #3. Is the reasoning for including RP.3 in Interim #2 the consumer math portion? Interim #2 seems standard heavy, with regards to scheduling and it coming shortly after a 2 week holiday break.
- For Interim #2 7.NS.3 before any 7.EE.1.
- Interim #3 is not as strong on meeting our districts formative assessment needs because we did not choose 7.SP.7 or 7.SP.8 as priority standards for 7th grade math instruction. The other two interim assessments, overall, will assess the priority standards we agreed upon as a county.

Although we would be giving assessment #2 first, as it is most closely aligned with our sequencing.

- SP standards correlate nicely with RP.1 and RP.2 - I'd prefer they be linked together.
- Interim #3 groups of G and SP seems to be disconnected.
- I think it should start with NS, then RP (G1 should go with proportions), then EE, then SP, then the rest of G.

TOPS Content (Kevin, Mike G, Darlene, and Rob) and NCDPI-TD (Steph, Iris, and Beth) met on December 18 to review feedback from the follow-up survey. Prior to the meeting, this document was shared. Feedback was considered and discussed. In response to the comments that 7.NS.2, 7.RP.3, and 7.EE.4 are each on two interims, the team confirmed that it is appropriate for these three standards to be on multiple interims as they are critical standards at this grade level. In our initial meeting to develop standards, we allowed teacher input on standards from the first survey to speak loudly. Results of the follow-up survey indicated a 93% approval rate for the proposed specs. Given the restrictions to include three domains and a total of five standards on each interim, we feel strongly that the original proposal represents our best efforts to meet the formative data needs of survey respondents. As a team, we decided not to modify the existing proposal.

Our proposed testing specifications for the Grade 7 Mathematics IADA interim assessments are as follows.

Grade 7 Mathematics IADA Proposal		
Interim #1	Interim #2	Interim #3
7.G.1	7.EE.1	7.EE.4
7.NS.3	7.EE.3	7.G.5
7.RP.1	7.EE.4	7.G.6
7.RP.2	7.NS.3	7.SP.7
7.RP.3	7.RP.3	7.SP.8

Exhibit IV-08 Innovative Assessments—May 2021 Progress Update on The Friday
Institute Efforts and Deliverables

Innovative Assessments - May 2021

Progress Update on Friday Institute Efforts & Deliverables

Summary

This report presents an update on the Friday Institute's (FI) progress on the Innovative Assessments project. The Professional Learning and Leading Collaborative (PLLC) team and the Program Evaluation and Education Research (PEER) group have collaborated with educational stakeholders, including students, teachers, testing coordinators, and district leaders to (1) develop high-quality professional learning modules focused on using student data to drive instruction and (2) ensure that the newly developed North Carolina Personalized Assessment Tool (NCPAT) meets teacher and student needs and expectations.

Key Updates

- The FI continues to work closely with DPI, meeting regularly and checking in for feedback on deliverables.
- Professional learning modules are in development and will be ready for the NCPAT's rollout.
- Interviews with stakeholders and cognitive labs with students and school personnel are complete.

I. Professional Learning Opportunities for Teachers, Coaches, Principals, and District Leaders

- A. Develop a regional, job-embedded professional learning program for teachers, coaches, principals, and district leaders that includes program materials and logistics.
 - PLLC team members have regularly met with DPI to ensure that professional development learning modules accurately reflect DPI's wants and needs.
 - From April – May 2021, the PLLC team has worked to create separate professional development learning modules to meet the needs of different audiences: teachers, coaches, and district leaders.
 - The PLLC team will continue to develop the professional development learning modules and will have regular check-ins with relevant DPI team members.
- B. Disseminate professional learning deliverables, online support materials and communication resources.
 - The process of dissemination of professional learning deliverables will occur following approval of DPI and when the Innovative Assessments are in the pilot phase.

II. Strategies and Tools for Implementing Innovative Assessments

- A. Develop a rollout plan for the professional learning modules for the 2021-2024 school years.
 - Development of the specific rollout plan for professional learning modules will occur following approval of DPI and when the Innovative Assessments are in the pilot phase.
- B. Create outreach materials and other supports as models for schools and teachers to use.
 - Throughout summer 2021, the team will begin developing outreach materials and infographics to support teachers and schools.

- C. Work with DPI to upload content, resources, and materials into Canvas and synthesize in a usable format.
- In collaboration with DPI, the PLLC will assist in uploading FI-developed content and original videos at the time of NCPAT implementation.

III. Support for DPI and Regional System of Supports

- A. Collaborate with Regional Case Managers (RCM's) and their teams to help identify anticipated needs and opportunities for coaching and additional support.
- Currently on hold until piloting efforts begin.
- B. Work in partnership with DPI to review deliverables and ensure they provide the intended support for RCM's leading into the pilot year.
- Currently on hold until piloting efforts begin.

IV. Continuous Improvement Research

- A. Develop in collaboration with the NCDPI and the PLLC team a comprehensive professional development evaluation plan.
- To date, the evaluation efforts have focused on understanding the context and gathering stakeholder input on the conditions in which the NCPAT will be implemented.
 - The PEER group worked in close partnership with NCDPI and the PLLC team to develop and refine stakeholder interview questions pertaining to the NCPAT and professional development needs, as well as cognitive lab protocol, student prompts, and teacher interview questions (see section IV.E. below).
 - Evaluation planning efforts will shift this summer towards developing data collection instruments and protocols to understand and improve the impact of professional learning modules and resources.
- B. Conduct a literature review to inform curriculum development and guide rollout decisions.
- The PEER group conducted a cursory literature review was conducted to guide an appropriate line of questioning for the cognitive labs. This review was used to develop both student prompts and teacher interview questions.
 - The PLLC has also curated literature and source material for the development of the professional learning modules.
 - Literature will continue to be reviewed and curated as needed following analysis of the cognitive lab data collected (see IV.D. below).
- C. Conduct focus groups and interviews with key stakeholders (e.g. administrators, teachers, EPP faculty) to: (1) Identify and prioritize professional learning needs; (2) Guide design and messaging of Innovative Assessments.

- Between January and February 2021, the PEER group conducted 16 interviews and focus groups with pilot school/district stakeholders to understand (1) their perceptions of and needs for the NCPAT and (2) the types of professional development related to the NCPAT that would best support their learning
 - The PEER group shared the qualitative analysis of the interviews with the PLLC team, who used the information as a guide and resource for creating professional development modules about data usage.
 - As the NCPAT is piloted, the PEER group will continue to support DPI in the design and messaging surrounding the Innovative Assessments.
- D. Support NCDPI in conducting cognitive labs to inform the development and refinement of assessment items.
- In May of 2021, PEER group researchers conducted cognitive labs with 12 third through fifth grade students from six school districts around North Carolina and at least one school employee from each district to gauge how students approached and perceived the new test question formats.
 - The PEER group is currently analyzing data from the cognitive labs to share out in a report to DPI in a meeting scheduled for June 8, 2021.
- E. Identify or develop instruments and protocols for data collection.
- In January 2021, the PEER group developed a [focus group protocol](#) to gather stakeholder feedback and worked with NCDPI to finalize the protocol.
 - Drawing upon the research literature on cognitive labs, the PEER group developed a [semi-structured cognitive lab protocol and teacher follow-up interview protocol](#) and solicited feedback from DPI.
 - The PEER group worked collaboratively with NCDPI to develop participant recruitment protocols and

V. Progress Monitoring and Reporting

- On January 26, 2021 the PLLC team received feedback on a conceptual graphic and [redeveloped it](#) based on feedback; the PEER group presented an [initial analysis](#) from its work with district stakeholders.
- In February 2021, the PEER group provided a [one-page handout](#) with analysis from stakeholder interviews.
- On March 1, 2021, the FI assisted DPI in presenting a [webinar](#) to update pilot schools and districts about the status of the Innovative Assessments.
- In March 2021, the PLLC team provided a [one-page handout](#) explaining the vision behind their professional development module series, which focuses on using data to drive instruction.

Exhibit IV-09 Amended Task Order

TASK ORDER NO. _____
 _____ New _____ Modification No. _____

NCDPI CONTRACT NO. PR11836364
Amendment No 2

TASK ORDER

**Issued Under the North Carolina Department of Public Instruction, University of North Carolina
 Master Agreement, Version 002
 Project Personnel**

UNC Institution

Principal Investigator

University: North Carolina State University (NCSU)
 Name, Title: Shaun Kellogg, Ph.D. Director of Research & Evaluation
 Emmy Coleman, Senior Research Scholar and Interim Director of the Professional Learning and Leading Collaborative
 Address: 1890 Main Campus Dr., Campus Box 7249
 City, State, Zip: Raleigh, NC 27695
 Phone, fax: 919-513-8552
 Email: sbkellog@ncsu.edu; elcolem2@ncsu.edu

Contract Administrator

University: NCSU
 Name, Title: Sherrie Settle and other Sponsored Programs Authorized Representatives
 Address: 2601 Wolf Village Way, Suite 240
 City, state, zip: Raleigh, NC 27695
 Phone, fax: 919.515.2444; Email: sps@ncsu.edu

NCDPI

Project Coordinator

N.C. Department of Public Instruction
 Name, Title: Tammy Howard, Director, Accountability Services
 Address: 6307 Mail Service Center
 City, State, Zip: Raleigh, NC 27699-6307
 Phone, fax: P/984-236-2716
 Email: tammy.howard@dpi.nc.gov

Contract Administrator

North Carolina Department of Public Instruction
 Name, Title Mashonda Southerland, Procurement Specialist
 Address: 6336 Mail Service Center
 City, State, Zip: Raleigh, NC 27699-6336
 Phone, fax: P/984-236-2363
 Email: Mashonda.southerland@dpi.nc.gov

Project Description

Project Title: Cognitive Labs, Focus Groups and Professional Development for the Innovative Assessment Pilot.
 Project Contact for University: Shaun Kellogg, Ph.D. and Dr. Emmy Coleman
 Project Start/End Dates: October 1, 2020 – December 31, 2021

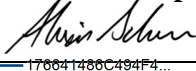
Incorporation

The Terms and Conditions of the NCDPI/UNC Master Agreement, Version 002 are incorporated by reference. This Task Order also includes any Appendices or addendums attached hereto, including Appendix A "Recipient Scope of Work," Appendix B "the Funding Source Award Notice" (if applicable), Appendix C "Contractor Certifications" (if applicable), and Appendix D "Detailed Budget – including allowable Facilities and Administrative Cost recovery."

IN WITNESS THEREOF, the parties have caused the Task Order to be executed by their authorized representatives.

ATTEST:

North Carolina Department of Public Instruction

By: 
 178641486C494F4...
 Alexis Schauss
 Chief Financial Officer

7/27/2021 | 1:23:19 PM EDT

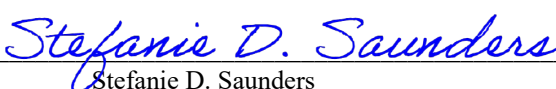
Date

DocuSigned by:
 By: 
 972337BBC384D9...
 Catherine Truitt
 NC Superintendent of Public Instruction

7/28/2021 | 11:50:27 AM EDT

Date

UNC Institution


 Stefanie D. Saunders
 Associate Director, Operations - Sponsored Programs

Stefanie D. Saunders Digitally signed by Stefanie D. Saunders
 Date: 2021.07.26 14:18:38 -04'00'

Date

TASK ORDER NO. _____
 _____ New _____ Modification No. _____

NCDPI CONTRACT NO. PR11836364
Amendment No 2

Total funding this Task Order: \$0
 Total Project Costs: \$281,849
 Total previous funding to date: *
 Cost share required with this action:
 Cost share to date:

*Previous funding via prior Task Orders.

Funding Source: Federal
 Agency #:
 CFDA#:
 Title:

Recipient Fiscal Agent

Name, Title: Justo Torres, Contracts and Grants
 Address: 2601 Wolf Village Way, Admin. Services Bldg. III,
 Box 7214
 City, state, zip: Raleigh, NC 37695-7214
 Phone, fax: 919.515.8008
 Email: cnghelpdesk@ncsu.edu

Special Terms and Conditions

See Appendix C, Contractor Certifications

Invoicing

Cost reimbursement under this Task Order will require periodic invoices submitted no more frequently than monthly and a final invoice submitted within 30 days of the project end date listed on page 1. All invoices are subject to the approval of the "NCDPI Project Coordinator." Invoices are to be *addressed* to NCDPI, Accounts Payable, 6331 Mail Services Center, Raleigh, NC 27699-6331, but *mailed* to the Project Coordinator listed on page 1 of this Task Order.

Amendment Description

Describe the reason for amending this Task Order:

The Principal Investigator and the University are requesting to change the Co-PI due to the following justification:

Dr. Rexrode has left the University. Change Co-PI from Dr. Shayla Rexrode to Dr. Emmy Coleman.
 Emmy Coleman, Senior Research Scholar and Interim Director of the Professional Learning and Leading Collaborative, will assume leadership responsibilities for the professional development work associated with grant activities

No other changes were made to this task order.

Amendment #2 – Request for no cost extension to extend task order through 12-31-2021 and budget revision. Due to COVID-19 the been completed. Email address was added for Emmy Coleman under Principal Investigator.

Budget Code: 0801-532150-160037950315
Budget Source: Federal
Strategic Priority:

TASK ORDER NO. _____
 _____ New _____ Modification No. _____

NCDPI CONTRACT NO. **PR11836364**
Amendment No 2

APPENDIX A –Scope of Work

The Friday Institute for Educational Innovation at NC State University

Proposed Scope of Work

October 1, 2020 - December 31, 2021

Background

Through the U.S Department of Education’s Innovative Assessment Demonstration Authority, the North Carolina Department of Public Instruction is developing a system of through-course assessment opportunities aimed towards a balanced assessment system that will provide granular data for immediate feedback about students’ performance throughout the year.

Purpose and Goals

The purpose of the proposed development and evaluation work conducted by the Friday Institute will be to support the Innovative Assessment system through the provision of professional learning for educators and conduct applied research to support continuous improvement. The professional learning and continuous improvement approach will be implemented with the pilot schools and districts and then with the broader group of districts and schools.

Goals for the project include:

1. **Professional Development.** To develop a blended professional development program that will support teachers, coaches, principals and district leaders in implementing the Innovative Assessments, including why the assessments are important for instruction and student learning and how to use data in a systematic way to inform teaching and learning. This will include developing capacity in coaches and district leaders in supporting teachers, including strategies for implementation.
2. **Strategies and Tools.** To work in partnership with DPI to create a multi-year implementation plan for delivering and supporting the professional learning and communication resources to support outreach to stakeholders.
3. **Regional Supports.** To share and review deliverables with the DPI Regional Case Managers to identify possible gaps or anticipated needs prior to the implementation with the pilot cohorts.
4. **Program Evaluation.** To develop a comprehensive evaluation plan to support the continuous improvement of professional development efforts and gather stakeholder feedback and data that will be used to guide development of the assessment system, professional development program, and other aspects of the project.
5. **Reporting & Dissemination.** To deliver timely, valid, actionable feedback to guide innovative assessment and professional development efforts and to inform internal and external stakeholders of the program’s progress, anticipated challenges, and opportunities.

TASK ORDER NO. _____
 _____ New _____ Modification No. _____

NCDPI CONTRACT NO. **PR11836364**
Amendment No 2

Dr. Shaun Kellogg (PI) and Shayla Rexrode (Co-PI) will lead and guide overall strategic vision and engagement with high-level stakeholder groups, lead and manage the day-to-day operations and project budget on behalf of the Friday Institute, and will be responsible for the following scope of deliverables:

Focus Area	Scope of Deliverables
1. Professional Learning Opportunities for Teachers, Coaches, Principals, and District Leaders	<p>A. Develop a regional, job-embedded professional learning program for teachers, coaches, principals, and district leaders that includes program materials and logistics. During the 2020-21 year The FI team will...</p> <ul style="list-style-type: none"> ○ Attend regular meetings to ensure alignment of materials and program goals. ○ Develop materials that support job-embedded approaches for teachers that utilizes a continuous improvement cycle to support the learning and implementation of the Innovative Assessments. ○ Develop materials specific for coaches, principals, and district leaders (within the cohorts) to build capacity and plan how to lead the initiative and provide support to teachers, including guiding teachers to understand why this is important and developing strategies for implementation. ○ Design materials for teachers to build capacity and plan how to coach other teachers in their implementation. <p>B. Disseminate professional learning deliverables, online support materials and communication resources.</p> <p><i>Deliverables may adjust based upon the data and input from DPI using the continuous improvement approach.</i></p>
2. Strategies and Tools for Implementing the Innovative Assessments	<p>A. Develop the specific rollout plan for the professional learning modules during the 2021-2024 school years.</p> <p>B. Create specific outreach materials and other supports as models for schools and teachers to use.</p> <p>C. Work with DPI to upload content, resources, and materials into Canvas and synthesize in a usable format.</p>
3. Support for DPI and Regional System of Supports	<p>A. Collaborate with Regional Case Managers (RCM's) and their teams to help identify anticipated needs and opportunities for coaching and additional support.</p> <p>B. Work in partnership with DPI to review deliverables and ensure they provide the intended support for RCM's leading into the pilot year.</p>

TASK ORDER NO. _____
New _____ Modification No. _____NCDPI CONTRACT NO. **PR11836364**
Amendment No 2

4. Continuous Improvement Research	<ul style="list-style-type: none"> A. Develop in collaboration with the NCDPI and the PLLC team a comprehensive professional development evaluation plan B. Conduct a literature review to inform C. Conduct focus groups and interviews with key stakeholders (e.g. administrators, teachers, EPP faculty) to: <ul style="list-style-type: none"> a. Identify and prioritize professional learning needs; b. Guide design and Messaging of Innovative Assessments D. Support NCDPI in conducting cognitive labs to inform the development and refinement of assessment items E. Identify or develop instruments and protocols for data collection such as: <ul style="list-style-type: none"> a. Pre-Post Participant Self-Assessments b. Program Monitoring Checklists c. Stakeholder Feedback Surveys d. Interview/Focus Group Questions & Protocols
5. Reports on Progress, Challenges, and Opportunities	<ul style="list-style-type: none"> A. Provide ongoing formative reporting (e.g. memos, oral reports, presentations) of evaluation findings to support continuous improvement efforts B. Develop an annual summative report for external audiences (NCDPI Departments, SBE, IADA, etc.) C. Support dissemination of findings through short information briefs and presentations

Project Timeline and Key Activities

Product	Key Activities	2020-2021			
		Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep
1. Professional Learning Opportunities	A. Program Development				
	B. Program Dissemination				
2. Strategies and Tools for Innovative Assessment	A. Implementation Plan				
	B. Outreach Materials				
	C. Synthesize in Useable Format				
3. Support for DPI Regional System of Supports	A. Collaborate with RCM's				
	B. Review materials with DPI				
4. Evaluation & Continuous Improvement Efforts	A. Evaluation Planning				
	B. Literature Review				
	C. Stakeholder Focus Groups				
	D. Cognitive Labs				
	E. Instrument Development				
5. Progress Monitoring &	A. Internal Evaluation Briefs				

TASK ORDER NO. _____
New _____ Modification No. _____

NCDPI CONTRACT NO. **PR11836364**
Amendment No 2

Reporting	B. Annual Summative Report				
	C. Dissemination of Findings				

TASK ORDER NO. _____
 _____ New _____ Modification No. _____

NCDPI CONTRACT NO. PR11836364
Amendment No 2

Appendix C -- Special Terms and Conditions

Conflicts of Interest

North Carolina General Statutes 143-58.1 and 143-1352 prohibit the unauthorized use of public purchase(s) or contract procedures for private benefit. NCSU certifies that all its employees and any approved third parties or subcontractors of NCSU performing work under this Task Order are subject to a conflict of interest policy. NCSU will, upon reasonable request from NCDPI, verify and produce true copies of any such policy.

If the work performed under this Task Order involves the creation, research, investigation, or generation of a future request for proposals (RFP), invitation for bids (IFB), or request for quotes (RFQ); NCSU shall:

- a) Prohibit NCSU employees and any approved third parties or subcontractors of NCSU performing work under this Task Order from bidding on the subsequent RFP, IFB, or RFQ and from serving as a subcontractor to an awarded vendor; and
- b) Require NCSU employees and any approved third parties or subcontractors of NCSU performing work under this Task Order to certify that she/he does not have any other potential conflicts of interest that could influence, or be reasonably perceived as influencing, the creation, research, investigation, generation, or evaluation of the RFP, IFB, or RFQ or solicitation.

In addition to the immediately foregoing requirements, if the work performed under this Task Order involves the evaluation of a future RFP, IFB, or RFQ; NCSU shall:

- a) Require NCSU employees and any approved third parties or subcontractors of NCSU performing work under this Task Order involving the evaluation of vendor responses to a RFP, IFB, or RFQ to be able to certify that she/he does not have, or expect to gain, any personal, financial, business, or other benefit, from a potential contract awarded to any of the competing vendors bidding on the RFP, IFB, or RFQ. If said employees or approved third parties or subcontractors are not able to make said certification, they must recuse themselves and notify NCDPI.

Confidentiality

In the event that the work performed under this Task Order involves the creation, research, investigation, generation, or evaluation of a future Request for Proposals or other solicitation, NCSU certifies that all its employees performing work on a request for proposals (RFP), invitation for bids (IFB), or request for quotes (RFQ) are subject to the confidentiality provisions described herein. NCSU agrees and specifically certifies that it, its officers, directors, principals and employees, shall hold all information marked by NCDPI as confidential at the time of disclosure in the strictest confidence, or, if disclosed orally, must be identified as confidential at the time of disclosure and confirmed in writing and marked as confidential within thirty (30) days of such disclosure, and shall not disclose the same to any third party without the express written approval of the NCDPI. For a period of three (3) years following the date of such disclosure, the receiving party agrees to use the confidential information only for purposes of this *Task Order/Agreement* and further agree that it will not disclose or publish such information except that these restrictions do not apply to:

- (i) information that is or becomes publicly known through no fault of the receiving party;
- (ii) information learned from a third party entitled to disclose it;
- (iii) information already known to or developed by receiving party before receipt from disclosing party, as shown by receiving party's prior written records;
- (iv) information for which receiving party obtains the disclosing party's prior written permission to publish;
- (v) information required to be disclosed by court order or operation of law, including, but not limited to, the North Carolina Public Records Law; or
- (vi) information that is independently developed by the receiving party's personnel who are not privy to the disclosing party's confidential information.

NCSU shall require the same of any approved third party or subcontractor prior to said parties beginning work hereunder.

TASK ORDER NO. _____
 _____ New _____ Modification No. _____

NCDPI CONTRACT NO. PR11836364
 Amendment No 2

APPENDIX D--BUDGET

Year 1 Budget By Task	Subtotal	Overhead	Total by Task
1. Professional Learning	\$141,062	\$21,159	\$162,221
2. Strategies and Tools	\$20,685	\$3,103	\$23,788
3. Support for DPI and Regional System of Supports	\$20,685	\$3,103	\$23,788
4. Continuous Improvement & Evaluation	\$49,508	\$7,426	\$56,934
5. Reporting	\$13,147	\$1,972	\$15,119
Subtotal Year 1 All Tasks	\$245,086	\$36,763	\$281,849

Category	Current Approved Budget	Requested Change	Revised Budget
Salaries	\$ 161,454.00	\$ 15,849.00	\$ 177,303.00
Fringe Benefits	59,283.00	4,871.00	64,154.00
Contracted Services	3,000.00	-	3,000.00
Supplies and Materials	4,000.00	(4,000.00)	-
Domestic Travel	15,100.00	(15,100.00)	-
Foreign Travel	-	-	-
Current Services	2,250.00	(1,620.00)	630.00
Fixed Charges	-	-	-
Capital Outlays	-	-	-
Graduate Tuition	-	-	-
Subcontracts	-	-	-
Other Direct Charges	-	-	-
Total Direct Costs	\$ 245,087.00	\$	\$ 245,087.00
Indirect Costs	36,762.00		36,762.00
Total Costs	\$ 281,849.00	\$ -	\$ 281,849.00

Exhibit IV-10 NCSBE October 2020 Meeting New Business: NCPAT Update



Public Schools of North Carolina

North Carolina Personalized Assessment Tool (NCPAT) Update

October 7, 2020

Tammy Howard, Ph.D.
Director, Accountability Services

Innovative Assessment

- In June 2019, the U.S. Department of Education gave an Innovative Assessment Demonstration Authority (IADA) to North Carolina
- North Carolina's IADA solution is the Personalized Assessment Tool (NCPAT), an assessment system comprised of three interim assessments that lead to a staged adaptive test at the end of the school year

NCPAT

- Three interims (similar to NC Check-Ins)
 - Assess students throughout the school year
 - Provide feedback to teachers
- End of year test: staged adaptive
 - Items are appropriate for students' various achievement levels but do not limit students' ability to demonstrate proficiency

NCPAT Design

- Online primary delivery; paper and pencil available only for students who cannot access online
- Reading and mathematics
 - Spiraled content v. sequential content
- Item types
 - Multiple choice and technology enhanced
 - Possibly performance tasks

Collaboration, Input, and Professional Development

- Testing and Growth Advisory: superintendents, charter school leaders, testing/accountability leaders, and chief academic officers
- CCB: testing and accountability leaders
- Friday Institute: task order to support creation of professional development and cognitive labs for item development

NCPAT Timeline

Grade Level	2019–20	2020–21*	2021–22	2022–23	2023–24
3					Statewide
4		Delayed	Pilot	Pilot	Statewide
5				Pilot	Statewide
6				Pilot	Statewide
7		Delayed	Pilot	Pilot	Statewide
8					Statewide

The 2020–21 pilot administrations for grade 4 mathematics and grade 7 reading were delayed due to no statewide assessments in the 2019–20 school year. The necessary items to build the 2019–20 pilot assessments would have been embedded in the spring 2020 tests.

Voluntary Participants

- Initial application to USED had two districts and one charter school committed to participation
- Currently, 180 schools across 14 districts and 8 charter schools
 - Also Cherokee Central School
- Share information with non-participating districts and encourage their input

Questions



Exhibit IV-11 NCSBE October 2020 Meeting Minutes

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**State Board of Education
Minutes
October 6, 2020**

State Board of Education Vision: Every public school student in North Carolina will be empowered to accept academic challenges, prepared to pursue their chosen path after graduating high school, and encouraged to become lifelong learners with the capacity to engage in a globally-collaborative society.

State Board of Education Mission: The mission of the North Carolina State Board of Education is to use its constitutional authority to guard and maintain the right of a sound, basic education for every child in North Carolina Public Schools.

Attendees/Voting Members:

Eric Davis, Chairman At Large
 Alan Duncan, Vice Chairman
 Amy White, North Central Region
 Reginald Kenan, Southeast Education Region
 Dr. Olivia Oxendine, Sandhills Education Region
 J. Wendell Hall, Member At Large
 Dr. Donna Tipton-Rogers, Western Education Region
 James Ford, Southwest Education Region
 Jill Camnitz, Northeast Education Region

Attendees/Non-Voting:

Mark Johnson, State Superintendent of Public Instruction, Chief Administrative Officer, and Secretary to the Board
 Anthony Jackson, 2020 Superintendent Advisor of the Year
 Maureen Stover, 2020 Burroughs Welcome Fund NC Teacher of the Year Advisor
 Mariah Morris, 2019 Burroughs Welcome Fund NC Teacher of the Year Advisor
 Kisha Clemons, 2020 NC Wells Fargo Principal of The Year Advisor
 Matthew Bristow-Smith, 2019 NC Wells Fargo Principal of The Year Advisor
 Nate Kolk-Tomberlin, High School Senior Advisor
 Bryce Womble, High School Junior Advisor

I. 11:15 AM -- 2020 Fall Planning and Work Session of the North Carolina State Board of Education

A. Call to Order

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1. Eric C. Davis – Chair

- Chairman Davis called the State Board of Education (SBE) meeting to order. He welcomed all Board Members, advisors, staff, online listeners, and Twitter followers to the October 6, 2020, Fall, Planning Work Session of the North Carolina State Board of Education.
- Chairman Davis expressed condolences to Ms. Julie Davis’s family, a third grade teacher from Pinehurst, NC who passed away shortly after complications resulting from contracting COVID-19. Saddened by the loss of Ms. Davis, he shared the uncomfortable reality the virus continues to have around the country and the effect it has on school safety. Data showed NC schools and communities to be safe when practicing the 3 W’s wearing masks, washing hands, and socially distancing.
- Chairman Davis reminded the Board Members that the work session agenda for October 6-8, 2020 has been available for over a week, and they all had time to review the materials. He then asked of any request for changes to the agenda. There were none so he asked Dr. Townsend-Smith to call roll for approval of the agenda.

Motion made by: Amy White

Motion seconded by: Alan Duncan

Voting:

Olivia Oxendine -Yes

Jill Camnitz – Yes

Reginald Kenan – Yes

J Wendell Hall – Yes

Donna Tipton-Rogers – Yes

Amy White - Yes

James Ford – Yes

Vice Chairman Alan Duncan - Yes

Chairman Eric Davis - Yes

II. PLANNING AND WORK SESSION AGENDA

A. 11:20 AM -- Welcome Address

1. James E. Ford - Strategic Planning Committee Chair

- Chairman Davis called on Mr. James Ford and Ms. Jill Camnitz to deliver the welcome address for the 2020 Planning and Work Session.
- Mr. James Ford shared that the agenda is designed to familiarize historical lessons from NC’s educational system retracing past experiences regenerated in order to prepare for the future of making necessary improvements.
- Mr. Ford highlighted educators and students who would provide their perspective opinions along with historical context and their experiences in education.
- Mr. Ford expressed condolences to the family and friends of a well-spoken of teacher, Ms. Davis.

2. Jill Camnitz - Strategic Planning Committee, Vice Chair

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- Ms. Jill Camnitz welcomed all to the SBE 2020 Planning and Work Session. Ms. Camnitz stated that the last two years of meetings have served as a guide in developing strategy for the Equity Resolution. Beginning with translating policy presented by Dr. McMillan of Winston-Salem, Forsyth County Schools who will describe the next steps to the Leandro Action Plan. She additionally told about the Strategic Planning Committees plans for the Wednesday, October 7, 2020 meeting.
- Ms. Camnitz pointed out that the agenda bridges gaps from the past and present which will guide the committee forward. With a path forward that has been carefully constructed with an emphasis on action.
- Starting with the past, Mr. Ford took pleasure of informing that Dr. Ann McColl, with the Innovation Project will present a slideshow that details events that took place from years 1868-1955, prior to desegregation of schools in NC. The slideshow will steer all listeners into past events outlined in keeping schools segregated. These events are foretold using actual newspaper articles, posted flyers and conversations re-enacted that took place and are archived. These struggles set the stage for North Carolinians that follow discussion to strategically plan for each and every child to receive an equitable education.
- Discussion will take place between 7 student and district leaders whose focus shared their own experiences with equity and the whole child prior to and after the COVID-19 pandemic. Illustrations pertaining to the certified teacher workforce and culturally aware teacher workforce, data that is entrusted to inform of policy which will be helpful in establishing school-based Mental Health needs for students and staff, as well as a review of the results of the most recent Youth Behavior Survey, revising the Healthy Living Requirements, implementing district statewide sampling for the Youth Risk Behavior Survey and strengthening of Human Resources (HR) processes and procedures in hiring mental health professionals that are actively available to assume Regional Health Officer Support positions. Ultimately, the goal is to later adopt the school-based mental health policy.

B. 11:25 AM -- STRATEGIC PLANNING COMMITTEE REPORT (Mr. James Ford, Chair and Ms. Jill Camnitz, Vice Chair)

1. OPENING KEYNOTE - Partnerships in Action: Historical Truth Telling - Recognizing our Past and Intentional Steps Forward

a. Dr. Ann McColl

- Dr. McColl with the Innovation Project shared some NC historical facts that started in year 1868 and lasted through 1956 surrounding segregation and the fight for desegregation within the Public school sector which presented from a documentary called "The coalition for justice in a multi-racial democracy," as well as the positioning of Mr. James Walker Hood.
- Mr. Ford declared the historical presentation content as well as context to be captivating and thoroughly informative. He then opened the floor for questions.
- Mr. Matthew Bristow-Smith acknowledged that documents, words and writings surrounding North Carolinians was done to capture the deep roots of historical injustice and inequity of North Carolina's governance and education. He asked Dr. McColl if it had also captured the tension and trajectory to gain a balance between the multicultural residents of the State being that there is again a pivotal journey statewide towards equity. Additionally, he wondered if there were foreseeable years from now in which there may be new generations measuring the work of today with the same level of historical gravity that the presentation brought today looking back at that particular moment in history that we are currently in, working on the State Board of Education Equity Resolution Framework for Action strategic plan to eliminate opportunity gaps.
- Dr. McColl responded that there is a choice to think of this timing as a reconstruction for year 2020 moving forward. Being that there is so much disruption to the education system brought about by COVID-19 and the murder of George

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Floyd which brought about a deeper awareness for every one of those racial injustice moments. She surmised that the times are extraordinary but shared with confidence that historians will look back to year 2020 to see how people chose to act and position themselves such as the State Board has, positioned with great strength on issues of equity and learner-centered issues.

- Mr. Wendell Hall thanked Dr. McColl for the presentation. Dr. Olivia Oxendine speculated on what the story pertaining to inequity would be like in 20 years. Dr. McColl spoke on a couple aspects from 1901 whereas the story told of really forceful legal and illegal situations where force was applied to continue measures of inequity. Dr. McColl stated that levels of intention will be needed to observe the work being done at a programmatic level rather than checking on the issues surrounding systems and structures that persist such as social and economic depression, social-cultural legal economics.
- Mr. Reginald Kenan realized the intention and understanding put into the choice of historical facts presented. He agreed that now is the time for each and every citizen to decide whether they would want to re-live those past experiences where not much progress was made, and bi-racial communication and relationships were forbidden. Mr. Kenan processed that all people should understand one another and realize the need of continued steps to organize respectable partnerships regardless of race, wealth, or social status.

2. ISSUES SESSION - District Perspectives: Addressing Equity & Whole Child Pre and Post COVID – 19 Charting our Path Forward

a. Panel Discussion

- Dr. Deanna Townsend-Smith moderated the panel discussion between students and education leaders sharing their own experiences relating to equity and the whole child which ensures that each student is healthy, safe, engaged, supported, and challenged to set the standard for comprehensive and sustainable school improvement providing long-term student success prior to and after the COVID-19 pandemic. Dr. Townsend-Smith acknowledged that a diverse inclusive of students and educators would be a start to forming thriving young people and purpose filled communities.
- Panelist were Mr. LaShawn Jenkins, Assistant Principal at Tarboro High School in Edgecombe County, Mr. Elijah Sellers, High School Junior at the North Carolina School of Science and Math, Mr. Khanna Gunther, High School Senior from Tarboro High school well as Ms. Kadesh Stewart, Teacher at Princeton Street Elementary, Mr. Edward Ortega, Support Personnel at LB Yancey And Ms. Kim Mesa, ESL Title 3 and Migrant Director. Each participant introduced themselves by sharing their role in the educational community, ideas/supports used in schools today reflect who they are and the reason why it is important for all students to be able to self-identify themselves in learning materials. Several Board Members shared their opinions.
- Dr. Townsend-Smith recollected the panel discussion highlighting takeaways such as the importance of student perspective, removing barriers, using data to inform instruction and the need to recruit more teachers of color.
- Dr. Olivia Oxendine requested to add conversation to the SBE agenda surrounding Math 1 standards because this has been a concern.
- Dr. Donna Tipton-Rogers stated that we need for educators to be open-minded to the pleas from students requesting interesting lesson topics so that their attention is peaked, and greatness achieved. She acknowledges that this appeal from students should be at the top of educators list of concerns.
- Dr. Anthony Jackson thanked the group of panelists for their authentic truthful answers, especially, the students for courageously participating and to those presenting specifically from Vance County.
- Mr. Matthew Bristow-Smith followed up sharing that focus must be kept towards achieving the attainment goals set by myFutureNC (MFNC) of employing at a minimum, 2 million certified instructors, well as, meeting students desire implementing updated data-driven lessons resulting in skill growth and curricula retainment. Mr. Bristow-Smith presented a challenge to all leaders that would align the necessary also individualized resources without hesitation nor bias, be provided to each and every

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student in the State of NC.

D. 2:35 PM - HEALTHY RESPONSIBLE STUDENTS COMMITTEE REPORT (Mr. Reginald Kenan, Chair and Mr. Alan Duncan, Vice Chair)

1. ISSUES SESSION - Using Data to Inform Policy (Youth Risk Behavior Survey) & Establishing Policy to Focus on School-Based Mental Health Needs

a. Whole Child: Using Data to Improve Student Health and Well-Being

- Mr. Reginald Kenan led the Healthy Active Children Progress Report.
- Dr. Ellen Essick, Section Chief for Specialized Instructional Support and NC Healthy Schools verbalized that the Youth Risk Behavior Survey was conducted by 116 Local Education Agency (LEAs) for 3,056 schools. The survey has been administered during the odd years of the school calendar in NC since 1993. Dr. Essick shared that all participants are randomly selected, voluntary by grade level, required to have parental consent and anonymously designed to be completed in one class period.
- Dr. Essick mentioned that the leading causes of most unhealthy behaviors reported were contributed to mortality and morbidity. Collected data established that unintentional injuries and violence such as sexual behaviors, alcohol and other drug use, tobacco use, unhealthy dietary behaviors, inadequate physical activity causing obesity in older students, stress that causes suicide and other documented health issues described such as Priority Health-Risk Behaviors and Health Outcomes. Both of these issues are monitored by the team centered around the survey.
- Dr. Essick provided feedback data that grouped the high school students using percentage pie-charts, defined by gender, race and demographics well as the type of compulsions or pressures students face. These charts are also utilized within school districts and contributing partnerships that monitor school safety, the importance of a healthy breakfast and lunch, importance of daily physical fitness, suicide, sexual counter partnership and bullying. She gave a list of contributing partners which is shared within the supported presentation materials.
- Mr. Les Spell, Data and Policy Consultant for Specialized Instructional Support and NC Healthy Schools gave an account to the information collected and released by the University of Toledo. Studies show that black adolescents 10-18 years of age suicide attempts have been at an all-time high which traditionally report from white students. Dr. Essick and Mr. Spell listed a series of questions that all relate to the reported data such as if the data were true, whether high school students feel that teachers care about their well-being.
- Focused efforts are used surrounding the utilizing the goals attached to the Whole School, Whole Community Whole Child Framework established on November 3, 2016, in conjunction with the September 2020, SBE Resolution centered around supporting equity and excellence in education. Additionally, she reminded that the Leandro WestEd Report guidelines relate to health and equity issues for students. Dr. Essick shared hopes of the discussion presenting recommendations from Board Members that would address some of the health issues that continue to resonate in the lifestyle of young students that will give suggestion of how to implement an informative based solution which will be constructed from data collected from the YRBS. Furthermore, there were additional questions added to the YRBS for year 2021 that will able the SBE to have student feedback of school experiences, advocate for hiring more mental health support personnel that will provide coordinate services for students while expanding to offer the Healthy Active Children Policy with High schoolers.
- Mr. Wendell Hall shared concerns that kids are not feeling safe at school as they once had. He acknowledged that resources such as social and emotional support is given to students, but wonders will there be a need of staff if funded is granted. He wondered if there was data that mentioned why students are fearing going to school.
- Dr. Essick shared that the data has not resonated as of yet on personnel referrals. Mr. James Ford expressed concern with the data reported of students feeling unsafe at school. He was reminded of the high school student panelists that brought awareness to the fact of different students having individualized needs, wondering if it possible for the team to test the students' hypotheses by adding the

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question to the survey. Dr. Essick felt this to be a reasonable request.

- Ms. Jill Camnitz wondered if it is a financial barrier that is keeping the survey at bay and if every public school have a LMNCO. Dr. Essick outlined the increased financial support that would be required statewide to cover the additional administrative duties such as online service and data management required for surveys implementation.
- Mr. Matthew Bristow-Smith believed that the Youth Risk Behavior Survey (YRBS) implemented through NC Healthy Schools would be more effectively used if school administrators had the option to view data broken down by their individual county. He then wondered if it is possible of a natural integration, an act or instance of integrating several assisting programs to students from within one school. Dr. Essick clarified that data broken-down by county is included in the statewide model. She then addressed the lack of funding surrounding integrating services within schools seems to be a challenge.
- Vice Chair Duncan spoke on the disproportion of students versus mental health personnel and social workers noting that the need for the professional service is five times greater than those currently available at schools now as well as funding to hire needed clinicians. Vice Chair Duncan would like for SBE to prioritize students' statewide receiving the assistance they need from professional clinicians on a needed and timely basis. Chairman Davis agreed.
- Dr. Essick shared that the Title V funding that has provided services so far are close to being used without further application to renew those funds. Vice Chair questioned the reasoning behind rejecting grant funds and the dollar amount of the Title V funding. Dr. Essick referred to management as the executive decision maker who decided not to reapply for the funding of approximately 2 million dollars.
- Superintendent Johnson sought clarity - mentioning the Title V funding being used toward the whole child initiatives and stated that the funds were specifically for Sexual Risk Avoidance or for the hiring of mental health professionals. Vice Chair Duncan confirmed those are the funds in question, which is his concern. Superintendent Johnson gave his support of the SBE conducting a policy review, stating that many decisions are not generally elevated to level of approval by the SBE.
- Superintendent Johnson shared that the funding is still available to support NC outside of DPI but not available to pay for the hiring of mental health advisors. Vice Chair Duncan questioned the number of years the funds had been received by DPI, and whether they had been received for an additional two years or more after this revelation of the funding not continuing. Superintendent Johnson was not sure of the number of years this funding had been received. Superintendent Johnson recognized that it was his plan to always stop receiving these funds from a DPI perspective.
- Dr. David Stegall asked Dr. Essick if she was aware of the number of years that funds were received. She stated that it was between ten to fifteen years. Vice Chair Duncan wondered if the additional years of receiving funding in fact was to support the Sexual Risk Avoidance Program wondering why the SBE had not been consulted on any of the decisions.
- Superintendent Johnson stated the SBE could change policy as many items happen at the agency without SBE approval; however, if requested, items requiring action can be brought to the attention of the SBE.
- Dr. Stegall stated that the grant also included puberty education and wondered if youth development support was a part of the allotted monies.
- Dr. Essick clarified that the funding supported positive youth development, professional development, child abuse prevention, sex trafficking training and puberty education for fourth and fifth graders.
- Chairman Davis asked if the funding supports the districts. Dr. Essick specified that there are 29 districts supported by these funds. Chairman Davis specifically pointed out that funding allotted to districts - the SBE has an interest of knowing about and responding to complaints received, which clearly is a policy issue.

2. DISCUSSION

a. HRS 1 - New Policy: School-Based Mental Health Policy

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- The Multi-tiered System of Supports (MTSS) framework provides a continuum of social emotional and mental health supports for students and organizes Social Emotional Learning (SEL) and School Mental Health (SMH) resources to promote equitable policies and practices that provide:
 - universal promotion of mental and social-emotional wellness and prevention through core instruction, curriculum, and environment
 - early intervention for mental and social-emotional health as part of the PSU's intervention system
 - risk assessment, referral or partnership with community providers, treatment, and re-entry
- Dr. Matt Hoskins, Assistant Director of Exceptional Children Division reminded Board Members that Social Emotional Learning (SEL) alone will not solve longstanding and deep-seated inequities in the education system, it can help states, districts, and schools promote understanding, examine biases, reflect on and address the impact of racism and other public health challenges while building cross-cultural relationships and cultivate adult and student practices that close economic status as well as race gaps to create more inclusive school communities. In doing so, the SBE can promote high-quality educational opportunities and outcomes for all students.
- The presentation included an overview of how SEL and Student Mental Health (SMH) are integrated within an MTSS proposed policy. The critical nature is to provide a response to the data collected surrounding rationale, connection to SBE Strategic Plan, NC School Mental Health Initiative (NC SMHI), prior SBE policies, systemic ongoing work at NCDPI and Senate Bill 476 Session Law 2020 (from multiple stakeholders on the need for SMH and SEL. Support was driven by the COVID-19 pandemic. Additionally, an LEA reported on creation and implementation of systemic SEL.
- Dr. Lauren Holahan briefed the SBE on the sources used to create the draft policy, local school mental health plans or plan components such as universal prevention through core instruction, curriculum, and environment early intervention for mental and social-emotional health and wellness as part of public schools suicide intervention system and referral, treatment, and the draft copy of a re-entry drafted policy created for local school mental health training plans. Dr. Holahan shared components outlined in the drafted policy. The memorandum of understanding, suicide risk referral liability reporting protocol funding data and the completion timelines prescribed for each which will receive a review and update, if necessary, every 5 years.
- Dr. Hoskins provided the preliminary cost associated with state level support teams being available to support school districts statewide.

Initial cost needed to support Project Aware Recurring Cost and Total Recurring Cost Funding Infrastructures

Project Aware Funding \$46.00
 Infrastructure \$12.00
 Recurring Cost \$34.00
Total Recurring Cost \$45,000,000

Per Pupil Funding;
 Direct services to students 25% \$11,250,000
 Mental health promotion 18% \$8,100,000
 Professional development 12% \$5,400,000
 Data collection/ project evaluation 10% \$4,500,000
 Personnel 35% \$15,750,000
TOTAL 45,000,000

- Vice Chair Duncan opened the floor for reflections following the presentations before the SBE at its planning and work session.
- Mr. Ford appreciated and acknowledged the centering and inclusion of adding Native American and Indigenous voices in the feedback and conversations. Moreover, Mr. Ford realized that making sure the voices of American Indian Indigenous students are included as

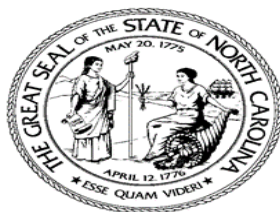
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well as educators in the SBE meetings.

- Dr. Olivia Oxendine commented on the discussion around social emotional limits was centered either directly or indirectly on the topic.
- Ms. Amy White related to the panel session this morning applauding it was excellent. Ms. White said that one of the discussions given made her pause and that was the part of the panel's discussion that emphasized on hiring educators that look like the students in their classroom. Recognizing that it is very important that students have someone in their school setting that resemble them, Ms. White shared that conversation became much more important and much more relevant to her when it shifted to the conversation about relativity and teachers having the knowledge, the skill set and the basic understanding of how to connect with a diversity of students.
- Vice Chairman Duncan thanked everyone for their participation in the Tuesday, October 6, 2020, Planning and Work Session. Vice Chair Duncan concluded and adjourned the for the day.

III. 3:35 PM -- ADJOURN

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**State Board of Education
Minutes
October 7, 2020**

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Attendees/Non-Voting:

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Nate Kolk-Tomberlin, High School Senior Advisor
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I. 10:00 AM -- 2020 Fall Planning & Work Session & Monthly Meeting of the North Carolina State Board of Education

A. Call to Order

1. Eric C. Davis – Chair

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- Chairman Davis called the State Board of Education (SBE) meeting to order. He welcomed all Board Members, advisors, staff, visitors, online listeners, and Twitter followers to the October 7, 2020, meeting of the North Carolina State Board of Education.
- Chairman Davis began by acknowledging that yesterday the Audio department experienced a few challenges but have worked tirelessly to address the issues. Apologizing for the interruption on yesterday, he mentioned that both yesterday, October 6, 2020, and today's meeting will be available by the end of the day on the DPI website and YouTube.
- Chairman Davis recalled discussion from Tuesday's meeting as he opened the floor for comments.
- Mr. James Ford acknowledged that most of the content, context and discussion from presenters was adjacent to the issues heard from students throughout the State who fit into the demographics that are all considered most marginalized. He then talked about students of color as well as their educational leaders, who by their own words have been found to be inspirational and hugely impactful in their educational journey. Mr. Ford recalled that committee members shared a lot of the challenges faced but seemingly, they are inspired to continue moving forward towards their future goals that are envisioned by the State Board as well.
- Ms. Jill Camnitz was reminded of every time the voice of a student is heard, it informs so powerfully the critical work being done and that she would love to see the SBE make that a regular occurrence.

II. PLANNING & WORK SESSION AGENDA

A. 10:05 AM -- SCHOOL TURNAROUND COMMITTEE (Ms. Amy White, Chair and Mr. James Ford, Vice Chair)

1. ISSUES SESSION - Translating Policy into Action

a. Ms. Effie McMillan

- Ms. Effie McMillan, from Winston-Salem, Forsyth County Schools (WS/FCS) shared that the district plans to ensure equity, equitable policies, strategic plan, and the levers of equity the team used to respond to COVID-19.
- Ms. McMillan told of Forsyth County Schools willingness to engage all students in high-quality, relevant learning experiences so that they graduate with interpersonal, academic and workforce skills to compete globally and contribute to society's envisioned workforce that are known as the best place to learn and work through excellence, collaboration, and inclusiveness.
- WS/FCS Student Racial/Ethnic Composition is made up by:
 - American Indian - <1%
 - Asian - 2.6%
 - Black - 28.5%
 - Hispanic - 27.4%
 - Multi-Racial - 4.5%
 - White - 36.7%
- WS/FCS' Equity Policy, 1100 Equity Policy requires that the Winston-Salem, Forsyth County Board of Education acknowledge and understand that there are several factors that impact student achievement including societal, economic, and historical factors. The Winston-Salem, Forsyth County Board of Education believes that a solid education for every child is the key to future economic growth, family development, civic engagement, and global participation. The Board is also committed to eliminating student achievement expectations based on social and cultural factors, including race and ethnicity, socio-economic status, gender, language proficiency, and disability and to support staff throughout the district. Noting, that moving forward there is an intention to remove discrimination

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against any individual on the basis of a protected classification in the administration in all educational and employment activities.

- WS/FCS seeks to provide all children a significant opportunity to receive a fair, equitable, and high quality education and to close the achievement gaps through four major areas of accessible learning opportunities, multiple measures of equity, resource equity and evidence based interventions.
- This policy identifies five pillars that impact student achievement and furthers the Board of Education's commitment to achieving equity in all aspects of education and to promote the social, emotional and physical well-being of every student. Ms. McMillan shared that the pillars for equity are recorded as school policy and organization and administration, school learning environments, academic placement, tracking and assessment, professional learning as well as standards and curriculum development.
- The Board of Education established the Office of Equity guided by the work of the district in creating, maintaining, and evaluating equitable educational opportunities. More specifically, the district develops plans that align with the district's strategic goals and objectives, where applicable. Plans will be reviewed annually for each pillar based on various data sets including but not limited to equity, achievement, discipline, student placement, family and the school climate survey. The Board along with stakeholders will appoint an Equity Advisory Council comprised of both internal and external representatives to establish the by-laws needed in governing functions listed within the Strategic Plan goals.
- The goals are:
 - Goal 1 is guided by Student Achievement and WS/FCS will raise student achievement, close achievement gaps and enable all students to take ownership of their learning.
 - Goal 2 is guided by Equity and Access that WS/FCS will ensure to be equal and equitable accessible. The quality of instruction will strive to eliminate barriers to rigorous and diverse opportunities. WS/FCS will provide quality instructional facilities and learning environments for all students.
 - Goal 3 is guided by Community Engagement from WS/FCS. The community engagement will build and strengthen partnerships and communication with families, local businesses, educational organizations, community agencies and advocacy groups in order to engage families and community stakeholders in the entire educational process for all students.
 - Goal 4 is guided by Human Resources and Development interactions with WS/FCS for the recruiting and retaining of a highly effective and diverse workforce that support district goals to ensure excellence for all.
 - Goal 5 is guided by the Climate and Safety from WS/FCS to foster an inclusive atmosphere that values the safety and well-being of all students, faculty and staff and to foster an environment that creates a sense of belonging.
- The equity levers were defined as the team established an instructional framework that was rigorous and features culturally responsive instruction, resources, accessible higher level courses, social-emotional learning, prepared teachers, principals, parents or family, community engagement and policy practices. There were additional considerations which revolved around access to remote and online learning, student engagement, mental health support, online learning for special populations, effective communication and professional development.
- Leveraging from every angle was required, stated Ms. Ms. McMillan. Through the creation of a guidebook that ensures areas of focus such as basic necessities, academic learning and the well-being of students. Access was granted to every student by providing by equipment, opportunities, basic needs in a productive learning environment. Support centers, community partnerships wraparound support, CARES Teams, meals and remote learning centers were launched to position students in excelling. This may include special modifications and support for those students with disabilities, those who have 504 plans, English Learners, migrant students, children experiencing homelessness, in foster care, students experiencing poverty, and students who are not equitably served

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through remote learning.

- In closing, Ms. McMillan shared policies and practices that will eliminate barriers and foster a growth mindset that replace the belief of perpetuated factors of achievement predictability giving students equitable access to learning opportunities in addition to providing high-quality professional learning opportunities for all staff. Culturally responsive instructional strategies and accelerated learning opportunities for every student. If there is an investment in recruiting and retaining diverse and high-quality staff, at all levels, equity driven, WS/FCS will close gaps, raise student achievement and effectiveness and prepare all students for college or career. By fostering conversation and supporting school leaders, teachers, establishing districts, schools, communities, and family partnerships every student will have access to a safe and inclusive learning environment. When support is provided, students are more likely to receive enriching opportunities and utilize restorative and culturally responsive practices, as well as, every student will have equitable access to learning opportunities and will be empowered to reach their full potential.
- Ms. Amy White praised the work done by the team emphasizing ‘the good work has gotten better’. She then opened the floor for questions or comments.
- Chairman Davis considered of the ways in which the WS/FCS district team implements equity into the everyday aspects of their teamwork in terms of disrupting, investing and supporting while empowering. Ms. McMillan first shared that team leaders lead and are focused with an equity mindset. Secondly, the partnerships align woven through of equity. Last, but not the least, conversations and agendas are always focused surrounding equity. Chairman Davis asked how the State Board of education (SBE) and Department of Instruction (DPI) can better assist districts that are doing well and those that are not making much progress. Ms. McMillan considered that many districts need technical and digital resources as well as preparing future educators for the task of teaching during summer planning months.
- Mr. Matthew Bristow-Smith proudly reflected on his years as a student in the WS/FCS district. He wondered about how staff/student relationships have increased with knowing and assisting students and their families outside of the school system. Ms. McMillan detailed schools that communicated their intentions, local, community and State officials who have expressed gratitude for educators taking part in students well-being outside of the school hours.
- Mr. James Ford acknowledged the portion of the presentation that mentioned the knowledge and explicit connection delivered by the SBE Strategic Plan Goals compared to the tasks performed by the Equity Office. Secondly, he recalled Goal 4 which stated that WS/FCS would invest in recruiting and retaining a highly effective and diverse workforce that support district goals to ensure excellence for all. Ms. McMillan observed in nearly 23 years of working in the educational field, each department is working towards a common goal working in sequence, but not overlapped by the same work.
- Ms. White summed-up her observation of the presentation as challenging, focused and intentional, disruptive in a manner of policies and practices not remaining the same, but working towards becoming a common educational good for all students - lead with the intention of offering high quality lessons while applying culturally responsive structured strategies. Vice Chairman Duncan requested the plan detailing the metrics used to measure the district’s equity progress. Ms. McMillan stated that the plan is still in development but could be provided at a later time.

b. Dr. Beverly Emory

- Ms. Amy White detailed Dr. Beverly Emory’s added responsibility with meeting the legal statutory requirements advised by the *Leandro* Case.
- Dr. Bev Emory the Director of Leandro to champion and facilities interagency in conjunction with the State Board of education, Governor Cooper’s Project Management Team alongside NCDI and Stakeholders reflected on Tuesday’s meeting when students and educators shared conversation surrounding their perspective opinion along with historical context about equity in education.

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- Dr. Emory gave an overview of important events arranged in the order of response to the correspondence received by the Department of Public Instructions in reference to the *Leandro* Case. Her role was to connect, intersect and facilitate the commitments to the court.
- Dr. Emory described the events as the approved 41 short-termed plan items according to *Leandro* 2021 Framework to Action. There were 7 items of concern which included teacher development and recruitment which ensures that high quality teachers are in every classroom supported with professional learning and provided with competitive pay, principal development and recruitment that ensures each school is led by a high quality principal who is supported with professional learning and provided competitive pay, adequate and equitable and predictable funding system and the assessment and accountability system that reliably measures growth and performance according to the *Leandro* standards and provides accountability consistent with the *Leandro* mandates. Assistance and turnaround support would be provided to low-performing schools and districts - a system of early education that provides access to high-quality Pre-K for all students so that they enter kindergarten on track for success, alignment of high school to postsecondary and career expectations as well as the provision of early postsecondary and workforce learning opportunities.
- The SBE/NCDPI Navigator template was introduced as part of the transition working collaboration that aligned the core work processes with SBE Goals and *Leandro* priorities. The drafted copy of the memorandum of agreement will soon be available for Board Members to view and support.
- Ms. Amy White agrees that the work will be completely and precisely done under Dr. Emory's leadership and supervision. Ms. Camnitz agrees that Dr. Emory is to be characterized as that 1 person who will carry out these tasks to the fullest.
- Chairman Davis acknowledged that the connection between education and the historic Oberlin Village District. A community filled with history that traces back to year 1863. Many students supported by SBE have educational background from those schools and university. Today, the historical area has been populated by apartment homes and businesses such as the many areas in and surrounding Raleigh. Oberlin being used as an example, Chairman Davis affirmed that change does not happen by chance but by intentional growth.

B. 11:30 AM -- myFutureNC SPECIAL COMMITTEE (Dr. Donna Tipton-Rogers, Chair and Dr. Olivia Oxendine, Vice Chair)

1. ISSUES SESSION – Building Bridges through Partnerships: Merging Goals and Objectives to Increase Opportunity and Access for NC Students

a. Ms. Cecilia Holden - CEO, myFutureNC

- Ms. Cecilia Holden – CEO of myFutureNC (MFNC) outlined the myFuture initiative and detailed the specific alignment to the SBE's attainment goals in combination with other influential leaders around the State.
- Ms. Holden highlighted data projections reported back in June 2019 surrounding the post-secondary credentialing targeted goal for NC. Current data reported that the year 2030 goal presents possibility of 300,000 credentials not being attained. The shortage would impact the State negatively. Two million post-secondary professionals, ages ranging between 25 to 44 would be needed to meet the expectations. Key performance indicators report that a greater outcome would be attainable by reaching out to under-served and unrepresented communities that show to be poverty filled with a lack of access to resources with the intention of improving education performance.
- Guidance in completing the Free Application for Federal Student Aid (FAFSA) which completers attend college compared to 55% of non-FAFSA completers and are available to receive federal student aid making college attendance more achievable well as a career in education reasonable. NC Colleges and North Carolina State Education Assistance Authority (NCSEAA) has the capability to determine student eligibility for state and school

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aid.

- Ms. Holden presented information that involved county attainment profiles containing specific “opportunities for growth” and:
 - Data that is unique to each of NC’s 100 counties
 - Highlights of county and regional performance on key indicators
 - Lists of specific opportunities for improvement that will ultimately lead to increased attainment
 - Facilitated decisions based on local priorities
 - Data that identified three actionable opportunity areas to improve future attainment outcomes
- Ms. Holden highlighted three concentrated areas of growth within county attainment profiles. 15 opportunities for much needed educational growth in areas of NC Pre-K Enrollment, Low-Performing Schools and FAFSA Completion.
- Other areas of awareness are college & career-ready in Math, transition to postsecondary, AP participation, school counselors, college & career-ready in Reading, career & college promise enrollment, disconnected youth, postsecondary completion, adult learners, first-year persistence, chronic absenteeism, high school graduation.
 - b. Ms. Elizabeth McDuffie - North Carolina State Education Assistance Authority (NCSEAA)
 - c. Dr. Kathryn Marker - North Carolina State Education Assistance Authority (NCSEAA)
- Dr. Kathryn Marker of North Carolina State Education Assistance Authority (NCSEAA) familiarized Board Members with the help that NCSEAA offers, goals shared in the collaboration with College Foundation of NC (CFNC) and NCDPI well as noted some program affiliates. Dr. Marker shared that the agency helps pay for college, teach educators procedures of how to assist students when applying for financial aid.
- Ms. Holden shared that in June 2020, myFutureNC reported the ‘FAFSA Frenzy’ highlighting 67 districts & 25 charters increased FAFSA completion utilizing the support tool recommended. North Carolina moved up to nineteenth in the national FAFSA completion rankings.
- Underway is a challenge called ‘FAFSA Frenzy’ that last through school year 2021. With the challenge school administrators will be able to utilize a tracking tool that keeps track of data and progress pertaining to the completion of students FAFSA applications. Finish the FAFSA, North Carolina’s FAFSA completion initiative benefits high school counselors so that they can identify students who have not filed a FAFSA, close the gap between submissions and completions, advise students regarding error correction or verification of submitted applications. NCDPI provides senior names to CFNC US Department of ED then sends FAFSA filer data to the NC grant system CFI for SEAA. CFI which matches NCDPI seniors with federal FAFSA filing data authorized Users then track seniors via finish the FAFSA within the CFNC Professional Tools.
- Currently serviced with FAFSA Data Sharing Agreements are all of NC High School Districts outside of one, as well as, all charter high schools excluding 24.
- NCSEAA Data Sharing Agreements salutes key partners who serve grades K-12:
 - NC Principal of the Year Matt Smith
 - Charter Teacher of the Year Doug Price
 - NC Teacher of the Year Maureen Stover
 - Brandi Bragg – NENC Pathways
 - Superintendent Association
 - CSAB
 - DPI: Regional Managers, OSC/Dave Machado, Cynthia Floyd, David Stegall

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- In alignment with SBE Strategic Plan Goal 1, Objective 4; Component 2, requested to add FAFSA Completion Rate to NC report card, add FAFSA Completion Rate as a field within the annual Graduation Data Verification Report, align SBE and MFNC Dashboards, leverage NC FAFSA Tracker to better target and serve students and schools upon release of funding to purchase a tool used for remediation. MFNC shares the vision and would like to aid in the support of NCDPI receiving funding.
- Ms. Holden shared Broadband Policy Recommendations for NCDPI that focused primarily on Readiness, Access, Completion and Alignment. This is a shared vision in connection to Broadband Access affordability & adoption.
- **Policy Recommendations:**
 - READINESS: Increased commitment to Career & College Ready Graduates (S.L. 2015-241) Readiness Access Completion Alignment, CCRG Remediation Resources: Provide necessary supports for staff, professional development, and an annual subscription for the online course platform that allows for student access to remedial math and English/Language Arts courses.
 - ACCESS: Increase awareness and access to advising on career and college pathways & federal financial aid Readiness Access Completion Alignment 36% or ~39,000 North Carolina high school seniors did not complete a FAFSA, leaving an estimated \$89M in federal Pell grants untapped by North Carolina students in 2019. NC Community College Career Coaches: Expand access for students to NC Career Coaches, community college employees who are embedded in high schools. Career coaches assist high school students with determining career goals and identifying community college programs that align with those goals. College Advising Corps: Increase current capacity in existing counties and expand to remaining 17 counties, to focus on college enrollment among low-income, first-generation college, and underrepresented high school students by offering guidance on college admission, financial aid/FAFSA, and enrollment. NCSEAA/CFNC: Staffing funding model - Ensure adequate staffing capacity for a focus on FAFSA completion. This is also a goal supported by the SBE. FAFSA communication campaign and tracking tool: Support awareness campaign, including virtual advising and nudging; and, a tracking tool for real time data on FAFSA submissions, completions, and verifications. FAFSA Incentives: Provide incentives for schools and districts to increase FAFSA participation rates.
 - COMPLETION: Reform Public Need-Based Financial Aid Programs, Public Student Aid Programs: Simplify public student aid programs to incentivize student progress and completion, guided by the UNC-NCCCS task force report and national models. Part-Way Home Student Aid: Target student aid for “some college, no degree” adult students with eligibility available to North Carolina’s two and four-year public and private, non-profit sectors’ state financial aid programs. College Advisors: Increase training and capacity of college success coaches and advisors to encourage student retention and on-time graduation. COVID-19 Student Supports: Identify and support students impacted by COVID-19 who have withdrawn or at risk for withdrawing from school. Prioritize recruitment and retention efforts to help them complete a degree or credential through targeted financial aid and advising.
 - ALIGNMENT: Define, standardize, and incentivize non-degree NC Workforce Credentials to align with in-demand living wage jobs, Workforce Training and Pathways: Provide resources to providers to support short-term training programs and pathways (e.g., develop new courses, update or modernize existing courses, support instructors, purchase equipment, reserve space to address identified gaps. Enrollment and Completion Incentives: Incentivize enrollment and completion of programs and high-value pathways through student supports (e.g., financial aid, exam fees, advising) and other education related costs.
- Ms. Jill Camnitz was impressed with the presentation shared by MFNC as she told of the Strategic Planning Committee plan to view the actions detailed in the presentation to align them with the work done by the Strategic Planning team. Ms. Camnitz assumed the data gathered pertaining to FAFSA completion possibly target ways to increase rates reported in effort of bringing attention to subgroups measured by a low completion status. Ms. Holden made known of the initiatives desire of having access to information that would break down data that desegregates by population. MFNC does have capability to desegregate by lowest reporting counties.

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- Ms. Amy White drew attention to the complex terminology used within FAFSA's instructions as she articulated strategies as an example, that could be difficult for families who may struggle with getting the forms completed. Ms. Holden welcomed the strategy spoken by Ms. White.
- Mr. Tony Jackson told about the partnership that has been generated between organizations sharing his opinion of MFNC having potential to become a 'game changer' and creating a cross-connection with the Equity Resolution to address Access Equity.
- Dr. Donna Tipton-Rogers honored by the partnership shared she has shared with MFNC gave admiration to the work efforts put forth by MFNC on educating students, families and educators on completing the FAFSA applications in hopes of higher education attainment.
- Mr. Matthew Bristow-Smith addressed the importance of systematic structure versus consequential outcomes. He recapped the advice expressed at Tuesday's meeting to let data make the decision when it comes to equity, suggestion of aggregating data to reflect subgroup measures, as well as adding FAFSA completion rates to NC report card.
- Vice Chair Duncan recapped the conversation surrounding getting a better understanding to replace the assumption many families have pertaining to FAFSA qualifications and completion of the FAFSA application due to the complexity of instructional verbiage. Vice Chair Duncan realizes that at times students are left to try completing the parent information portion of the application because parents' hesitancy in releasing personal information.

C. Approval of the October 7 - 8, 2020 Agenda

- Chairman Davis shared that all voting on items requiring action will take place tomorrow, Thursday October 8, 2020, via roll call.
- Chairman Davis reminded Board members of their duty to avoid conflicts of interest and appearances of conflicts of interest under Chapter 138A. He asked if members of the Board knew of any conflict of interest or any appearance of conflict with respect to any matters coming before them during this meeting. The Chairman then requested that if during the meeting members became aware of an actual or apparent conflict of interest, they bring the matter to the attention of the Chairman. It would then be their duty to abstain from participating in discussion and from voting on the matter.
- Chairman Davis reminded that the annual legislative budget priorities conversation will occur next month with an update overview inclusive of accounting expenditure reporting.

III. ACTION AND DISCUSSION AGENDA COMMITTEE REPORTS & MEETINGS

A. 12:00 PM -- EDUCATION INNOVATION AND CHARTER SCHOOLS REPORT (Ms. Amy White, Chair and Ms. Jill Camnitz, Vice Chair)

1. ACTION ON FIRST READING

- a. EICS 1 - NC ACCESS Timeline, Request for Application, and Rubric Revisions
- a. The Charter Schools Advisory Board recommends that the State Board of Education approve the NC ACCESS Program Subgrant Application, Rubric, and Timeline.
- Mr. Jay Whalen, NC ACCESS Program Administrator

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The NC ACCESS Program is entering the third year of its five year federal Charter School Program (CSP) grant and will begin the third subgrant application and approval cycle. The NC ACCESS Program is requesting approval of the updated subgrant application. Minor grammatical and terminology updates were completed that replaced two application questions to better align to the goals of the program, placed the question about how the education plan compares to or differs from the LEA with a question about interventions, support services, and additional educational opportunities, described the interventions, support services or educational opportunities that will be provided by the school and the plan for how the services or educational opportunities will be implemented and evaluated for success.

- Questions about the school calendar and the assessment program and how data is used to increase student outcomes.
- The rubric has been aligned for the two adjusted questions in the application outlined above.

Timeline:

- The updated request for application and rubric is recommended to be approved by the State Board on November 5, 2020 and posted publicly on November 13, 2020.
- Letters of Intent are due January 15, 2021 and applications are due March 1, 2021.
- The NC ACCESS Program team will provide several in-person and virtual training sessions through the application window.

Subgrant application recommendations will be brought to the CSAB in May 2021 and to the State Board for discussion in June 2021 and final approval in July 2021.

2. DISCUSSION

a. EICS 2 - 2020 Joint Legislative Education Oversight Committee (JLEOC) Virtual Charter Pilot Report

- The Charter Schools Advisory Board recommends that the State Board of Education receive the JLEOC 2020 Virtual Charter Pilot Program Report and approve the recommendations contained within the report.
- Ms. Ashley Baquero, Consultant in the Office of Charter Schools gave an overview on the Virtual Charter Schools Pilot Program Report. She shared background and legislation pertaining to virtual charters. The detailed North Carolina Session Law 2014-100 required the State Board of Education (SBE) to establish a pilot program to authorize the operation of two virtual charter schools serving grades K-12 beginning in the school year 2015-2016 and continuing for a period of four years with an ending date with school year 2018-2019. Prior to the end of the four-year pilot, Session Law 2018-5 extended the pilot program for an additional four years. The virtual charter school pilot program is now authorized to continue through the 2022-2023 school year.
- Student enrollment, withdrawal, courses offered by NC Virtual Academy and NC Cyber Academy, student performance data were discussed. Ms. Baquero also discussed the 5 year implementation plan, administration and funding of the programs and the proposed recommendations proposed by the Charter Schools Advisory Board. Ms. Baquero revealed the five year operational plan is in the second year - reminding that both schools have been in operation for 6 years of service.
- Reporting requirements initially focused on implementation posed by the SBE to submit a full letter of the piloted plans to the Joint Legislative Education Oversight Committee (JLEOC) by November 15, 2016 on the findings from the first five years for NC Connections Academy and NC Virtual Academy. NC Connections Academy changed their name to be NC Virtual Academy.
- Currently, the seven year operations plan is due to be sent to JLEOC by November 15, 2020, as well as the pilot program

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by November 15, 2022. At a minimum, the November 15, 2020, report shall include the following:

- The number of students who have enrolled in courses offered by the schools;
 - The number and types of courses offered by the schools;
 - Growth, withdrawal rates of students after enrollment;
 - Student Performance and Accountability data;
 - Information on implementation, administration; and
 - Funding for the pilot program and the recommendations on the modifications, continuations, and potential expansions of the program.
- Legislation provided three different funding streams for the virtual charter schools based on average daily membership (ADM), but excludes the per pupil share of low wealth and small county; traditional public and charter schools over the years based on 1st month ADM, but virtual charter schools are funded based on month 1 and month 5 Membership Last Day; and – traditional charters receive a per pupil share of the local current expense of the LEA in which the student resides. For virtual charters, this amount is capped at \$790.00.
 - Vice Chair Duncan speculated on whether the 12.5 percent allotted to support students with disabilities has anything to do with allowable income. Ms. Baquero mentioned that the data is taken from the Cedars system for federal reporting. Vice Chair probed if there is disaggregated data that shows specifically how the subgroups at each school currently measure this information. She responded yes - two years of information was reported.
 - Vice Chair Duncan referenced Requirement #6, from the JLEOC 2020 Virtual Charter Pilot Program Requirement Report being submitted requesting modifications, continuations, and potential expansions to the program the same as from the SBE. Ms. Baquero shared that the Charter Schools Advisory Board is making the recommendation for SBE discussion/decision.
 - The CSAB recommends that:
 - Both virtual charter schools shall submit a report to the CSAB and SBE, using available internal data such as check-in data or other formative assessments, showing areas of academic growth and challenge during the 2019-2020 school year for which state accountability data is unavailable. This report should be presented to the CSAB at its February 2021 meeting.
 - During the 2021-2022 school year, both virtual charter schools shall submit a report to the CSAB and SBE regarding the student experience at each school. The report shall include, at a minimum, information regarding: the instructional staff employed at each school, time spent actively online by students and teachers, the curriculum and software utilized at each school, student and family supports provided, sample of students daily schedules, learning coach requirements and support and data regarding the amount of asynchronous and synchronous instruction. The report shall also include data on mobility rates among each school's student population. In addition, both virtual charter schools shall conduct in-depth surveys of teachers, students, and families regarding stakeholder opinions on school academics, culture, and support. Survey results should include questions regarding the amount of daily time spent on instruction by students and support by learning coaches. The report and accompanying survey results should be provided to the Office of Charter Schools by July 1, 2022 for inclusion in the November 15, 2022 final legislatively required report on the virtual charter pilot program. The CSAB strongly recommends that this report and the accompanying surveys be facilitated and written by an external evaluator with expertise in virtual learning.
 - Accountability data for the two virtual charter schools be separated from aggregated data of "all charters" for state accountability reporting purposes. There are several reasons for this recommendation. First, virtual charters were established and extended through a legislative process as opposed to the authorization and renewal process of which all brick and mortar charter schools participate. Additionally, virtual charter schools are critically different from face-to-face instructional brick and mortar charter schools and therefore merit separate data analysis and consideration.

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- Lastly, Vice Chair wondered if it is true that virtual students would not take End-of Year testing. To her knowledge, students will test according to the State Testing Requirements. Ms. White reminded that the virtual charter school students did not test last school year, although this school year she hope that those who chose to engage will for purpose of transcript recording.

b. EICS 3 - Restart Rescind Request - Kannapolis City Schools

- b. It is recommended that the SBE approve the **Kannapolis City Schools Restart Rescind request**.

- Dr. Cynthia Martin, Director of District & Regional Support reiterated to Board Members the request to rescind the restart authorization for utilizing the restart model for Kannapolis Middle School.
- Kannapolis City Schools - the only Restart School in that district - listed the reasoning surrounding their request for flexibility provided through the Restart model has in previous years been beneficial, though now, assistance with redirecting financial resources and staffing is not beneficial.
- The school administration along with Dr. Daron Buckwell, Superintendent of Kannapolis City Schools, agree that the financial flexibility has not proven to be as beneficial as NC Star School Improvement Planning weekly check-ins for the principal with an assigned district administrator, routine reviews of budget and finances, and ongoing analysis of staffing and licensing can better support the school with other funding sources while utilizing allotted positions for staffing. The SBE will also continue to review the school's improvement.
- Ms. Julie Garber, Instructional Coach of District & Regional Support restated recommendations submitted to the SBE in March 2020.

3. (2) CONSENT ITEMS

a. EICS 4 - Woods Charter School's Request to Implement a Weighted Lottery

- a. The Charter Schools Advisory Board recommends that the State Board of Education approve **Woods Charter School's Request to Implement a Weighted Lottery**

- Ms. Amy White recapped Woods Charter School proposal of approval to implement a weighted lottery to increase its Economically Disadvantaged Student (EDS) population. Currently the school serves 5% EDS. The school hopes to increase its EDS population up 24 to 25 percent to reflect the surrounding counties' more closely. The school's plan for implementation includes considerations for marketing, specified funding for EDS populated support and teacher development. Ms. White noting that the school seeks to be approved not based on an Access Grant application.

b. EICS 5 - Report to the General Assembly: Low Performing Schools

- c. It is recommended that the SBE approve the **Joint Legislative Education Oversight Committee Report on Low Performing Schools**.
- Ms. Amy White stated that the accountability statues from the year prior remained the same given that testing/accountability was waived last year due to COVID-19. The attached report details the statuses as approved last year.

B. 12:35 PM -- BREAK

C. 1:50 PM -- STUDENT LEARNING AND ACHIEVEMENT COMMITTEE REPORT (Ms. Jill Camnitz, Chair and

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Dr. Olivia Holmes Oxendine, Vice Chair)

1. NEW BUSINESS

a. North Carolina Personalized Assessment Tool (NCPAT) Pilot Update

- a. There is no recommendation at this time.
- Ms. Jill Camnitz shared information surrounding the Innovative Assessment Demonstration Authority (IADA) given to North Carolina Department of Public Instruction (NCDPI) by the U.S. Department of Education (USED) in June 2019. As approved in the IADA, NCDPI is developing the North Carolina Personalized Assessment Tool (NCPAT) with the intention of statewide implementation in 2023–2024.
- Dr. Tammy Howard, Director of Accountability Services disclosed that the IADA was in response to a proposal for a tool that would be used to assess student progress during the year and provide teachers’ with feedback prior to the end of year staged adaptive summative assessment. This system would provide an appropriate summative assessment for students’ various achievement levels but does not limit students’ ability to demonstrate proficiency. The through-grade interims and the staged adaptive summative comprise the North Carolina Personalized Assessment Tool (NCPAT).
- Dr. Howard shared that NCPAT system is utilized primarily online, except for students who have accessibility issues. The NCPAT is for reading and mathematics in grades 3-8, and the test item types are multiple choice, technology enhanced items, and possibly performance tasks for the interim or the summative.
- Superintendents’, charter school leaders’, accountability leaders’, CCB accountability leaders’ and chief academic officers’ feedback is being solicited during the development process. The Friday Institutes’ is supporting the creation of professional development and cognitive labs for NCPAT.
- The 2020–2021 school year pilot administered for grade 4 mathematics and grade 7 reading was delayed due to no statewide assessments in the 2019–2020 school year. The necessary items to build the 2019–2020 pilot assessments would have been embedded in the spring 2020 tests. This has not delayed the development timeline, and it is expected that full implementation will begin in 2023-2024.
- Initially in December 2018, there were only two districts and one charter school that submitted an interest to participate. Currently, there are 180 schools across 14 districts and 8 charter schools participating. The team is reaching out to non-participating districts and encouraging their inclusion and input.

2. ACTION ON FIRST READING

a. SLA 1 - Timeline Revisions - Schedule of Standards Development, Assessments, and Materials Adoption (SCOS-012)

- a. It is recommended that the SBE approve the **delayed standards development, assessments, and materials adoption schedule**.
- Ms. Jill Camnitz recapped the discussion pertained to extending approval by the SBE of standards, assessments and materials.
- Dr. Angie Mullennix, Director of K-12 Academics and Innovation Strategy requested a one-year delay of standard revisions due to the COVID-19 impacts. Specifically, all standards developments outside of Computer Science and Social Studies will be delayed until Spring, 2021-2022.

3. ACTION

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a. SLA 2 - Alternative Schools' Accountability Model Options for 2020-21

It is recommended that the SBE approve the **alternative accountability options as presented**.

- Dr. Tammy Howard, Director of Accountability Services presented data that list the 16 alternative schools submitted Accountability Model Options for school year 2020-2021.
- The 2020-2021 Alternative Schools' Accountability Model Alternative Model selections and Option C participation requests list is attached for SBE consideration.

b. SLA 3 - Joint Legislative Education Oversight Committee (JLEOC) Report: Career and College Ready Graduate Program (CCRG)

- a. It is recommended that the State Board of Education receive for submission to **the Joint Legislative Education Oversight Committee (JLEOC) the Career and College Ready Graduate Program (CCRG) report**.
- Ms. Jill Camnitz reported that there have been no changes to the report since the September 2020 board meeting.
 - The report is included in the presentation materials for SBE consideration.

c. SLA 4 - Report to the General Assembly: School Performance, Annual Report Cards for Schools, and School Building Reports - Accountability Measures for 1st - 3rd Grade Students (State Level Summary)

- b. State Board of Education members are asked to receive **the Accountability Measures for 1st – 3rd Grade Students (State Level Summary) report for submission to the General Assembly by October 15 deadline**.
- Dr. Tara Galloway, Grades K-3 Literacy Director reported results of the Accountability Measures for 1st – 3rd Grade Students report as clarified and modified within Session Law 2020-3 Senate Bill 704 and reported that the COVID-19 pandemic caused a delay with some school submitting their information initially. The opportunity to extend the ability of schools to respond was allowed to respond to this issue for more accurate reporting.
 - The bill requirements are in consideration of actions and circumstances related to the COVID-19 emergency. Section 2.7(e) requires districts to report the following data to the Board of Education in lieu of Accountability measures outlined in § 115C-83.10.
 - Dr. Galloway reminded that in September 2020 the discussion surrounding the Accountability Measures for 1st – 3rd Grade Students report for submission to the General Assembly was given. Presently, the next step is to provide a window of opportunity to Districts missing information to submit a response. Districts have been provided an open window of support to correct or collect data for review then submittal.
 - Dr. Galloway presented the revised data corrections submitted since the last reporting period.
 - Vice Chair Duncan sought clarity of first and second grade adjusted Read to Achieve percentage variations. Dr. Galloway perceived the original guidance listed coding that some districts utilized not on purpose causing a slight influx in totals. Those few districts have been coached on the actual reason for that code. Corrections to the data have been made.

4. DISCUSSION

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a. SLA 5 - Report to the North Carolina General Assembly: Four-Year Cohort Graduation Rate

- a. It is recommended that the State Board of Education approve the **Four-Year Cohort Graduation Rate**.
 - Dr. Tammy Howard, Director of Accountability Services briefly presented the Cohort Graduation Rate for the 2019-20 school year and the State's goal. Dr. Howard stated the 2020 the Cohort Graduation rate was 87.6 percent. The graduation goal for the 2019-20 school year was 88.6, thus the State did not meet the goal.
 - The SBE is required to report annually on progress toward graduation benchmarks and include strategies and recommendations for achieving those benchmarks. The attached report to the Joint Legislative Education Oversight Committee provides each district Cohort Graduation Rate and whether the district met the State goal of 88.6 for the 2019-20 school year.

b. SLA 6 - Career Technical Education (CTE) Essential Standards/Course Inventory (SCOS-005)

- b. It is recommended that the State Board of Education approve the **Career Technical Education (CTE) Essential Standards/Course Inventory**.
 - Mr. Trey Michael, Director for Career and Technical Education briefed the SBE on updates made to the Essential Standards and Course Inventory.
 - Mr. Michael restated the State's plan for Career Technical Education (CTE) review and revision to standards for courses every five years following an approved process. Some courses require revisions more often due to the technical nature of the content and the rate of change within certain industries. Based on reviews, gaps were discovered and corrected surrounding programmatic offerings and acquired new courses.
 - Lead by a timeline using a comprehensive pathway model for school year 2019-2020, a new State Plan related to Federal guidelines to include new career pathway models, comprehensive local needs assessment, credentials as measure of program quality and the big six essential employability skills. For 2021, updates that aligned industry credentials, updated work-based learning opportunities, revised course descriptions, added courses in several program areas to complete sequences in career pathways or addressed skills gaps to the CTE Course Inventory. These course corrections are recommended for approval.
 - Mr. Michael demonstrated the new NC Career and Technical Education Course Management System linked with NC Careers webpage - <https://center.ncsu.edu/nccte-cms/>.
 - Ms. Camnitz asked about ways students and educators would know about the website. Mr. Michael shared that marketing strategy will be used to inform all stakeholders.

c. SLA 7 - Career Technical Education (CTE) Credentials Report

- c. It is recommended that the State Board of Education receive the **Career Technical Education (CTE) Credentials Report for submission to the Joint Legislative Education Oversight Committee**.
 - Mr. Trey Michael, Director for Career and Technical Education provided updates on the evaluation of CTE credentials. The 2019-2020 budget allotted funds to enable secondary students to participate in credentialing exams and requires NCDPI to report to the Joint Legislative Education Oversight Committee on the number of CTE students that that earn community college credit and related industry certifications and credentials. There has been a dramatic increase in the number of credentials earned since DPI began collecting data in 2010-2011 and numbers have grown from 24,782 to 241,338 individual credentials during 2018-19.
 - Dr. Michael requested to work with Dr. Townsend-Smith on aligning a date in which CTE may return before the SBE to

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present on aligning offered secondary courses.

- Ms. Kimberly MacDonald, Program Director for Federal Accountability and Reporting, Career and Technical Education shared that the report highlights courses that are aligned to a particular career pathway. These courses have been endorsed by businesses and industries to document skills required to attain a job.
- Ms. McDonald reported data from 2019-2020 detailing the top credentials earned by students statewide and credentials earned by SBE Districts.
- Vice Chair Duncan marveled at how much effort was shown by the detailed report. He then observed reported percentages of public school units' credentials earned at a high rate well as low rates with large student populations. He questioned whether some students had earned multiple credits, and many did not, whether some of the courses offered were actually geared towards an occupation or more so towards training than academic. Ms. McDonald stated yes, data that is reported by some public school units have students that possibly earned multiple credits within one course and some courses may have been only a single credit course to earn credentials.
- Ms. McDonald advised there are educational courses outside academics that align to core standards delivered by course pathways that lead into a non-academic occupation under the new career pathway model for NC. She acknowledged that many courses are under audit with their accountability partners.

d. SLA 8 - Recommendation for High School Accreditation for John A Holmes High School of Edenton Chowan Schools

d. It is recommended that the State Board approve the **accredited status for John A Holmes High School**.

- Dr. Tammy Howard, Director of Accountability Services, provided the cross-divisional team's evaluation of John A. Holmes High School accreditation request. The team has submitted recommended John A Holmes High School receiving their accreditation status.

e. SLA 9 - Report to the North Carolina General Assembly: High School Diploma Endorsements

e. DPI staff recommends that the State Board of Education receive the **Report to the North Carolina General Assembly: High School Diploma Endorsements for submission**.

- Ms. Sneha Shah-Coltrane, Director of Advanced Learning and Gifted Education reviewed the Annual High School Diploma Endorsements Report.
- This report has shown to report a decrease in endorsements since 2019-2020 school year partly due to the partnership with UNC System, Community College System and the General Assembly whose desire is to have continued student progress measured utilizing benchmark reading scores from a nationally norm-referenced college admissions test, either the ACT or SAT, as a predictive criterion for success in college courses. This factor can explain the significant decrease from the previous reporting year and was expected because of the level of ACT scores typically received by NC's public school students. Furthermore, this was exacerbated because there are students who may not have been able to turn in their scores to the LEA to be counted towards an endorsement due to the buildings being closed as a result of the pandemic.
- LEAs only receive the one ACT score from the NCDPI administered assessment. Students have to bring in other scores if they would like them to be considered for this recognition. The second factor is attributed to the closure of school buildings due to COVID-19 during the Spring semester for all endorsements. Students may have chosen to take a PC19 for a certain required course, which would not be factored into the GPA. This seems to have related to the 5-9% decrease, without the reading benchmark. Additionally, decreases in the career endorsement can be attributed to decreases in credential attainment due to operational transitions to the NC Career Pathways model as

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per the 2018 legislation Strengthening Career and Technical Education for the 21st Century Act presented by Perkins V.

f. SLA 10 – Read to Achieve (RtA) Guidebook (KNEC-003)

- State Board of Education members are asked to review and discuss the **Read to Achieve (RtA) Guidebook**.
- Ms. Jill Camnitz recalled the Read to Achieve (RtA) Guidebook has not had an update since 2014.
- Ms. Tonia Parrish, K-3 Literacy Consultant detailed a comparison chart to compare the 2014 and 2020 updates to the guidebook.
- The guidebook serves as a structural framework for the North Carolina Read to Achieve program. The charts, narratives, and descriptions included in the guidebook are the Department of Public Instruction’s work with the implementation of this initiative. The K-3 Literacy Team provides support and guidance for implementation of Read to Achieve, which is detailed in the RtA Guidebook. The Read to Achieve Guidebook includes definition of terms used in Excellent Public Schools Act Legislation and information about implementation for each of the components in the law. Policy KNEC-OO3 reference the guidebook work provided by a link to updated policy information.
- Ms. Jill Camnitz asked questions about recent changes to the DPI organizational chart. With being mindful of responsibilities that are defined in the Constitution, the *Leandro* plan, and the Read to Achieve legislation. The Strategic Planning Committee and the SBE has worked together to develop a clear plan for the improvement in our early learning literacy instruction implementation plan. Ms. Camnitz realizing that this is just the beginning of the critical work to be done within early literacy instructional plans, feels it is imperative that there be a clearly appointed leader within the initiative instead of a team or combination of people in order to move this work forward and also to be ready to support new leadership that will be available in the next three months.
- She suggested that Dr. Bev Emory work cross-functionally with teams to develop a program or a structure that supports the SBE, NCDPI and General Assembly priority.
- Ms. Camnitz asked Superintendent Johnson to take part in discussion surrounding the designated person for the Read to Achieve requirements. Superintendent Johnson assured her on the choice of Dr. Bev Emory and Dr. Stegall collaborating on the matter. Ms. Camnitz requested the plan of action be submitted to the SBE. Superintendent agreed to the request.

5. (3) CONSENT ITEMS

a. SLA 11 - Changes to the 2019-20 Cohort Graduation Rate

- It is recommended that the State Board of Education approve the **cohort graduation rate corrections for the 2019–20 school year**.
- Ms. Camnitz provided an overview of the changes to the 2019-2020 Cohort Graduation Rate Report to the North Carolina General Assembly and reminded members that the document is available for reference in the SBE materials which includes highlights as presented by Dr. Howard earlier today.

b. SLA 12 - Report to the General Assembly - Educational Performance of Children w/Disabilities and Implementation of Policies to Improve Outcomes for Students w/ Disabilities

- It is requested that the State Board of Education receive **this report for submission to the Governor and the General Assembly**.
- Ms. Jill Camnitz provided an overview of the Educational Performance of Children w/Disabilities and

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Implementation of Policies to Improve Outcomes for Students w/ Disabilities report to the General Assembly.

- c. SLA 13 - Report to the General Assembly: Students with Disabilities – Definition of Residence
- c. It is requested that the State Board of Education receive **this report for submission to the Governor and the General Assembly.**
- Ms. Jill Camnitz provided an overview of the Students with Disabilities Definition. She summarized the discussion by stating that the item will be voted on at the Thursday, October 8, 2020, board meeting.

IV. 3:00 PM -- CLOSED SESSION

- Chairman Eric Davis concluded today’s meeting with reminders that tomorrow, October 8, 2020, the remaining committee meetings would take place along with voting on any action items. Chairman Davis acknowledged the participation from advisors, staff, visitors, online listeners, and Twitter followers at today’s meeting.
- Chairman Davis requested a motion for the meeting to proceed to closed session, noting for the audience and online listeners that the meeting will adjourn immediately following closed session.
- Vice Chair Alan Duncan made the motion to go into closed session for SBE to discuss the topics outlined below. Ms. Amy White seconded the motion.
 - Prevent the disclosure of privileged or confidential information under
 - 09 NCAC 06B .0103 and .0309 of the North Carolina administrative code, and
 - Consult with our attorney.

Motion made by: Alan Duncan
Motion seconded by: Amy White

Voting:

Jill Camnitz - Yes
 Reginald Kenan – Yes
 J. Wendell Hall – Yes
 Donna Tipton-Rogers- Yes
 Amy White - Yes
 James Ford – Yes
 Vice Chairman Alan Duncan - Yes
 Chairman Eric Davis – Yes

V. 4:30 PM -- OPEN SESSION/ADJOURN

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**State Board of Education
Minutes
October 8, 2020**

State Board of Education Vision: Every public school student in North Carolina will be empowered to accept academic challenges, prepared to pursue their chosen path after graduating high school, and encouraged to become lifelong learners with the capacity to engage in a globally-collaborative society.

State Board of Education Mission: The mission of the North Carolina State Board of Education is to use its constitutional authority to guard and maintain the right of a sound, basic education for every child in North Carolina Public Schools.

Attendees/Voting Members:

Eric Davis Chairman at Large
 Alan Duncan, Vice Chairman
 Dan Forest, Lt. Governor
 Reginald Kenan, Southeast Education Region
 Amy White, North Central Education Region
 Jill Camnitz, Northeast Education Region
 James Ford, Southwest Education Region
 J Wendell Hall, Member At Large
 Dr. Donna Tipton-Rogers, Western Education Region

Attendees/Non-Voting:

Mark Johnson, State Superintendent of Public Instruction, Chief Administrative Officer, and Secretary to the Board
 Anthony Jackson, 2020 Superintendent Advisor of the Year
 Maureen Stover, 2020 Burroughs Welcome Fund NC Teacher of the Year Advisor
 Mariah Morris, 2019 Burroughs Welcome Fund NC Teacher of the Year Advisor
 Kisha Clemons, 2020 NC Wells Fargo Principal of The Year Advisor
 Matthew Bristow-Smith, 2019 NC Wells Fargo Principal of The Year Advisor
 Nate Kolk-Tomberlin, High School Senior Advisor
 Bryce Womble, High School Junior Advisor

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I. 9:00 AM -- 2020 Fall Planning & Work Session & Monthly Meeting of the North Carolina State Board of Education

A. Call to Order

1. Eric C. Davis – Chair

- Chair Davis welcomed everyone to the October 8, 2020, Planning and Work Session meeting of the North Carolina State Board of Education and called the meeting to order. He welcomed all Board members, returning and new advisors, staff, onsite visitors, online listeners, and Twitter followers. He reminded visitors and online listeners that the Thursday meeting is the Board’s official meeting day, scheduled monthly for the first Thursday of the month and that committee meetings were held on Wednesday.
- Chair Davis shared that all Board materials are available by going to “SBE meetings” at www.ncpublicschools.org.
- Chair Davis read the Ethics Statement as required in compliance with the Chapter 138A-15(e) of the State Government Ethics Act. He reminded Board members of their duty to avoid conflicts of interest and appearances of conflicts of interest under Chapter 138A. He asked if members of the Board knew of any conflict of interest or any appearance of conflict with respect to any matters coming before them during this meeting. The Chairman then requested that, if during the meeting members became aware of an actual or apparent conflict of interest, they bring the matter to the attention of the Chairman. It would then be their duty to abstain from participating in discussion and from voting on the matter.

2. Pledge of Allegiance

a. Mr. Reginald Kenan

- Mr. Reginald Kenan led the Pledge of Allegiance

B. WELCOME TO NEW NC STATE BOARD OF EDUCATION ADVISOR

1. Mr. Bryce Womble - High School Junior Advisor

- Chairman Davis welcomed Mr. Bryce Womble to the SBE. Chairman Davis mentioned Mr. Womble’s student perspective as an as influential attribute to SBE.
- Mr. Bryce Womble gratefully thanked the board as he is looking forward to helping improve education in NC.

C. 9:05 AM -- PLANNING & WORK SESSION AGENDA

1. CLOSING KEYNOTE - Together We Can: Leadership & Partnerships to Meet our Goals

a. Ms. Kisha Clemons - Principal of the Year Advisor

- Ms. Kisha Clemons presented the session titled ‘Together We Can Leadership and Partnerships to Meet Our Goals’ related to Healthy, Safe Personalized Connections in school for success of students. Ms. Clemons discussed past, present and future goals and beliefs that are upheld at Shuford Elementary of meeting expectations demonstrated by WHY - every child having an identity with unique strengths, talents, and aspirations. The school transformed into a progressive equitable but inclusive learning environment that personalized every student’s needs.

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- Partnerships provided by mental health professionals, teachers and stakeholders were available to provide intensive support to students and families well as teachers with social and emotional support, a learning center culture and personalized learning framework. This work was implemented lead by a culture pathway designated on learning, leadership, collaboration and innovation. Educators collaborated on a multi-tiered personalized learning tool based on learner profiles, competency based progression, individualized learning paths and flexible learning environments. Progress measures are provided through EVAAS, the school growth accountability system. Funding partnership began with families and parent organizations.
- Mr. Matthew Bristow-Smith recognized that there is usually a process that matches qualities that principals have with a particular school as a good match, giving a reason to having high-quality leaders available in the reformation of schools.
- Ms. Clemons acknowledges that improvement is an ongoing process. Ms. Jill Camnitz centered her inspiration based on the word “action.”
- Mr. Bristow-Smith admired the focus of the presentation on committing to doing the work - supplying equity in education.
- Ms. Mariah Morris expressed her gratefulness for the discussion today in hopes that a statewide system is built surrounding the voices of educator opinions and thoughts, mirroring a system such as what is being done at Shuford Elementary.
- Vice Chair Duncan evaluated the presentation titled ‘Together We Can’ by a level of visible yet effective efforts, hard work and implementation resulting with successful outcomes, as he also wondered of ways to encourage urgency to those who are in positions of leading the way forward for students of NC.
- Dr. David Stegall acknowledged that teachers at Shuford Elementary focus more on helping every student realize and understand their strengths, capabilities and skills as an attribute.
- Ms. Maureen Stover praised the presentation explaining the “Why” - every child having an identity with unique strengths, talents, and aspirations, is why students are intentionally successful at school.
- Mr. Ford concluded sharing his views on the happenings in relation to year 2020 and the pandemic that pulled away at us but created a unique opportunity to come together.
- Chairman Davis resounded of the importance of leadership leading the way for change causing a necessary reaction of change within students.

D. 9:50 AM -- COVID-19 Updates

1. NC Department of Health and Human Services (NCDHHS): Deputy Secretary Susan Gale-Perry

1. In accordance with Session Law 2020-49 and Executive Order 116 issued by Governor Cooper on March 10, 2020, the North Carolina State Board of Education approve as official guidance for in-person instruction for all North Carolina public school units for the 2020-21 school year the requirements outlined in the North Carolina Department of Health and Human Services’ StrongSchoolsNC Public Health Toolkit (K-12) as amended on September 17, 2020, with the further revisions presented in this meeting today.
- Ms. Susan Gale Perry, Chief Deputy Secretary shared that reports of cases have stabilized mostly though there has been some reporting circulating since the State’s opening. The goal is to get kids back in school and lessen the chances of infection by using the 3-W’s related to washing your hands, wearing face protection and watching your distance. Testing is critical to the solution.

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- Ms. Perry began with a color-coded chart with data titled what are we learning about COVID-19 cases among school age well as data broken down by race. Data reporting that children ages five to seventeen are showing a steady trend with no significant increases nor disproportionality by race. The cases are presentably different in lieu of adults and race. Data showing Hispanic and Non-Hispanic children with positive COVID-19 cases ages zero to seventeen by Ethnicity were marked with disparaging totals of an increase of nearly twice the rate. She expressed the need of taking continued shared action on amongst children and adults. North Carolina Department of Health and Human Service (NCDHHS) will continue awareness well as encourage families to practice better safety measures.
- Ms. Perry clarified that cluster are not cases. Clusters consist of 5 or more cases by known affiliation. This tracking helps to verify the source of those infected. Grades K-12 has 24 cases of clusters since October 8, 2020, which 46 percent from private schools. There were 171 active clusters associated cases among grades K-12, 12 are marked as active and complete. Preschool and grades K-12 student cluster-linked deaths totaled 126 cases associated with currently active clusters as of October 6, 2020. 15 currently are active clusters, 88 among students and 44 among staff . Ms. Perry noted that more than 55 percent of student cases are linked to only two active clusters. Ms. Perry shared that clusters are posted publicly in efforts of reducing the spread. Additional information about grades K-12 cases that will be posted to NCDHHS website to inform local decision-makers about CDC considerations for school reopening utilizing indicators that align to NCDHHS's COVID-19 case tracking system. The system is capable to include questions about in-person school attendance during the exposure period.
- Ms. Rebecca Planchard, Senior Policy Advisor highlighted updated protocols being released on October 8, 2020 from the Public Health Toolkit for grades K-12 named StrongSchoolsNC. The changes will allow options for grades K-5 schools that are operating on Plan A. The option to exclude all household members if one individual is symptomatic, another is for school leaders' to report cases as a requirements to consult with Local Health Department and send Revised Reference Guides to be suspected, presumptive, or confirmed COVID-19 cases well as a Quarantine calendar examples.
- Ms. Planchard shared some enlightenment surrounding antigen testing being made available through the Federal Government to some of the local health departments across the state. Certain schools are receiving priority in receiving testing products provided that schools or districts show interest. A document was provided with logistics and recommendations followed-up with considerations of receiving test. The full list can be found in the Consideration Document on NCDHHS website.
- K-12 school that has experienced a cluster:
 - Could test all adults and children who were physically present on campus when the cluster was active
 - Routine repeated testing strategy
 - District is operating any in-person learning under Plan A or Plan B
 - District is located in a county that is currently in the red, orange, or yellow zone according to the CDC Indicators and thresholds for risk of introduction and transmission of COVID-19 in schools
 - Could test a portion or sample of adults and/or children (e.g., 5%) on a regular basis, weekly or monthly
 - Testing adults may be more effective as current data shows they may spread virus more efficiently than children
- Universal communities may:
 - offer one time testing of all children and adults as requirement for entry to in person learning
 - Recommend not requiring potential limitations of effectiveness only once, consistent with CDC guidelines that are probably more effective with routine follow ups, repeating the testing strategy

Don't forget the 3 W's! WEAR WAIT WASH

- Vice Chair Duncan raised awareness of feedback from colleagues in the teaching profession about the reporting on New York's' 1 percent positive rates after testing was approved, reminding that NC has shown to have around 5 percent, wondering if NCDHHS would share their outlook on school closures if the rate showed more of an increase. Ms. Perry recommended educators to look at the overall community spread and not to make decisions based off statewide metrics recalling that it has been the partnership shared between the SBE, CDC and NCDHHS of instituting some really strong

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strategies implemented from the StrongSchoolsNC toolkit.

- Chairman Davis inquired into the additional reporting requirements relating to districts and charter schools. Ms. Planchard shared the clarifications in response to school and districts to report every case of a student having an elevated temperature. Her response was no, due to guidance revisions clarifying that suspected even confirmed cases of Covid-19 must be reported to the local health department not necessarily to family and staff.
- Chairman Davis led in the reading of the official guidance recommendation for in-person instruction for all NC public school units for the 2020-2021 school year.
- In accordance with Session Law 2020-49 and Executive Order 116 issued by Governor Cooper on March 10, 2020, the North Carolina State Board of Education approve as official guidance for in-person instruction for all North Carolina public school units for the 2020-21 school year the requirements outlined in the North Carolina Department of Health and Human Services' StrongSchoolsNC Public Health Toolkit (K-12) as amended on September 17, 2020, with the further revisions presented in this meeting today, Thursday, October 8, 2020.
- <https://files.nc.gov/covid/documents/guidance/Strong-Schools-NC-Public-Health-Toolkit.pdf>

E. 10:15 AM -- STATE SUPERINTENDENT'S REPORT

- Superintendent Johnson gave appreciation to teachers returning back to the classroom under Plan B.
- Superintendent Johnson excitedly told of partnering with US Secretary of Education Betsy DeVos for a school visit in Hickory, NC.
- Superintendent Johnson provided a brief update on the \$335.00/family established by the General Assembly to help with remote learning. He expressed sharing the word of applying for the grant with parents of school age kids with regards to parents who had not filed income taxes. To apply, parents would need to firstly, meet the NC criteria then proceed to visiting NC Revenue website no later than October 15, 2020 to apply.

F. 10:30 AM -- LEGISLATIVE UPDATE

1. Mr. Freebird McKinney (Director, Legislative & Governmental Affairs)

- Mr. Freebird McKinney, Director of Legislative & Governmental Affairs acknowledged by the death of Ms. Julie Davis, a teacher at Norwood Elementary School in Stanly County.
- Mr. McKinney presented on Re-Opening Schools, HB 1105 - Coronavirus Relief Act 3.0 deadline to apply for the \$335 checks for parents on how to get the money and when. Provided by hyper-links that reference data that the user can follow by clicking or tapping.
- Joint Legislative Education Oversight Committee held a meeting on Tuesday, October 6, 2020 at 10am. NC DPI presented on Requirements of Remote Instruction required in House Bill (HB) 704 well as micro-credentialing.
- Mr. McKinney briefed the Legislative Priorities provided by NC SBE- 2025, a Statewide Strategic Plan of Action. There was also mentioning of the request that were made in the June 4, 2020 budget and highlights of School Accountability and Teacher Effectiveness Models, School and District Assistance and Turnaround, Connecting High School to Postsecondary and Career Opportunities, Increasing NC DPI Support Positions opportunity, Support for CCRG, and CTE Budget Requests.
- Mr. McKinney confirmed the request of meeting with Board Members individually.
- Mr. McKinney informed of updates to Community Affairs that had not been added prior, briefing From the Field communications

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partnerships titled “Strategies and Lessons Learned in Communicating During the COVID-19 Pandemic” well as information on Educator Preparedness, the virtual lab event NC Strategic Teacher Recruitment opportunities with recruitment and Intentionality, Diversity, and Excellence.

- A reminder was provided to Board Members to attend The Innovation Project's (TIP) Upcoming Lunch & Learn Series titled “The Historical Opportunity for Courageous Leadership” as he gave salutations to Ms. Ann McColl for her great work.
- NCCAT NC TOY Leadership Professional Development Seminar will be held on October 15th- 17th, 2020.
- A new partnership established with ESL and Latinx coalition with emphasis on remote learning surrounding featured content Contents: Meet the educators, how have you had to adapt your work during remote learning?, What keeps you up at night?, additionally, With all these uncertainties, what is the one thing you want your students, your families, and your peers to keep in mind moving forward?
- Mr. McKinney shared a few educator inspired acknowledgements and successes; presentation made at the NCASA School of Law and Policy Symposium, 2018 POY Mr. Tabari Wallace appeared on Ellen DeGeneres Show, NC State in partnership with SBE represented at the 2020 National Juntos Convening by spokesperson Ms. Diana Urieta, Board Members visited Gates County Schools with Superintendent Dr. Barry Williams, visited four schools in Perquimans County with Superintendent Dr. Tanya Turner, and Hertford County Schools with Superintendent Dr. William Wright classroom visits.
- Chairman Davis applauded the fantastic job of exchanging learning opportunities and insight to Superintendents across the State, as he jokingly renamed the Ellen DeGeneres Show after Mr. Wallace.
- Chairman Davis encouraged schools to participate in a survey to study remote learning impacts - insight into student and educator knowledge to develop remote instruction resources for the state provided with a \$17.6 million dollar grant.
- Chairman Davis noted that any item requiring action will be done at the end of the agenda by a roll call and proceeded to committee reports for the day.

II. ACTION AND DISCUSSION AGENDA COMMITTEE REPORTS & MEETINGS

A. 11:00 AM -- EDUCATOR STANDARDS AND PRACTICE REPORT (Dr. Olivia Holmes Oxendine, Chair and Ms. Amy White, Vice Chair)

1. ACTION ON FIRST READING

- a. ES & P 1 – Membership Recommendation for the Driver Education Advisory Committee
- a. The State Board of Education is asked to approve the **names submitted to serve remaining and/or two-year terms as members of the Driver Education Advisory Committee.**
- Ms. Amy White outlined the membership recommendations for the Driver Education Advisory Committee. The request includes a list of 19 members needing approval from the SBE to serve remaining or two-year terms as members of the Driver Education Advisory Committee.
- There were no additional comments.
- b. ES & P 2 – Policy Amendment: Career and Technical Education (CTE) Limited Local Course Option License (CTED-004)
- b. It is recommended that the State Board of Education approve the **technical correction to CTED-004.**

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- Ms. Amy White outlined the technical correction needed for the Career and Technical Education (CTE) Limited Local Course Option License (CTED-004) policy.
- There were no additional comments.
- c. ES & P 3 - SBE Policy Amendment: Job Classification for Non-Certified Public School Employees – Educational Interpreters (EVAL-001)
- c. It is recommended that the State Board of Education approve the **Job Classification for Non-Certified Public School Employees - Educational Interpreters (EVAL-001) policy amendment**.
- Ms. Amy White outlined the Job Classification for Non-Certified Public School Employees and Educational Interpreters (EVAL-001) policy amendment.
- There were no additional comments.

2. ACTION

- a. ES & P 4 – North Carolina Professional Educator Preparation and Standards Commission (PEPSC) Report for 2019-2020 to Fulfill Requirements of Senate Bill 599 (Session Law 2017-189)
- a. It is recommended that the State Board of Education receive the **Professional Educator Preparation and Standards Commission Report for 2019-2020 as presented**.
- Ms. Amy White outlined the Professional Educator Preparation and Standards Commission Report (PEPSC) for 2019-2020 as presented.
- There were no additional comments.

B. 11:35 AM -- BREAK

C. 12:35 PM -- BUSINESS OPERATIONS COMMITTEE REPORT (Mr. Alan Duncan, Chair and Mr. Todd Chasteen, Vice Chair)

1. NEW BUSINESS

- a. COVID-19 State and Federal Funds Overview
- Ms. Alexis Schauss provided an update to the final breakdown of Covid-19 funding and status updates since September 30, 2020.
- Chairman Davis inquired on the status of funding that has expired. Ms. Schauss established that there is finding in the amount of \$50 M that had expired but has reverted back to the State's account as of June 30, 2020. She additionally mentioned the \$12 M from Summer Grant Funding and \$2.2 M for School Nutrition permitted by the General Assembly. Intentional Hold-over of \$2.2 M for School Nutrition that will be calculated towards School Transportation was clarified by Vice Chair Duncan and Ms. Schauss.
- Vice Chair Duncan requested to list particular expenditures with a deadline of December 30, 2020. He wondered if leaders are contacting districts by webinar to provide suggestions and option on utilizing funds in a purposeful manner. Ms. Schauss told that School Nutrition Department, well as NCPro participate weekly by webinar to discuss their spending. There has been guidance on how to revisit budgets provided for others.

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- Ms. Camnitz was grateful for the overview provided today.

2. ACTION ON FIRST READING

a. BSOP 1 – Approval of Contracts over 500 Thousand Dollars

- After an extensive discussion there were no additional comments.

b. BSOP 2 – COVID-19: Session Law 2020-97 (HB (1105) Requirement (ALOT-003)

- b. It is recommended that the State Board of Education approve the **allotment policy and the plan for distributing the funds to comply with Session Law 2020-97 (HB 1105).**

- Mr. Michael Nicolaides, Chief Information Officer provided an overview of the allotment policy and plan for the distributing of funds to comply with Session Law 2020-97, HB 1105.
- Mr. Nicolaides shared that NCDPI allocated \$2 M for cargo products. Vice Chair Duncan reported of the presentation materials being in fill details on eBoard for viewing.

c. BSOP 3 - Approval of Digital Learning Initiative Grants for Public School Units

- It is recommended that the State Board of Education approve the **applications identified by the grant evaluation team to distribute funding to school districts and charter schools.**
- Dr. Vanessa Wrenn, Director of Digital Teaching and Learning provided an overview for the approval of the applications identified by the grant evaluation team to distribute funding to school districts and charter schools. Dr. Wrenn told that all Public-School Units were eligible to apply for the competitive grant programs by April 27, 2020, but the deadline was extended through August 31, 2020.
- The North Carolina Digital Learning Plan recommended the provision of grants to support the development and dissemination of local innovative digital learning models. The goal is to have effective digital learning practices spread across all North Carolina K-12 public schools. All Public-School Units were eligible to apply for the competitive grant programs.
- Ms. Julie Gurganus, Digital Teaching and Learning Consultant told of the six school districts that are recommended for implementation:
 - There were 29 applicants for the Digital-Age Learning Initiative Grant Programs.
 - 16 Public School Units Applied.
 - The grant was in support of Public School Units developing new digital teaching and learning initiatives.
 - This is a one-year grant.
 - There were 13 Public School Units that applied for Implementation Grants.
 - The Implementation grants provide resources for Public School Units to jumpstart their plans for digital teaching, learning with funding.
 - This a two-year Grant.
- Ms. Lindsey Sipe, Digital Teaching and Learning Consultant reviewed the recommendations for the six out of thirteen schools. Five of those schools are traditional schools and one is a charter.
 - Recommendation: It is recommended that the State Board of Education approve the applications identified by

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the grant evaluation team to distribute funding to school districts and charter schools.

- Caldwell County Schools* Northwest \$50,000
- The Catamount School** Western \$6,000
- Community School of Davidson** Southwest \$15,000
- Hickory City Schools Northwest \$50,000
- Surry County Schools Piedmont-Triad \$50,000
- Wilson County Schools* North Central \$50,000

d. BSOP 4 – JLEOC Report: State Board of Education Waivers of State Laws or Rules Granted to Local Education Agencies

c. It is recommended that the State Board of Education approve the **Waivers of State Law or Rules Granted to Local Education Agencies**.

- Ms. Alexis Schauss, Chief School Business Officer for School Business Division mentioned to the Board Members that approval for the waivers of state law or rules granted to Local Education Agencies is administratively approved by the State Superintendent per SBE policy.
- The other item listed under waivers of state law or rules granted to local education agencies up for approval is the calendar waiver.
- During a review searching for items pertaining to COVID-19, no other issue items were found.

e. BSOP 5 - Report to the Joint Legislative Education Committee (JLEOC): Fifth Grade Career Awareness Program

d. It is recommended that the State Board of Education receive the **Fifth Grade Career Awareness Program for submission to the JLEOC**.

- Ms. Jaqueline Wyatt shared that the Fifth Grade Career Awareness Program for submission to the JLEOC is used to collect data on common practices used to introduce fifth grade students to Career and Technical Education (CTE).
- The survey has been updated with less questions, not requiring the same amount of time to be spent completing. During the CTE virtual conference the new survey will be introduced. The new survey can be done all year long decreasing the amount of time spent in effort of completing. Student participation for the year 2019-2020 was not required.
- Vice Chair Duncan reminded that the survey was a 90 question survey that now has 30 questions. Ms. Amy White asked who takes the survey? Ms. Wyatt referenced the CTE directors, school counselors, career development coordinators take the take the survey utilizing a Microsoft forum.
- Ms. White recommended that grade 5 students taking part in CTE readiness, Career Awareness Program opportunities should be combined with myFutureNC and the FASA process to supply them with experience.

3. (1) CONSENT ITEM

a. BSOP 6 – Certification of Finance Officer

a. It is recommended that the State Board of Education approve the **NC School Finance Officer applicants**.

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- Vice Chair Duncan shared that the recommendation for the NC School Finance Officer is for 2 Certificate Officers applicants now.
- There were no additional comments.

4. UPDATE ON CONTRACTS

a. Executed Contracts Report – October 2020

- After an extensive discussion surrounding the October 2020 Executed Contracts Report there were no additional comments.

5. REQUESTED UPDATES

a. Agency Vacancy Report

- After an extensive discussion pertaining agency vacancy there were no additional comments.

b. Monthly Budget Report (GOVR-007)

- Vice Chair Duncan stated that this update would be more detailed next month after undergoing the budget process to comply with the GOVR-007 policy. There were updates and modifications from the compliance revision process needed.

III. 1:45 PM -- CHAIRMAN'S REPORT/COMMENTS

A. Mr. Eric C. Davis

B. NEW BUSINESS

1. NC Education Corps Update - Dr. Mike Ward & Mr. John-Paul Smith

- Chairman Davis recalled the August 2020 meeting when the new partnership with NC Education Corps. There was a follow-up discussion that took place in September 2020 led by Mr. Mike Ward and Mr. John Paul Smith from the American Ripples Foundation, Co-Program Director to the Governor Cooper Volunteerism and Community Service
- Dr. Mike Ward shared the launching of NC Education Corps (NC Ed Corps) a capable, comparable, caring, committed and trained team of volunteers who will be designated to do the works prescribed of servicing students, families and educators throughout the State. Mr. Ward listed the qualifications of an ed Corps staff. He introduced Mr. John-Paul Smith.
- Mr. John Paul Smith, co-founder and CEO of American Ripples shared that Education Corps will operate as a recruiting school for student and educator volunteers. Corps volunteers qualified to serve are college graduates, community support, college students, retirees, veterans and military members who are willfully servicing to districts that are in mentorship. Applications will be available November 1, 2020, provided with information about NCEdCorps needs and criteria. Schools are able to submit applications by October 16, 2020 then in November . The Education Corps will recruit individuals who can help fill those needs. The functional date is set for January 2020. Funding is needed. Mr. Ward mentioned the conversations that have taken place with Superintendents around the state in regard to ideas they had on the recruitment process and much needed areas of assistance to students.

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- Superintendent Anthony Jackson thanked the NCEdCorps team for clarity of the organizations, scouting of volunteers with skillsets as listed, and meeting the needs of the community and students. Vice Chair Duncan see the initiative as visionary and excited to see the much needed task come forward. Mr. Ward appreciated the gratitude of the Board Members.
- Ms. Jill Camnitz asked if there was a support website to pledge a donation. Mr. Smith shared that the website is in progress with hopes of a link being added for pledge donations. Mr. Ward told of ways to donate or pledge. Chairman Davis offered partnership to the NC Education Junction Team.
- Mr. Matthew Bristow-Smith asked about ways of measuring the impact of the program, well as, hearing particulars of foreseeable program outcomes. Mr. Smith shared that the metrics are continuing to evolve surrounding immediate relief and renewal based need. This will help Corps volunteers to serve within multiple capacities, focus set on volunteering or serving as a staff member within schools, in pursuit of specified, oriented goals. Mr. Bristow showed interest in volunteers serving students in the capacity surrounding mental health? Mr. Smith embraced the thought of future NCEdCorps volunteers having training that could support students and families in the matter of a mental health challenge, though focus does specifically surround mentorship, the program funding could attribute to impactful training. Mr. Smith settled with thoughts of the SBE and NCEdCorps co-creating an initiative that would be setup to serve student, families and educators for that purpose.
- Mr. Ford thoughtfully approached the mission to eliminating gaps between Corps members serving in a capacity as an educator in regard to their professional development surrounding an induction process that would acclimate a Corp member to demonstrate their social and emotional intelligence. Volunteers who are going to be servicing in a diversity of communities throughout the State. What will be the training set forth to prepare volunteers?
- Mr. Smith shared that volunteers would undergo two types of standardized training; cultural competence training and social and emotional training prior to beginning their term, as well as ongoing training as they serve. Mr. Ford gladly wishes to join in conversation with the team. Mr. Smith noted if the SBE has ideas any, comments or suggestions that contribute to specific goals and needs that would generate betterment to the program , NCEdCorps would love to have those discussion.
- Chairman Davis expressed gratitude for the conversation and excellent suggestions surrounding proposal for the Equity Office, conversation amongst Strategic Planning Committee and Superintendent surrounding moving forward on the commitment of establishing an Equity Office under the leadership of David Stegall – who will now be a dual report. The position would report to Dr. Stegall as Deputy Superintendent Innovation. Next steps forward for the SBE is to identify what is needed within an equity office, the responsibilities, the rules, selection of staff and the expectations.
- Chairman Davis welcomed Board Member comments and suggestions to be provided to Strategic Planning on the Equity Office next steps forward. Chairman Davis confirmed Dr. Stegall’s commitment and detailed that any feedback should be sent to Dr. Deanna Townsend-Smith as the point of contact.
- Superintendent Johnson and other Board Members expressed their appreciation to Dr. Stegall character and work ethic.
- Chairman Davis stated the procedure of electing an Equity Office as official. Mr. James Ford articulated gratefulness to the choice of selecting Dr. Stegall to serve in the support of jump starting the Equity Office as he sought clarity of whether the Equity Officer would still be selection made by Strategic Planning. Chairman Davis clarified the procedure of selecting an Equity Officer. Chairman Davis thanked Superintendent Johnson for taking part in suggesting Ms. Katherine Johnson as a dual report to the SBE as well.
- Chairman Davis discussed selection of one vendor versus multiple vendors for the Grades K-3 Literacy Reading tool. Board Members may share in their opinion. Vice Chair Duncan acknowledged the ongoing research that has surfaced surrounding the vendor selection for the literacy tool. The SBE has a deep concern of this contract procedure and process design along with selecting an affordable vendor that offers a comprehensive package for the

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tool – process should be paused to gain additional information. He requested a report at the October SBE meeting detailing a revised timeline, pros/cons multiple vs. single vendor, research, etc.

- Following the discussion, the Chairman requested a motion to approve:
 - EICS (1 & 4 - 5), SLA (1 - 4 & 11 - 13), ES & P (1 - 4), BSOP (1 - 6) along with the respective meeting minutes.

IV. 2:00 PM -- VOTING (MEETING MINUTES, ACTION ON FIRST READING, ACTION, AND CONSENT)

A. Approval of Meeting Minutes

1. September 2 - 3, 2020 Meeting Minutes

2. September 16, 2020 Meeting Minutes

1. EICS (1 & 4 - 5), SLA (1 - 4 & 11 - 13), ES & P (1 - 4), BSOP (1 - 6)

Motion made by: Reginald Kenan

Motion seconded by: J Wendell Hall

Voting:

Jill Camnitz - Yes

Reginald Kenan – Yes

J Wendell Hall - Yes

Donna Tipton-Rogers – Yes

Amy White- Yes

James Ford -Yes

Lt Governor Forest - Yes

Alan Duncan - Yes

Chairman Davis – Yes

B. October 2020: Action on First Reading, Action, and Consent Items

1. StrongSchoolsNC Public Health Guidance Toolkit (K-12) as amended on September 17, 2020, with the further revisions presented in this meeting today.
 - **Lt. Governor Forest requested an amended motion** to amend StrongSchoolsNC Public Health Guidance Toolkit (K-12) as to include a full return to school for all grades, all districts and all charter schools not just for grades K-5. He requests the SBE, NCDPI and NCDHHS partnership. **Ms. Amy White 2nd the motion.** Chairman Davis sought clarity on the substituted motion whether to extend guidance to all public and charter schools, all grades including middle and high schools. Lt. Governor reiterated the motion is for NC Public and Charter schools to operate under Plan A, as to include all grades, all districts and all charter schools not just for grades K-5. Vice Chair Duncan toiled with the specified motion at hand is in reference to the Grades K-5 versus the grades K-12 toolkit. Superintendent Johnson sensing the confusion subjected reasoning into why the misrepresented legal guidance of the motion and amendment may be confusing. Ms. Jill Camnitz wondered if the alternative motion is in the SBE's authority given the executive order.
 - Chairman Davis recognizes that this may be a pragmatic involvement by NCDHHS health guidance

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recommendation that states grades K-5 return to school.

- General Counsel Ziko suggested this matter to be a closed session discussion while specifics are formulating, being verbalized. He also highlighted that open session is customarily for the SBE to endorse, approve the medical and health matters for the reopening of schools. The guidance noted from Governor Cooper on September 17, 2020 to include the Plan A option which he has authoritative decision over.
- He also stated that once Governor Cooper officiated the ruling of Plan A for grades K-5 reopening, that was the executive decision made, so after, the SBE has jurisdiction. Lt Governor suggested the verbiage ‘endorsed’ versus ‘approval’ can be misleading, handed from the Governor, can be contested on the grounds of the SBE is the responsible party of administering policy and regulations in regard to educating NC students. Chairman Davis stabilized the discussion by presenting remarks that reminded the vote is to improve the health guidance not to vote whether to open schools. **Lt. Governor Forest withdrew his motion.**

Motion made by: Reginald Kenan

Motion seconded by: J Wendell Hall

Voting:

Jill Camnitz - Yes
 Reginald Kenan – Yes
 J Wendell Hall - Yes
 Amy White- Yes
 James Ford -Yes
 Lt Governor Forest - Yes
 Alan Duncan - Yes
 Chairman Davis – Yes

V. 2:30 PM – ADJOURN

Motion made by: James Ford

Motion seconded by: Reginald Kenan

Voting:

Jill Camnitz - Yes
 Reginald Kenan – Yes
 J Wendell Hall - Yes
 Amy White- Yes
 James Ford -Yes
 Lt Governor Forest - Yes
 Alan Duncan - Yes
 Chairman Davis – Yes

Exhibit IV-12 October 23, 2020 Testing Growth Advisory Meeting

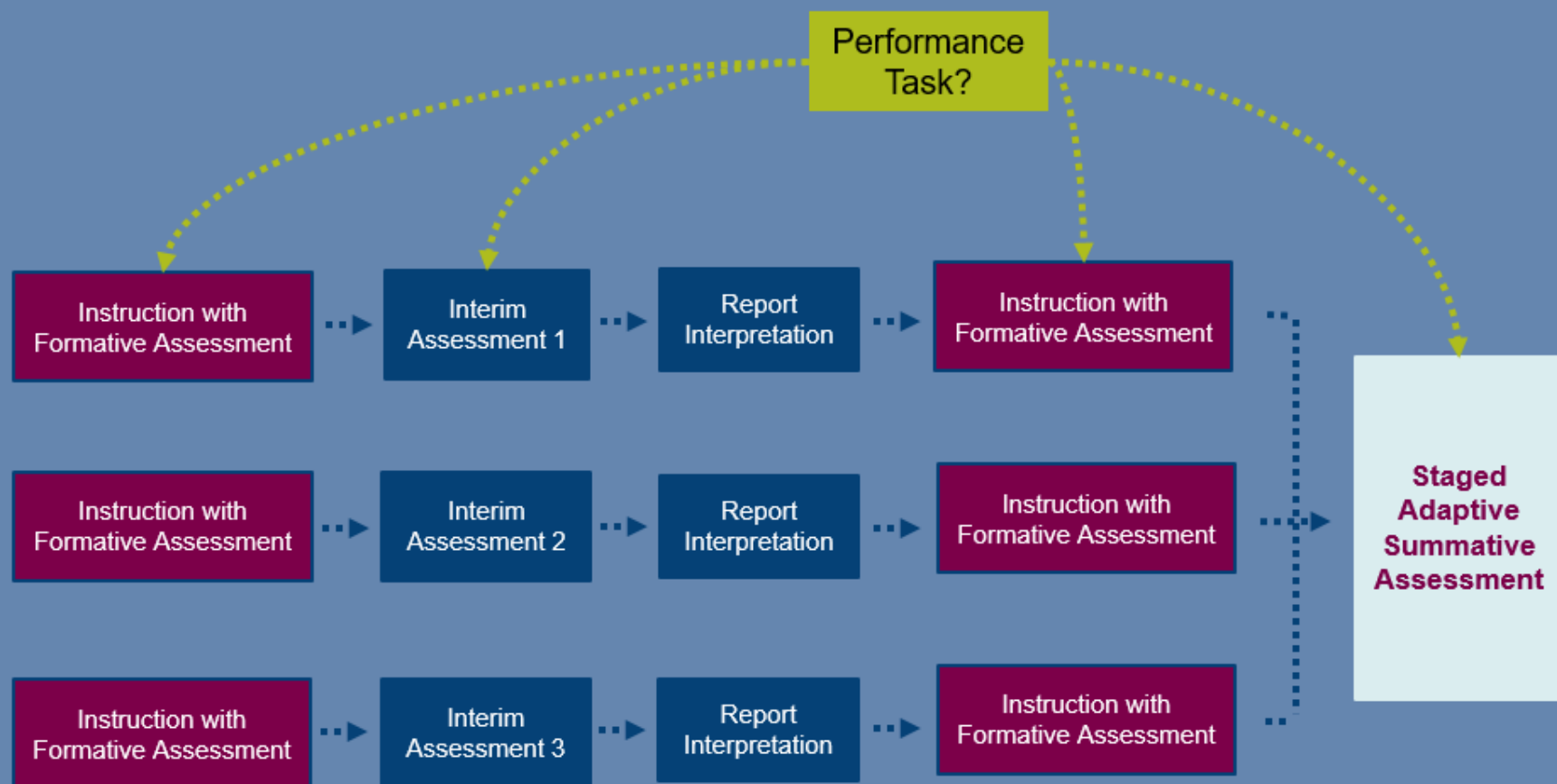


NC Personalized Assessment Tool

Northwest RESA Letter

Requests	NC Personalized Assessment Tool	Considerations
Current assessment model provides a single point of data at a single point in time	Balanced Assessment System: interims feed into a summative to increase measurement precision	Growth
Shorter assessments provide data throughout the year to guide instruction	Three interims provide data to help teachers adjust instruction throughout the year	
Secure testing atmosphere	Interims treated as a classroom assessment, summative standardized for accountability	Standardized administration needed for accountability
Pacing guide from DPI	Discussions with Standards, Curriculum, and Instruction	Local control
Authentic tasks and different item types	Obtaining feedback on performance tasks (what, where, when, how?) and developing TEI	Scoring, administration time, reporting
Annotate text/notes within testing platform	Updating NCTEST application to increase enhancement requests	

Balanced Assessment System



Standard Based Assessments using Performance Task

- There is no consensus definition of performance task.
- In general performance task range from activities that require students to perform a limited action to complex real-life or simulated activities in which students are expected to demonstrate their knowledge such as playing an instrument, conducting an experiment or writing an essay.

Standard Based Assessments using Performance Task

- The choice of what tasks to use in educational assessments generally depends on some broader practical and measurement constraints:
 - What type and how much data do we want to collect as evidence of students demonstrated knowledge?
 - What attributes about student learning are we trying to measure?
 - How much resources are we willing to commit to measure these attributes?

Samples -SBAC

Smarter Balanced Assessment Consortium

- **Performance tasks** (PTs) challenge students to demonstrate critical thinking skills on real world problems. They are a set of questions centered on a common topic that measure capacities, such as depth of understanding, writing and research skills, and complex analysis.

Samples -SBAC

English Language Arts Performance Tasks exist in two parts:

1. Students read information from multiple sources about a central topic and answer one or two research questions relating to that source material.
2. In a real-world "task," students construct an essay in the form of one of three writing purposes: either an Informational/Explanatory article based on a central idea, an Opinion/Argumentative essay on a position taken by the sources, or a narrative drawing from the source materials.

Samples -SBAC

Performance tasks are scored using **criteria-based rubrics** relating to three traits: Organization and Purpose, Evidence and Elaboration, and Conventions. The first two are scored on a 4-point scale while the third is scored on a 2-point scale. Separate rubrics are used for each of the writing purposes and are written to reflect different expectations as students become more sophisticated writers as they progress through the grades.

- [Opinion](#)
- [Explanatory](#)
- [Informational](#)
- [Argumentative](#)
- [Narrative](#)

Samples- SBAC

English Language Arts – Administered online

- Grade 3: Research/Inquiry
 - Matching, Short CR, Extended Response
 - Scoring Rubric: Grade 3: Astronauts Informational
- Grade 6: Narrative Writing
 - Matching, Short CR, Extended Response
 - Narrative Scoring Rubric

Estimated testing time: 2 Hours (over one to two class periods)



Samples -SBAC

Mathematics performance tasks require students to integrate skills across multiple domains, clusters, and state standards to demonstrate their ability to use their math knowledge to solve real-world problems. They elicit evidence of students' ability to “bring it all together” to develop a solution plan to the central challenge of the task.

- There are three types of mathematics PTs: Plan and Design, Evaluate and Recommend, and Analysis and Theory.

Samples -SBAC

General rubrics are used as the basis for scoring all items. Item-specific rubrics are constructed to facilitate the handscoring of short-text items. Every item-specific rubric should be able to map back to these general rubrics in a consistent and reliable manner.

- [Mathematics General Scoring Rubrics](#)
- [Smarter Balanced Scoring Guide for Short-Text Mathematics Items](#)

Samples- SBAC

Mathematics – Administered online

- Grade 4
 - Equation, Short Answer, Technology Enhanced Item
- Grade 8
 - Equation, Short Answer

Estimated testing time: 1 Hour



States using Technology Enhanced Items

State	Performance Task Item Types		Computer Scoring	
	ELA	Math	ELA	Math
Louisiana (2018-19)	<p>Evidence-based selected response -- students identify evidence to support the response</p> <p>Tech-enhanced items -- highlighting, drag-and-drop, drop-down and match interaction tables</p> <p>PCR -- extended, complete written response (narrative, literary analysis and research simulation)</p>	<p>Short answer</p> <p>Keypad input -- using a customized pallet of mathematical expressions</p> <p>Tech-enhanced items -- bar graph, drag-and-drop, drop-down and hot spot</p> <p>CR -- may use equation-builder; write explanation, model process or solve real-world problem</p>	<p>Automated Scoring for PCRs -- Pearson's Intelligent Essay Assessor scored four ELA items; 10% second reads</p> <p>Rule-based scoring - - for tech-enhanced and EBSR items</p>	<p>Rule-based scoring -- for tech-enhanced, EBSR and SA items</p>

(Data Recognition Corporation, 2020)

States using Technology Enhanced Items

State	Performance Task Item Types		Computer Scoring		Comments
	ELA	Math	ELA	Math	
SBAC 2017-18 (Bureau of Indian Education, CA, CT, DE, HI, ID, IN, MI, MT, NV, OR, SD, U.S. Virgin Islands, VT, WA)	PT -- Students read sources and respond to 2-3 research items (taking notes), followed by an essay based on sources and notes	PT -- Students receive stimulus materials and a follow-up item set	AIR Automated Essay Scoring	Rule-based scoring -- for tech-enhanced items like drag-and-drop, matching tables or equation entry (part of the CAT)	All SBAC PT's consist of three components: stimulus presentation, information processing and scorable products/performances The non-PT portion of the test is CAT

(Smarter Balanced Assessment Consortium, 2019)

States using Technology Enhanced Items

State	Performance Task Item Types		Computer Scoring	
	ELA	Math	ELA	Math
PARCC 2018-19 (DC, MD)	<p>PCR -- short and extended (literary analysis, narrative writing and research simulation)</p> <p>Tech-enabled items -- single-response or CR involving digital stimulus or open-ended response box</p> <p>Tech-enhanced items -- specialized interactions where performance is the means of data collection(drag-and-drop Venn diagram, plot data, etc.)</p>	<p>PT -- short-answer and extended response</p> <p>Tech-enabled items -- single-response or CR involving digital stimulus or open-ended response box</p> <p>Tech-enhanced items -- specialized interactions where performance is the means of data collection(drag-and-drop Venn diagram, plot data, etc.)</p>	<p>Rule-based scoring -- for tech-enhanced items</p> <p>Automated Scoring for PCRs -- Pearson's Intelligent Essay Assessor used for 90% of responses; hierarchy rules and smart routing apply; second reads of 10% of all responses</p>	<p>Rule-based scoring - for tech-enhanced items</p>

(New Meridian, 2020)

Administration and Timing for Performance Tasks

SBAC provided a breakdown of the timing of their Interim Comprehensive Assessments (ICA) by task and grade

Content Area	Grades	Non-PT Time (hrs:mins)	PT Time (hrs:mins)	Total (hrs:mins)
ELA	3-5	1:30	2:00	3:30
	6-8	1:30	2:00	3:30
	High School	2:00	2:00	4:00
Math	3-5	1:30	1:00	2:30
	6-8	2:00	1:00	3:30
	High School	2:00	1:30	3:30

Note. Adapted from *The 2017-2018 Interim Assessments Technical Report* (p. 81), by Smarter Balanced Assessment Consortium, 2019. Copyright 2019 by Smarter Balanced Assessment Consortium.

Administration and Timing for Performance Tasks

Louisiana Educational Assessment Program (LEAP) (Data Recognition Corporation, 2020):

- Three sessions for grades 3-8;
- Between 60-90 minutes per session for both ELA and Math depending on the grade;
- each session is administered in one block;

PARCC (PARCC, 2019):

- Between 75-90 minutes for ELA
- Between 60-90 minutes for Math
- 45 minutes for Science

Note: Test administration and timing for performance tasks were not mentioned in the technical reports for LEAP and PARCC

Performance Tasks

- Where would performance tasks best fit within a balanced assessment system?
- What standards should they cover?
- What item types should be included in a performance task?
- How should the performance task be scored?

Exhibit IV-13 March 24, 2021 Testing Growth Advisory Meeting

Testing and Growth Advisory

North Carolina Department of Public Instruction

March 24, 2021



Welcome and Introductions

Catherine Edmonds, Ed.D.

Deputy Superintendent, Office of Equity

Tammy Howard, Ph.D.

Director of Accountability Services

Thomas Tomberlin, Ph.D.

Director of Educator Recruitment and Support

Maxey Moore

Section Chief, Test Development

Curtis Sonneman

Section Chief, Analysis and Reporting

Kinge Mbella, Ph.D.

Lead Psychometrician

U.S. Department of Education Accountability Waivers and Testing Flexibilities

- Required Reporting
- Growth/Teacher Effectiveness

USED Waiver

- On February 22, 2021, the USED offered states flexibility from the requirements for assessment, accountability and reporting for the 2020–21 school year.
 - Noted the difficulty of the pandemic on schools and families
 - Committed to supporting states in assessing learning of all students

Accountability and School Identification Waiver Availability

- Not required to implement and report the results of the accountability system, including
 - Progress toward long-term goals and measurements of interim progress or indicators
 - Annual meaningful differentiation among schools using data from the 2020–21 school year
 - Participation requirement as it is used in the accountability system of testing at least 95% of all students and subgroups of students

Accountability and School Identification Waiver Availability

- Each state that receives this waiver will not identify new Comprehensive Support and Improvement Schools or Targeted Support and Improvement Schools based on 2020–21 data but will continue to provide services and support to previously identified schools
- Identifications resume in fall 2022 based on data from the 2021–22 school year

Accountability and School Identification Waiver Availability

- Given this waiver, to ensure transparency to parents and the public
 - State must publicly report the percentage of students not assessed, disaggregated by subgroup
- Encourages states to address other high stakes testing requirements for this school year

Assessments

- Testing should occur only in safe settings
- Statewide summative tests cannot be replaced by interims/benchmarks
- Flexibilities offered by USED for state consideration
 - Shorter version of a test
 - Technically, tests are as short as they can be
 - Remote administration, if feasible
 - Standardization and security
 - Extending the testing window, including the English language proficiency test
 - Already implemented

Assessments

- North Carolina has already taken the following steps
 - Expanded opportunities for test administrations as specified in the Testing Outside the Window process (EOCs and EOGs); testing allowed until July 5, 2021
 - Expanded the English language proficiency testing window by three weeks

Federal Waiver Status

- To accompany the January 21, 2021, waiver request, the U.S. Department of Education waiver request template was submitted on March 12, 2021
 - Additional public comment period not required
 - Rescinded the previously submitted addendum for 2020–21 school year accountability (long-term goals)
- Once the federal waiver is approved, consideration of related state statutes

Transparency and Public Reporting

- Vitally important that parents, educators, and the public have access to data on student learning and success
 - Maintain state and local report card requirements, including disaggregating all data by student subgroup
- As a condition of the waiver, states must publicly report the following in addition to the other requirements
 - Chronic absenteeism
 - Student and educator access to technology (as available)

Transparency and Public Reporting

- Reporting Requirements as Condition of ESSA Waiver
 - Continued identification of Comprehensive Support and Improvement and Targeted Support and Improvement school from previous year
 - Disaggregated subgroup reporting at school, district and state level
 - Academic assessments performance (at each achievement level)
 - Reading, mathematics and science
 - Including percentage tested and **not** tested
 - Cohort Graduation Rate
 - English language proficiency assessment
 - Number and Percentage exiting status
 - Number and percent of students with most significant disabilities tested on alternate assessment
 - State results of most recent NAEP assessments

Transparency and Public Reporting

- Reporting Requirements as Condition of ESSA Waiver
 - Disaggregated subgroup reporting at school, district and state level
 - Measures of school quality, climate and safety
 - In-school and out-of-school suspensions, expulsions, etc.
 - Students enrolled in
 - Preschool programs
 - Accelerated coursework
 - Professional qualifications of teachers
 - Per-pupil expenditures
 - Post-secondary enrollment

Transparency and Public Reporting

- How can we support communication around the data being reported?
- What other information should be reported publicly?
- What additional information would be helpful internally (not public reporting)?

Growth and Educator Effectiveness



Standard Setting for Reading Grades 3–8

Standard Setting 2021

- Tests:
 - EOG reading
 - NCEXTEND1 reading and science
- July 12–16
- Currently recruiting

Standard Setting 2021

- Standard Setting is required to set criterion grade level content expectation for new assessments that were created in 2019–20.
- The goal is to set new recommended cut scores aligned to recently adopted policy achievement level descriptors
 - Not Proficient, Level 3, Level 4, and Level 5
- The methodology used relies on North Carolina teacher's evaluation of content assessed on test forms in relation to grade level content standard expectations.
- Final cut scores recommendations are expected to be valid and should be interpreted with confidence.

Cautions

- Interpretation of performance outcomes might be less reliable or unstable due to the cumulative impact of Covid-19 on students from 2020–21 school year.
 - Distribution of student performance by achievement level
 - Norm reference comparison to previous years
 - Comparison with other related measures such as NAEP
- This caution applies to all assessment results from 2021 school year.

Innovative Assessment Demonstration Authority (IADA)

NC Personalized Assessment Tool (Pilot) Development Schedule

Year	Development Activity
2019–20	Planning Year with Item Development
2020–21	Test Specifications, Item Development, Cognitive Labs, Professional Development
2021–22	Administer Interims Grades 4 and 7 Mathematics and Reading
2022–23	Administer Interims and Multi-staged Adaptive Summative in Grades 4–5, 7–8 Mathematics and Reading
2023–24	Administer Grades 3–8 Mathematics and Reading (Potentially Statewide)

Updates

- NC Personalized Assessment Tool
 - NC Check-Ins
 - 2021–22 vs 2022–23 and beyond
 - Test specifications fall 2021 for remaining grades (math)
 - Three domains needed for indicator and to inform the multi-stage adaptive summative
 - Open window (October 1– April 15)
 - Dynamic reporting
 - Low stakes assessments for formative classroom use
 - Multi-stage adaptative summative (Academic achievement level)
- Partnered with the Friday Institute
 - Professional development
 - Cognitive labs
 - Continuous feedback

Local Testing Report



Local Testing Report Updates

- How is this going for you?
- Looking at how this data collected and analyzed
 - Two different pieces of legislations
 - When identifying districts above the state average, current methodology means there will always be districts above the state average
- Do you have any concerns with this reporting?
- What information would be useful to you?

QUESTIONS



Exhibit IV-14 Innovative Assessments Stakeholder Feedback



Innovative Assessments

Stakeholder Feedback

August 2021

Kevin Winn, Ph.D.

Shaun Kellogg, Ph.D.

*The William and Ida Friday Institute for Educational Innovation
North Carolina State University
Raleigh, NC*

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Overview

Throughout January and February 2021, the Friday Institute (FI) at North Carolina State University conducted sixteen interviews with 31 educational stakeholders who agreed to pilot the North Carolina Personalized Assessment Tool (NCPAT). Each of these educators had previously used the NC Check-Ins, a benchmark assessment tool administered three times a year to students in math and English language arts. The data from these assessments were used as formative data for educators to gauge how their students were progressing in their classes. Educators were able to use these data and incorporate them into their classrooms to inform their instruction.

As the NCPAT would be building off the popular NC Check-Ins, the North Carolina Department of Public Instruction (NCDPI) saw the importance and value of including teachers' and school leaders' voices in the development of the NCPAT. The NCDPI enlisted the FI to speak with educational stakeholders from school districts and charter schools around the state to seek their thoughts about the NC Check-Ins, what could be improved from the NC Check-Ins that could be incorporated into the NCPAT, and the types of professional development that would be the most beneficial for districts to receive when transitioning from the NC Check-Ins to the NCPAT. The following report documents the FI's major findings and takeaways from our sixteen conversations with the 31 educational stakeholders who are part of the NCPAT pilot.

North Carolina Personalized Assessment Tool

The first half of our conversations with educators covered how they had used the NC Check-Ins, the positive and negative aspects of them, and their anticipated concerns as NCDPI developed the NCPAT. From these conversations, we found that the NC Check-Ins had many positive aspects that educators hoped would carry over in the transition. They also provided us with areas of improvement and had questions about whether the purpose of the NCPAT would differ from the NC Check-Ins, raising concerns that the new format would be high-stakes and would require districts to realign their pacing guides.

Current Use of Benchmark Assessments

PLCs. The stakeholders we spoke with were overwhelmingly in favor of the NC Check-Ins, valuing the usefulness of the data they provided. Teachers and school leaders shared the various ways they incorporated the data generated from the NC Check-Ins into their instructional practice. For example, respondents shared that they used the data during PLCs, both within individual schools as well as across smaller districts.

Conversations with students. Respondents also shared that they used the Check-Ins data to work closely with their students. They taught their students how to read the reports, using them as a guide to have goal-setting conversations with their students.

Most Valuable Aspects of NC Check-Ins

Three themes stood out from the interviews with the stakeholders: item analysis, access to the test questions, and flexibility.

Item Analysis. Interviewees shared enthusiasm for the value they placed on the item analysis portion of the NC Check-Ins report. Specifically, the organization of the analysis was beneficial as it was tied to specific standards. This made the tool extremely usable for building classroom instruction for the next standard. Further, assigning Check-Ins to a particular standard was beneficial because the tests were shorter than the EOGs, alleviating testing fatigue, an important consideration for ELL students.

Access to test questions. Educators appreciated having access to the test questions for extended periods of time—and particularly the longer amount of time that they were granted during the COVID-19 pandemic. They explained that access to the test questions provided them with enough time to conduct “data dives” with fellow teachers, and it also helped students understand the language that was used in the assessments.

Flexible test windows. Multiple respondents shared their appreciation for the flexibility they were granted during the NC Check-Ins. This included flexibility in the testing windows, which allowed schools to administer tests according to their own timelines, individual needs, and local pacing guides.

NC Interims Concerns and Anticipated Issues

While interviews showed that educators were overwhelmingly positive about their experiences using the NC Check-Ins, they expressed concerns about the format of the data and hoped that some of the associated issues would be rectified with the development of the NCPAT. There were also concerns about how the NCPAT would be used. This stemmed from a culture of testing accountability. Educators really valued the data they gleaned from the NC Check-Ins, and they worried that the next version would become high stakes, which would defeat what they saw as the main purpose of the NC Check-Ins, which was to be a formative benchmark assessment. These issues will be outlined in greater detail below.

NC Check-Ins Platform and Data Logistics. Stakeholders shared that the NC Check-Ins platform itself could be difficult to navigate, at times feeling “clunky.” For example, reports were processed in various ways depending on which students had or had not completed the Check-Ins.

“I think not so much the assessment itself, but how the data's generated could be much more user-friendly.”

The unwieldy platform extended to the data output, which was the most frequent complaint from stakeholders. The actual data was valuable, but the PDF format required school leaders to spend significant time organizing it. For example, testing coordinators

printed out the PDFs on multiple pages, then physically copied and pasted them together so that students' data were all in one place.

"Somebody in that district ... has to take that data and make it electronic. Put it in a spreadsheet. Put it in a pivot table. If you have your own student data, it has to be hand entered."

High-stakes testing. Respondents indicated their anxiety that the NC Check-Ins, which they viewed as a very useful benchmark assessment tool, would become a high-stakes test as it transitioned into the NCPAT. This led to questions such as: (1) If the NCPAT replaces the current EOG, how will that be used for EVAAS; and (2) if the NCPAT does not replace the current EOG but is an additional test, which one would count toward EVAAS?

"I think the pressure of it being a part of the EOG process, I think will raise a little more anxiety..."

Curricular alignment and pacing. Respondents were concerned about how the new tool would align with both pacing and curricula across the state. As North Carolina does not have a statewide curriculum, stakeholders wondered how the new tool would affect that.

"One thing ... that has kind of been a concern for us is the pacing. With this new assessment tool, will there need to be a state mandated pacing and if so, how will that be developed?"

Small district concerns. Small districts were concerned because they would not only need to realign their pacing guides, but they would also need to change other related resources, such as updating Canvas courses for their teachers.

"If this assessment comes back and it's aligned differently than the Check-Ins are, it'll be a costly endeavor for districts..."

Consistency for students. Stakeholders shared concerns surrounding consistency in test taking for students. They wondered if students would take the NCPAT summative assessment one year, switch to a different format of the EOG the following year, then return to the NCPAT summative assessment again later.

Virtual environment. The COVID-19 pandemic brought about new issues for school districts, particularly as schools make decisions as to whether they will continue offering virtual options for students. District leaders were concerned that assessment scores may not be reliable when testing virtually, especially as some students made sudden, unexpected improvements. Some stakeholders attributed this growth to receiving extra help on the Check-Ins while at home.

Professional Development for NC Interims

During our conversations with stakeholders, we asked for feedback about the types of professional development that would best suit their needs and the needs of the other teachers in their individual schools and districts. Unsurprisingly, we received a variety of answers. Most notably, we noted differences in levels of experience incorporating student data to address student needs and inform teaching practices. Our conversations provided us with information that we passed along to the FI's Professional Learning and Leading Collaborative (PLLC)—the team tasked with designing the professional development for the NCPAT.

Professional Development Needs

Logistics and data usage. When asked to share what forms of professional development they needed and preferred, stakeholders advocated for two sources of information: (1) logistics training—including instructions on how to use the new reports and how these differed from those of the NC Check-Ins; (2) Data usage—including training on interpreting the data so it could be incorporated into instructional practices.

Practical and applicable. Stakeholders also emphasized the necessity for professional development to be practical and applicable. They valued having the time to practice and work with data prior to professional development training sessions so that they could ask questions about how to incorporate data into their classroom instruction.

General assessments. Finally, one district indicated that it would be helpful for NCDPI to have professional development on using assessments in general, and then specifically show how the NCPAT will be part of the larger assessment context.

Comfort Using Data

Novice level. Stakeholders indicated that their districts were at different places in terms of their comfort levels in incorporating data into their instructional practices. Some districts were at the novice level, indicating that understanding and using data to inform their instruction was a relatively new practice, and they would value professional development to assist them in implementing the data generated from the NCPAT into their teaching practices.

Expert level. On the other hand, many districts felt confident about their ability to incorporate student assessment data into instructional practices, but they indicated that they would need help interpreting the meaning of the data if it were different from the reports that they were accustomed to in the NC Check-Ins.

Teacher Use of Data

PLCs. Stakeholders shared the ways that they used the data in their schools and classrooms. Many indicated using the reports from the NC Check-Ins during PLCs, where small teams worked together to interpret data to inform their practices.

Student-teacher data conversations. Others also shared how they used the report data to start conversations with their students. For example, in one district, teachers and students interpreted data together and used it to set learning goals for the next term.

Preferred Learning Methods

When asked what teachers' preferred learning methods were for their professional development needs, we received many suggestions, some of which directly contradicted one another.

Train the trainer. Multiple respondents advocated for a train the trainer type of model, sharing it had been a useful strategy for them in the past. Others, however, were against this model, citing communication breakdowns unless the training was done extremely well.

Flipped model. Stakeholders valued a flipped training model, one where they received data in advance, had time to work with it, then receive feedback on how to use it. They also shared how it would be beneficial to use their own students' data to make it applicable to their own context.

Local Context. School and district leaders spoke about knowing their staff's strengths the best, meaning they knew which teachers would prefer asynchronous training and which ones would need synchronous assistance. These differences were often aligned by graduation date, with teachers who were more recent graduates of their education programs preferring asynchronous models versus teachers who had been teaching longer and who may have struggled more with utilizing technology.

Videos and manuals. There was enthusiasm for access to short instructional training videos about the NCPAT. Teachers were already familiar with using similar videos, and access to a bank of them to answer questions about the NCPAT would be helpful. Further, stakeholders also indicated that students would benefit from videos instructing them on how to take the new assessment.

Stakeholders praised the manuals that NCDPI has produced in the past that provided instructions on various assessments, and it is a resource that they would like to see continued.

Professional development timing

Opinions about summer professional development. Our conversations with stakeholders provided us with inconsistent answers on when they would like to receive professional development on the NCPAT. While many districts advocated for summer and early fall

professional development sessions, others said that summer would be too early. This was because with COVID, many teachers felt oversaturated with professional development. Further, hiring teachers at many districts would not be completed until early fall, or even after the school year started, meaning new teachers would miss out on training.

Alignment with NCPAT administration. Many advocated for professional development sessions to align with the times that the tool would be utilized (e.g., just prior to implementation of the tool or just prior to receiving the student data reports).

Ongoing. Access to professional development trainers would be useful in between official professional development sessions. Stakeholders wanted access to trainers in case any questions emerged, especially as they were learning a new assessment tool and its resulting data reports.

Additional Considerations for NCDPI

When we asked about any additional considerations NCDPI should take into account to ensure a smooth rollout of the NCPAT, stakeholders provided many recommendations. We categorized one set as communication issues. The other set of recommendations fell into more individual specifics that districts wanted to ensure that we knew about.

Communication

Early planning. Multiple school leaders hoped that communication would start early. Some indicated that they had not heard from NCDPI in a while about the status of the pilot, and as time passed, this became worrisome.

“I would kind of like to have some kind of update, where [NC] DPI is in this process ...”

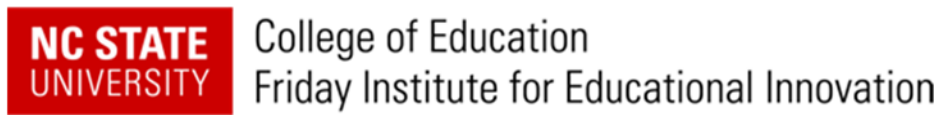
Alignment. Districts need to know how the generated reports will align with their own plans.

Community awareness. Parents and community members will have many questions about the new assessments that their children will be taking. Stakeholders noted that questions will arise especially as the pilot occurs because parents will wonder why some students are taking the new assessments while others are not. Further, communication tools to alert parents about assessments would be valuable.

“The public wants to know what we're doing, and they want to know why. So, if our why isn't clear, then the public is going to question what we're doing.”

Other rollout considerations

- **Test accommodations.** Educators expressed concern about equity and how testing accommodations would be considered with the rollout of the NCPAT. They asked how test accommodations would work if every student took an individualized test. For example, how would students with IEPs be accommodated, including students who would need their assessments to be read aloud?
- **Meaning of different EOGs.** NCDPI will need to be very clear about what the EOG will look like and what different assessments for each student means. For example, if a student had low scores on the first two benchmarks, how will that affect the standards that they are able to achieve on the EOG? Will there be three assessments plus an additional EOG?
- **Beta tested.** Educators wanted to make sure that the NCPAT it is properly beta tested before it is implemented.
- **Small district needs.** Some smaller districts worried about their ability to align their curriculum and standards to the new tool because of small staffs, and they would require extra help from NCDPI.
- **Timing.** Interviewees wondered when each step would occur? If NCDPI proposes a timeline, district leaders would appreciate if it stuck to it rather than continually pushing back deadlines.
- **Flexibility.** Stakeholders asked if there would be flexibility when assessments are given in order to align with individual school needs. Flexibility was an aspect that they largely supported.
- **Single-semester classes.** For schools/districts that have single semester classes, how will the NCPAT fit into that schedule?



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Exhibit IV-15 NCDPI Communications for Cognitive Labs



PUBLIC SCHOOLS OF NORTH CAROLINA

DEPARTMENT OF PUBLIC INSTRUCTION | Catherine Truitt, *Superintendent of Public Instruction*

WWW.DPI.NC.GOV

Date

TO: This will have to be hand keyed

FROM: Tammy Howard, Director
Division of Accountability Services

Thank you for agreeing to participate in the North Carolina Personalized Assessment Tool (NCPAT) Cognitive Labs. The North Carolina Department of Public Instruction (NCDPI), in conjunction with The Friday Institute for Educational Innovation at North Carolina State University (NCSU), looks forward to working with students and teachers in your schools. Dr. Shaun Kellog and Dr. Kevin Winn, researchers at the Friday Institute, will be the primary contact for information and next steps.

This letter is to share the next steps for participating in the NCPAT Cognitive Labs. Schools are asked to identify two to three teachers from grades 3–5, along with three to five students, to participate in the cognitive lab. The cognitive lab facilitators will select one or two teachers and their student pairings for participation.

Below is the recommended recruitment process to be used by schools when identifying teachers and students for participation in the Cognitive Labs.

1. Share the attached “Principal’s Memo” with principals in your district who have indicated they are interested in taking part in the cognitive labs.
2. Principals will identify two or three teachers in grades 3–5 to participate in the cognitive labs with their students.
3. Principals will also need to identify a staff member who will be available the day of the cognitive labs to: set up a computer for interviews, escort the students to and from the classroom, remain with the students during the interview, return the students to the classroom and supervise the classroom while the teacher is out of the room for the interview.
4. Principals will need to provide teachers with copies of the attached parent or guardian consent letter.
5. Teachers should identify three to five students in the class who would be appropriate to take part in the cognitive labs. These students should represent the continuum of achievement.

DIVISION OF ACCOUNTABILITY SERVICES

Tammy L. Howard, Ph.D., *Director* | tammy.howard@dpi.nc.gov
6307 Mail Service Center, Raleigh, North Carolina 27699-6307 | (984) 236-2716
AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER



PUBLIC SCHOOLS OF NORTH CAROLINA

DEPARTMENT OF PUBLIC INSTRUCTION | Catherine Truitt, *Superintendent of Public Instruction*

WWW.DPI.NC.GOV

6. After the appropriate students are identified teachers will explain to the students that they are being asked to take part in a program that will allow the state of North Carolina to collect important information on types of test questions for use with future students. The teacher will give the students a copy of the parent or guardian consent letter and form to bring home for their parents or guardians to sign and return to the teacher as soon as possible.
7. The teacher will collect the returned signed documents and return them to the principal by April 14, 2021.
8. Principal should scan or take pictures of the consent forms of participating students and email them directly to Dr. Kellogg at sbkellogg@ncsu.edu or Dr. Winn at kwinn@ncsu.edu.

The cognitive labs are expected to take place between April 19–May 7, 2021.

Thank you for your continued time and effort with the NCPAT pilot. Your participation in this endeavor will greatly benefit each student in North Carolina.

DIVISION OF ACCOUNTABILITY SERVICES

Tammy L. Howard, Ph.D., *Director* | tammy.howard@dpi.nc.gov
6307 Mail Service Center, Raleigh, North Carolina 27699-6307 | (984) 236-2716
AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER

District Letterhead

Date

TO: Principal

FROM: Tammy Howard, Director
Division of Accountability Services

NORTH CAROLINA PERSONALIZED ASSESSMENT TOOL COGNITIVE LAB STUDY PARTICIPATION

In 2019, twenty-eight districts and schools across North Carolina volunteered to pilot the North Carolina Personalized Assessment Tool (NCPAT). The goal of this new through-grade assessment tool is to provide timely and beneficial student assessment data that can be used by teachers to inform classroom instruction. As a part of this new tool's development, the North Carolina Department of Public Instruction (NCDPI) is partnering with The Friday Institute for Educational Innovation at North Carolina State University (NCSU) to conduct cognitive labs to support the development and implementation of new test question types. Dr. Shaun Kellog and Dr. Kevin Winn, researchers at the Friday Institute, will be the primary contact for information and next steps.

To better understand how students approach and understand new test question types, we request permission for selected students at your school, along with their teachers, to participate in this cognitive lab study. In order to obtain a representative sample across the state, the NCDPI seeks a diverse recruitment pool. Principals may recruit two to three teachers from grades 3-5, along with their students, as potential participants. Ultimately, one or two students and teacher pairings from the district will be chosen for participation. NCSU will notify principals, teachers, and students, if selected for participation.

Researchers from NCSU will conduct virtual interviews at the school site with participating students and teachers. During the cognitive lab, students will be asked to work through five to ten new types of test questions. As the student answers questions, he or she will be prompted to share his or her thought processes by thinking aloud while answering each question. Students will need approximately thirty to forty-five minutes to complete the cognitive lab. The session will be scheduled at your discretion to be as undistruptive to their learning as possible.

After the cognitive lab concludes, the students' teacher will participate in a short, fifteen-minute, virtual interview with NCSU researchers. Student and teacher participation is voluntary and all data will be stored in a password protected account belonging to NCSU. Only NCSU researchers and the NCDPI will see individual student responses and information. Participants' responses across the state will be combined to help gauge the accessibility and usability of new test questions.

If your school chooses to participate in the cognitive labs, you will help to facilitate the following steps:

1. Identify two or three teachers in grades three to five to participate in the cognitive lab with their students.

District Letterhead

2. Principals will also need to identify a staff member who will be available the day of the cognitive labs to set up a computer for interviews, escort the students to and from the classroom, remain with the students during the interview, return the students to the classroom and supervise the classroom while the teacher is out of the room for the interview.
3. Provide teachers participating in the cognitive lab with a copy of the attached *Teacher Participation in North Carolina Personalized Assessment Tool Cognitive Labs* memo, and copies of the parent or guardian consent letter and the parent or guardian consent form.
4. Instruct teachers to identify three to five students in the class who would be appropriate to take part in the cognitive labs. Appropriate students will fall at either end of the grading spectrum.
5. After the appropriate students are identified, instruct teachers to explain to the students that they are being asked to take part in a program that will allow the state of North Carolina to collect important information. Teachers will provide students with a copy of the parent or guardian consent letter and form to take home for their parents or guardians to read and sign. The consent form should be returned to the teacher as soon as possible.
6. Instruct teachers to return all documents (participants and non-participants) to you by April 14, 2021.
7. Principal should scan or take pictures of the consent forms of participating students and email them directly to Dr. Kellogg at sbkellogg@ncsu.edu or Dr. Winn at kwinn@ncsu.edu.
8. The NCDPI will review the collected forms, contact principals to communicate which teachers have been selected, and ask that the principals provide an appropriate time for the cognitive labs to be conducted in classrooms.

If you have any questions, please contact (hand keyed by district contact)

District Letterhead

Date

TO: Teachers

FROM: Tammy Howard, Director
Division of Accountability Services

**TEACHER PARTICIPATION IN NORTH CAROLINA PERSONALIZED
ASSESSMENT TOOL COGNITIVE LABS STUDY**

The North Carolina Department of Public Instruction (NCDPI), is partnering with The Friday Institute for Educational Innovation at North Carolina State University (NCSU), to create a through-grade assessment tool with the goal of making student assessment data more timely and beneficial at the classroom level. As part of this new tool's development, the NCDPI is conducting cognitive labs that will collect information and feedback from students about new test question formats. During a cognitive lab, students are asked to share their thinking aloud as they interact with new test questions.

Students participating in the study will be released from classrooms with another staff member to participate in a virtual interview with researchers from NCSU. Students will be asked to answer about 5–10 questions, which will not count as a grade. While answering these questions, the researchers will encourage students to explain their thinking aloud and to communicate the level of ease or difficulty with each question type. Students will need approximately 30–45 minutes to complete the cognitive lab. The teacher and the principal will identify a time that is least disruptive to their learning. Students' ability to correctly answer questions will not be measured.

After the cognitive lab concludes, the students' teacher will participate in a short 15–minute, virtual interview with the researchers from NCSU. Student and teacher participation are voluntary, and information collected will be stored in a password protected account belonging to NCSU. Only NCSU researchers and the NCDPI will see individual student responses and information. Personally identifiable information will be included in any of the data collections. Participants' responses across the state will be combined to help gauge the accessibility and usability of new test questions.

Your principal has selected you, along with several of your students, to participate in the cognitive lab. If you are interested in participating, please contact your principal for next steps.

Respectfully,

(District Contact's Signature)

School Letterhead

Date

Dear Parent or Guardian,

The North Carolina Department of Public Instruction (NCDPI), in conjunction with The Friday Institute for Educational Innovation at North Carolina State University (NCSU), is conducting cognitive labs (think-aloud interviews) to gain insight on how students approach new types of test questions for state exams. The NCDPI will use information gained from the cognitive labs to develop understandable, approachable, more engaging, and accessible question types for students. Your student has been selected to participate in these cognitive labs. As a participant, your student will take part in a virtual interview at school conducted by a researcher from NCSU. The researcher will ask your student to answer five to ten test questions and explain to your student that he or she should share his or her thought processes by thinking aloud as the question is answered. Student answers are not considered right or wrong, as the interviewer will be looking to see how your student engages or interacts with the questions, not if the student answers correctly.

Participation in this activity is voluntary, and the questions are not scored or counted for a grade. In consideration of student safety, the interviews will be conducted virtually, and a school staff member will remain with your student during the interview. The information collected will not be publicly shared and no student demographic information, such as student name, will be collected. Participant responses across the state will be combined to help determine the appropriateness of different types of test questions for possible use on future state tests.

The NCDPI appreciates your consideration of this activity. If you have questions about this study please contact your student's teacher.

To give permission for your student to participate in the cognitive lab, please sign the attached form and have your student return it to their teacher. Thank you for contributing to work that will improve test questions for North Carolina students.

Respectfully,

(School Principal's Signature)

Teachers Name: _____

Room Number: _____

Parent or Guardian Consent to Participate

I have read and understand the above information and consent for my student to participate in this activity.

[] Yes, I consent for my student to participate in this study.

Please complete the following information:

Student's name (please print) _____

Parent's or Guardian's name (please print) _____

Parent's or Guardian's signature _____ Date _____

I have read and understand the above information and do not consent for my student to participate in this activity.

[] No, I do not wish for my student to participate in this study.

Student's name (please print) _____

Student's name (please print) _____

Parent's or Guardian's name (please print) _____

Parent's or Guardian's signature _____ Date _____

Exhibit IV-16 Innovative Assessments Cognitive Labs Feedback



Innovative Assessments

Cognitive Labs Feedback

August 2021

Kevin Winn, Ph.D.

Shaun Kellogg, Ph.D.

*The William and Ida Friday Institute for Educational Innovation
North Carolina State University
Raleigh, NC*

NC STATE
UNIVERSITY

College of Education
Friday Institute for Educational Innovation

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Suggested Citation: Friday Institute for Educational Innovation (2021). Innovative Assessments: Cognitive labs feedback. North Carolina State University.
<http://www.fi.ncsu.edu/>

Introduction

Throughout the month of May 2021, the Friday Institute (FI) Program Evaluation and Education Research (PEER) Group conducted 12 cognitive labs with three third graders, five fourth graders, and four fifth graders in six districts throughout North Carolina. Participating districts/schools were The Academy of Moore County, Cherokee Central Schools, Granville County Schools, Scotland County Schools, Sugar Creek Charter School, and Watauga County Schools. The purpose of these labs was to obtain information for the North Carolina Department of Public Instruction (NC DPI) about how children thought about and approached new question types that are being considered for the North Carolina Personalized Assessment Tool (NCPAT).

Each cognitive lab lasted between approximately thirty minutes to an hour and was done remotely using Zoom or Google Meet. Due to technology glitches and time constraints, students were not always able to answer all of the experimental questions. Therefore, during the later interviews, the research team instructed students to skip some of the early questions and answer the last questions so that there would be data for all of the questions.

To meet the needs of the diverse student population of North Carolina, our team worked with school leaders and educators to recruit students from a variety of backgrounds.

Table 1. Participant demographics.

Gender	Girls	Boys		
	6	6		
Race and ethnicity	Black	Latinx	Native American	White
	4	2	2	4

Additionally, we worked with one EC student and one student with ADHD.

Our team spoke with at least one adult from each school district, usually the student's direct teacher or the principal of the school. Interviews with school-based adults helped us gather more contextual information, filling in the gaps where students did not always share enough information during their cognitive labs. Conducting these labs virtually sometimes prohibited our team from seeing everything that the student was doing.

The time we spent with students, teachers, and school leaders provided us with useful information to help guide NC DPI as it develops the NC Interims. Our report is broken down in parts, including a synthesis of the trends in general, then analyses from student feedback and educator feedback. In the final section, we provide a specific breakdown of each item where students struggled, had questions, or made notable comments.

Key Findings

Written Directions for the Students

Placement. Students and teachers regularly noted confusion surrounding the directions that students were instructed to follow. Students shared that the directions were inconsistently placed, sometimes appearing before the question while at other times they were placed after.

Multiple correct answers. Directions in the mathematics portion led to incorrect answers when students did not read carefully. For example, when directions stated, “select the *equations* that fit,” students regularly chose only one answer rather than multiple correct options.

Fill-in-the-blank questions. Mathematics instructions for writing in their own answers was also difficult, and teachers noted that they seemed tricky. When the directions instructed students to write their answers as an improper fraction or decimal even when the correct answer was a whole number, students tended to doubt their answers, taking extra unnecessary time on these questions.

New Question Types

Drag and drop questions. Although many students easily understood that they were to drag and drop their answers, there were some who struggled to make this happen on their device. We were told that third through fifth graders frequently only used one hand on their computer’s trackpads, leading them to make multiple attempts at properly dragging their answers across the screen and placing them in the correct spot.

Fill-in-the-blank questions. Students had difficulties with the fill-in-the blank math questions. First, students were confused when the directions instructed them to convert mixed numbers into improper fractions. Teachers explained that students are taught to simplify to mixed numbers in their classrooms, not improper fractions. Students were also unsure of where to locate the operation signs on the keyboard, particularly the fraction sign.

Support for new questions. Teachers noted how the variety in question types offered more stimulation and interaction for students who have difficulty staying on task. Students could not simply click through the questions without interacting with the test in a more substantive way. Teachers also shared that they believed the reading passage was appropriate for the different age levels.

Display Issues

Answer choices. Students struggled with the display of some of the questions and answers. On certain questions, students needed to scroll down to see the final two answer choices, and some did not realize that scrolling was an option.

Reading passage. One frequent problem that students faced was in the display of the reading passage. The passage only appeared on the first page, but there were multiple questions—each on different pages—that students were required to answer about the passage. This led students to click back and forth multiple times to reread portions of the passage. Teachers noted that on the current EOG tests, the reading passage remained permanently on the page while the questions changed, and they advocated for this format to be implemented within the NCPAT.

Other Concerns

Concern about multiple standards. Educators noted that multiple standards appeared in a single question, leaving them to wonder which standard was being assessed in each question.

Learning curve. Students attending schools where they had not used software similar to what will be used within the NCPAT may have a larger learning curve than those students who have experience with similar software programs. Although there was a learning curve for some students, many quickly figured out how to answer the new question types, including dragging and dropping their answers. They did not need to reread the directions on each page.

Student Feedback

In this section, we outline students' reactions to the new item types. This includes data from both during the cognitive labs as well as our interviews with their teachers afterwards. Although not all students participated in an interview after completing the cognitive lab, some did stay with their teachers and provided us with additional input about their experiences.

Approval of New Questions

Students shared their approval of some of the new question types. Of note was their enthusiasm for word substitution questions. They enjoyed when the choice that they selected replaced the synonym in the sentence.

Areas of Growth

Students shared areas where questions could be improved. These included logistical issues, where on-screen materials could be presented in simpler and easier-to-understand ways, to more substantive feedback about how the instructions were unclear.

Reading passage. The researchers noted the number of clicks students made while participating in the cognitive labs. Students were required to click back and forth between pages several times while they attempted to answer questions related to the reading passage because the questions were located on separate pages.

Box sizes. Students were also puzzled by the differences in box sizes from question to question in the drag and drop questions. They noted how some of the boxes were unnecessarily large, taking up most of the screen so that they were forced to scroll down to see the other answer choices.

“I would like the test answers to be the same size. That was confusing.”

Directions. Participants found the math directions for fill-in-the-blank questions to be difficult to follow. When asked if anything else was confusing, one student stated,

“A little bit with decimal stuff. Should [I] use a slash or space? That was a little confusing.”

Although the directions were confusing, the same student noted that she liked that there were directions on this assessment, noting how other online programs did not have enough directions, and she was unsure of what to do.

Students understood where to find the on-screen tools, such as the highlighter and calculator. However, there were no directions to help students figure out how to use them, which could be helpful for those who may be unfamiliar with online tests.

Educator Feedback

Speaking with teachers and principals assisted us in filling in gaps in information that we missed while students answered the pilot questions. As they knew their students well, they could tell us where their students had trouble even when students did not verbalize to the researchers when they struggled.

An Easy Transition for Students

Educators shared that they did not foresee too many issues for students as NCDPI transitions to new question types. As they had already participated in the NC Check-Ins, they believed their students would easily understand how to take this newly formatted assessment. One teacher explained,

“For our kids, the [new question types] were pretty easy. We are [a] 1 to 1 district. If not 1 to 1, [students] would definitely need some exposure to this beforehand through Check-Ins, whatever they do to prepare.”

Another teacher shared the importance of exposing students to similar types of questions before taking the actual assessment:

“Kids would do okay if they get some practice beforehand and have a tutorial.”

General Areas of Growth

Similar to what we found during our time with students, educators noted both logistical issues and deeper, more intrinsic issues with testing in general.

Test format and new question types. Educators pointed out the inconsistencies in the assessment's directions. They suggested making the directions more obvious for students, such as by putting them in bold print. They also advised placing directions in the same spot on each page as they were located in different spots. Consistency would help their students. Additionally, there were concerns with drag and drop items, especially for students with limited mobility.

"One struggled today, and that was the average student. Those who are below average may struggle with being able to do the drag and drop."

Mouse as a "special tool." One teacher shared that a mouse had been considered a "special tool" in other NCDPI-administered tests. They noted, however, that a mouse may be easier for some students to manipulate than a trackpad, and they hoped it would no longer be a "special tool" that required extra permissions for their students to use.

Different colored boxes. It was helpful when drag and drop answers were a different color than the destination boxes. One student used the difference in colors to help them know where to place their answers.

Drag and drop on EOG. One teacher shared her confusion with the new drag and drop item type because she said there had already been this type of question on the EOG this past school year. Her student asked her questions about it during the EOG, but as she was forbidden to answer the question, she wanted to know more about why this question type had already been included.

Math-Specific Issues

Fractions. Educators echoed what their students shared about keying in the mixed numbers and improper fractions during the math test. As one teacher explained:

"In class we put [it] in [the] simplest form, and the test wants an improper fraction. That contradicts standards."

Reset button. One teacher indicated that keying in the fraction would even be confusing for an adult because the "reset" button looked like a "back" button.

Multiple correct answers. One area where it was obvious that students struggled or were not paying attention was in the questions that asked them to provide multiple answers. While the NC Check-Ins only used multiple choice questions in which only one correct answer was possible, some of the new pilot questions asked students to select multiple answers. Students oftentimes ignored these directions or may not have realized they could select more than one answer.

"If [students] don't notice that it says expressions [with an s], they may not get that there are multiple to look for."

Abbreviations. Finally, educators said that abbreviations should be written out for students as they may be unaware of what KG and G mean.

Other Feedback

Testing equity. Research has shown that standardized testing disadvantages students from minority groups. One teacher shared that she hoped this would be considered as the NC Interims are developed and rolled out to all students in North Carolina.

Other software. To glean whether these proposed item types would be completely new for students, we asked educators what other software programs they used in their schools. While not all schools incorporated other software programs, the following is a list that pilot schools used: iReady, iStation, Gradelevels, A to Z, Readworks, NearPod (for dragging and dropping technology), SchoolNet, IXL, Mastery Connect, Kami, Canvas, and Peardeck.

Item-Specific Feedback

In this section, we detail notes on specific items where students had difficulties, misunderstandings, or provided actionable feedback. It is broken down by subject area and grade level.

English Language Arts

Grade Level	Question Number	Feedback and Notes
4	1	Difficulty reading/pronouncing “occupied”
4	1	Took student a very long time, and she indicated this was a difficult question
4	2	Student asked if he could click back to the reading passage
4	2	Student noted it took her a minute to drag and drop
4	3	When the internet went down during her test, her answer selection changed
4	4	Student struggled reading the word “healthier” (EC student)
4	4	One teacher noted that on the fourth-grade test, question four was confusing even for her because of the layout of the directions and the question
4	5	Understood the question but the layout of the answers was confusing as the answer choices did

		not look like four different options
4	5	Layout of answers different from other question as the choices were in rows instead of a 2x2 grid; struggled with the word “prepare”; had an easier time dragging and dropping because there was less space to drag the selection across the screen than on the previous question (EC student)
4	5	Answer boxes are extremely large for the amount of text in them, and students may not know to scroll down for more answers
4	6	Student struggled to read the words “young” and “herbs” (EC student)
4	7	The directions are unclear, and students would have a difficult time knowing what to do
5	1	Student indicates he hasn’t seen a question like this before (EC student)
5	1	Student unsure if he should circle the answer or click on it to select it
5	2	Student struggled to drag and drop because he ran out of room on his trackpad (EC student)
5	2	Teachers worried about this question as it appeared to test multiple standards
5	4	The teacher stated, “Not sure [if] there’s supposed to be one answer or two.” Then the teacher continues to explain, “It [is] labeled ‘1’ and the ‘1’ is below the box, not in the box. The number is closer to the answer choices than the question, and that was keeping [the student] from understanding what to do.”

Mathematics

Grade Level	Question Number	Feedback and Notes
3	2	Student struggled because she had not learned this yet, and the teacher noted that she was unsure if this was a third grade standard and should be checked
3	3	Student had trouble with clicking on this one; student has otherwise been very fast and has understood most of the directions so far
3	5	Student scrolled up and down on the clocks many times but said the question was easy

4	1	Thought it was a drag and drop but when she clicked on the answer, it went right to the box
4	2	Student asks if he can drag an incorrect answer out of the box
4	2	Teacher/test administrator noted the word “place” in the directions may have been unnecessary
4	3	Topic is difficult; student was taken out of class to do the cognitive lab while he was learning about mixed numbers, so we skipped that one
4	3	The subject matter of the question was difficult, but the student was also unsure if she typed in her answer correctly, stating, “I hope they get what that means,” we think in reference to her use of a decimal point
4	3	Difficulty with correct notation/typing in the correct math symbols; students taught to answer questions in mixed number format, so she struggled to type answer as a mixed number and did not key in answer as an improper fraction; directions were at the bottom of the page leading to confusion
4	4	Student confused because there was no box around the number and she didn’t know where to click
4	5	Struggled with the actual math; it would be easier to have three answers and not five; teacher/test administrator noted this question is tricky
4	6	Students are taught to reduce and simplify in school, and this question does not have them do that; instructions that include “improper fractions or decimals” may mislead students into thinking their answer should be a fraction or a decimal even when it should be a whole number
5	1	Student had trouble reading the word “value”
5	2	Student noted, “This one is really hard. It has fractions and symbols, then the answers are numbers,” and “the calculator gave me a fraction, and it was improper, and I think when you do that based on the numbers, it will be the answer. I’m just gonna put what I think because I’m not sure. I haven’t learned this yet.”
5	2	Teacher noted there were multiple standards within one question and students have to convert in multiple places; question uses abbreviations (e.g. kg instead of kilograms), which could lead to confusion; student had trouble clicking this (double clicked so answer unselected)

5	5	Student took multiple attempts to drag and drop; answer choices were not all on the screen and student had to scroll; difficulty changing answer choice but managed after multiple attempts
5	6	Student didn't answer this question, yet the report has an asterisk indicating she did



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Friday Institute for Educational Innovation

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Exhibit IV-17 Grade 7 Mathematics Interim Test Specifications Results

Grade 7 Mathematics

21 responses

[Publish analytics](#)

Your name

21 responses

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

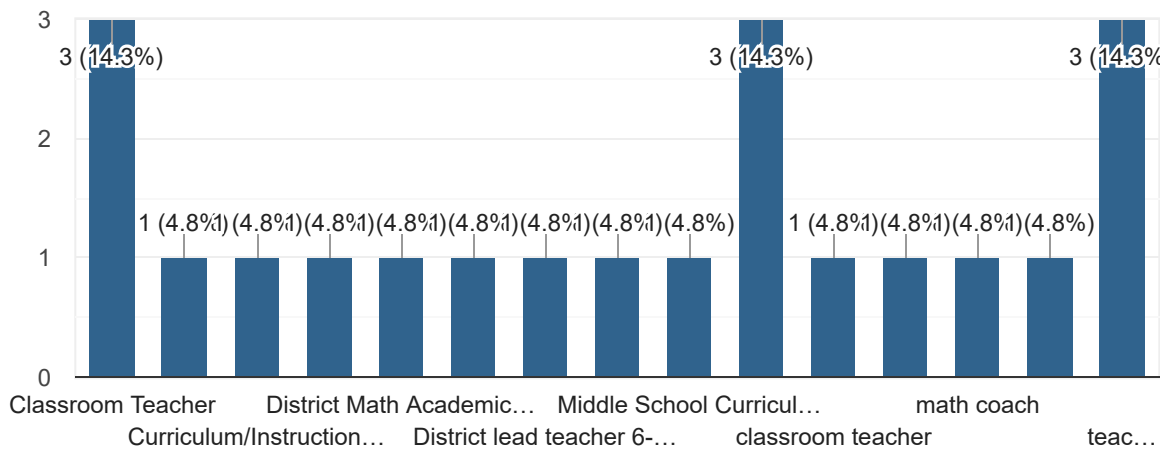
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[REDACTED]



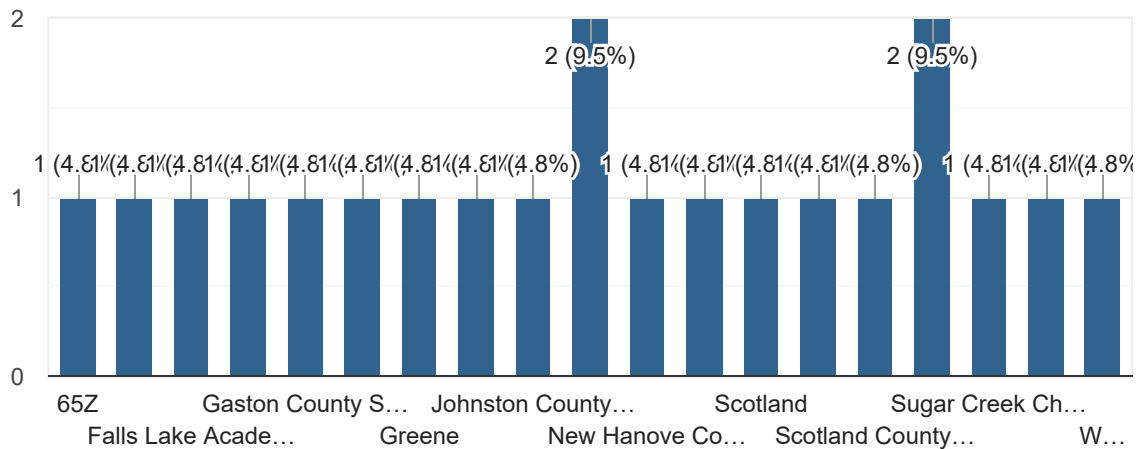
Your role (i.e. classroom teacher, math coach, district leader, etc.)

21 responses



Your public school unit

21 responses



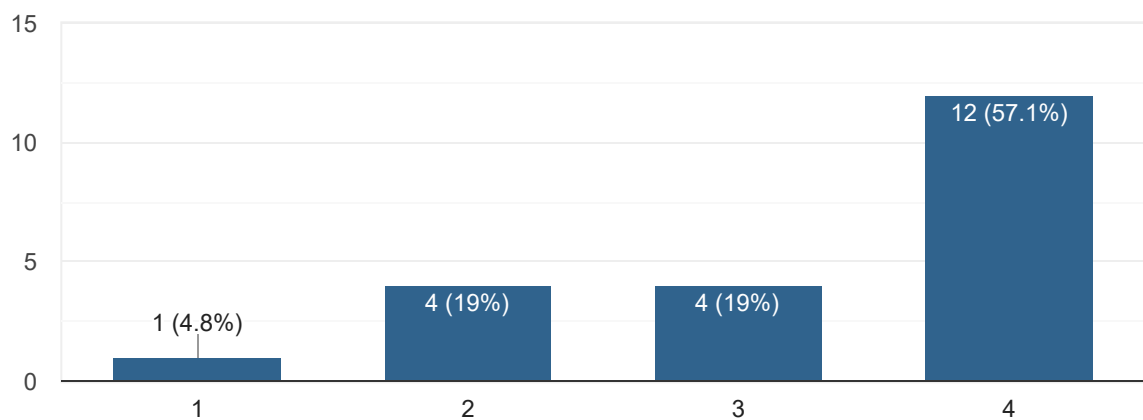
Ratio and Proportional Relationships

NC.7.RP.1: Compute unit rates associated with ratios of fractions to solve real-world and mathematical problems.



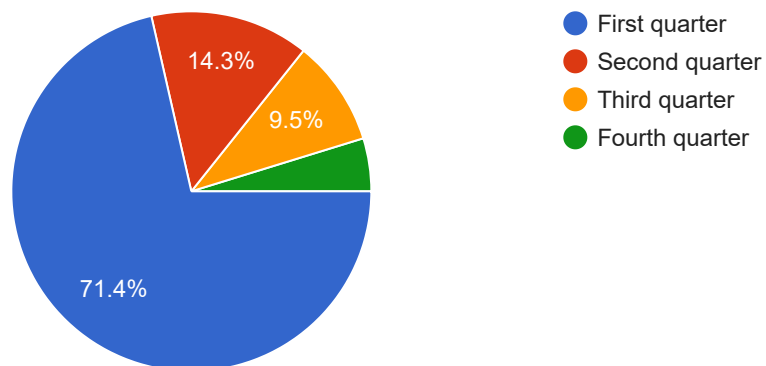
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses

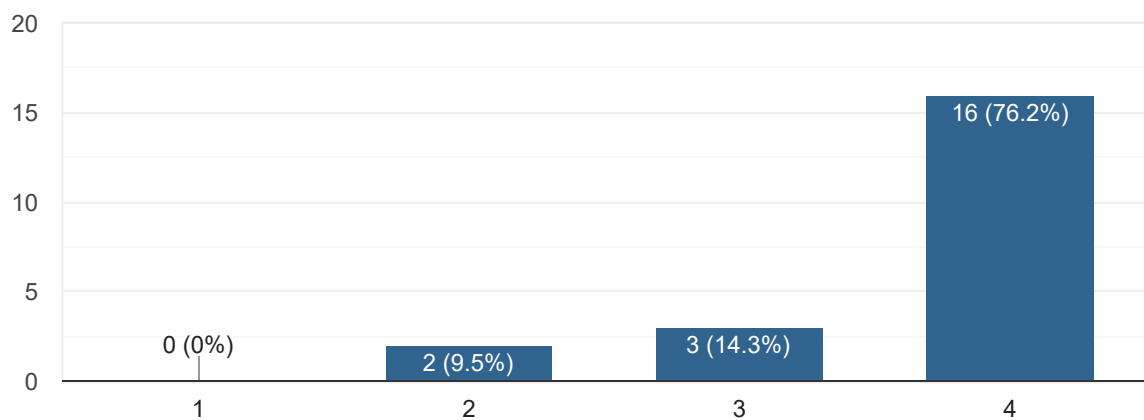


NC.7.RP.2: Recognize and represent proportional relationships between quantities.



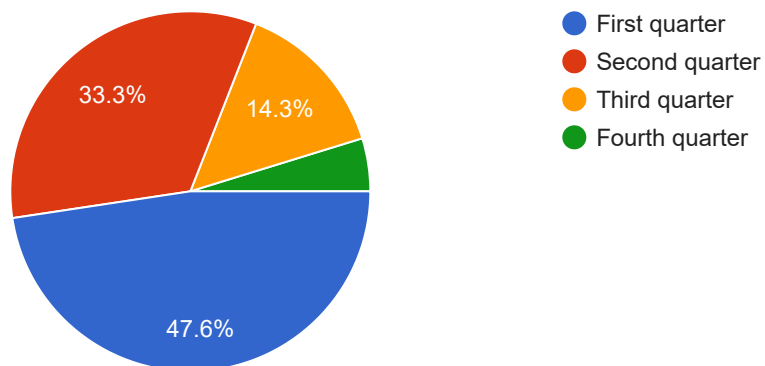
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses

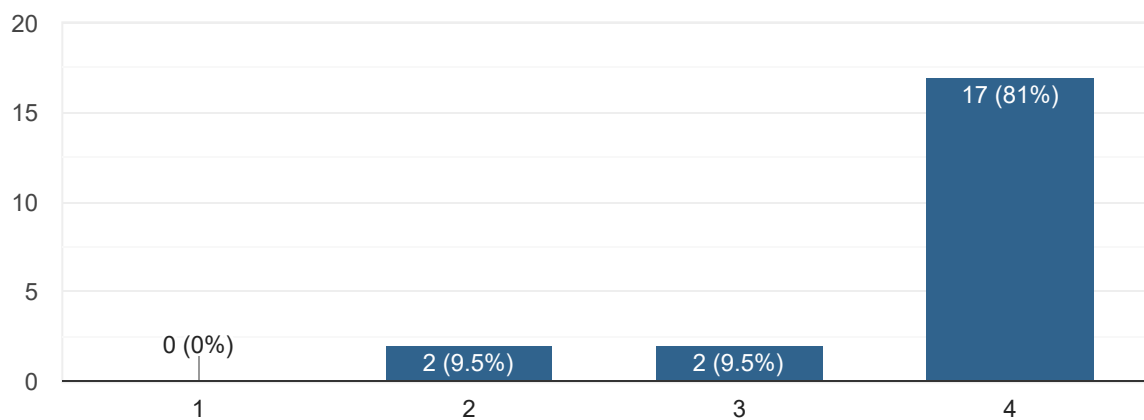


NC.7.RP.3: Use scale factors and unit rates in proportional relationships to solve ratio and percent problems.



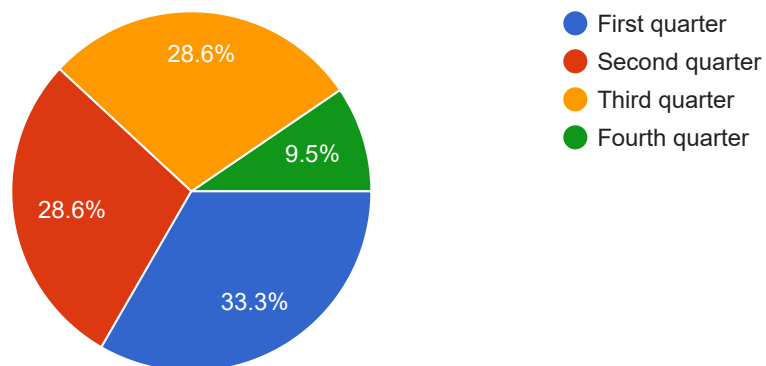
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses



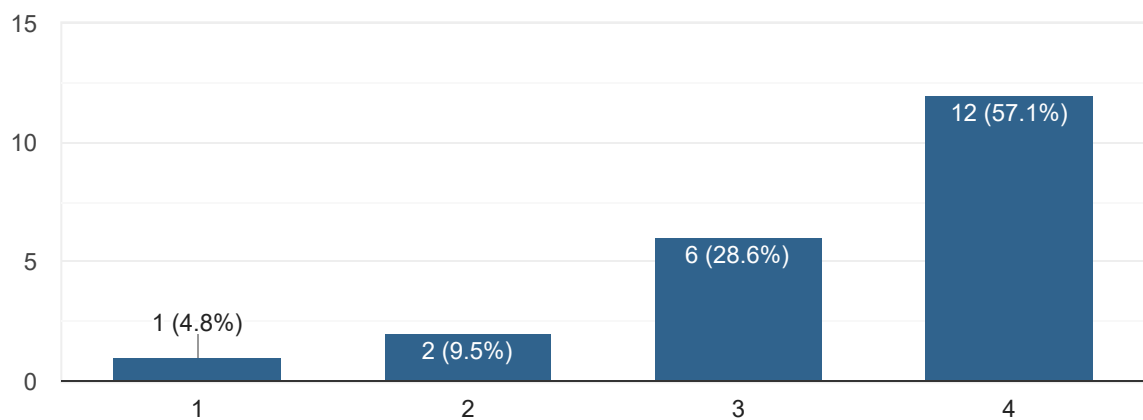
The Number System

NC.7.NS.1: Apply and extend previous understandings of addition and subtraction to add and subtract rational numbers, using the properties of operations, and describing real-world contexts using sums and differences.



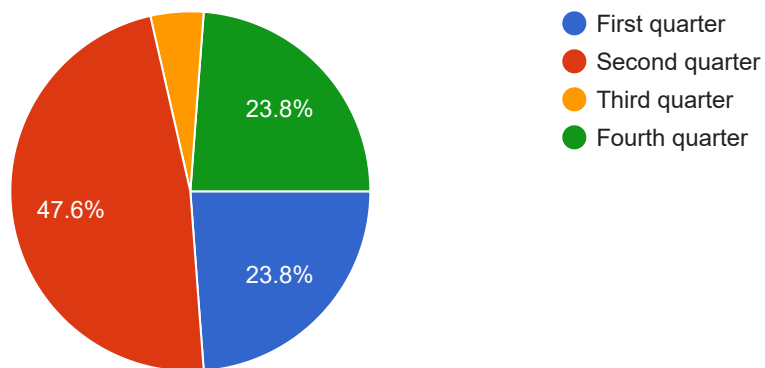
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses

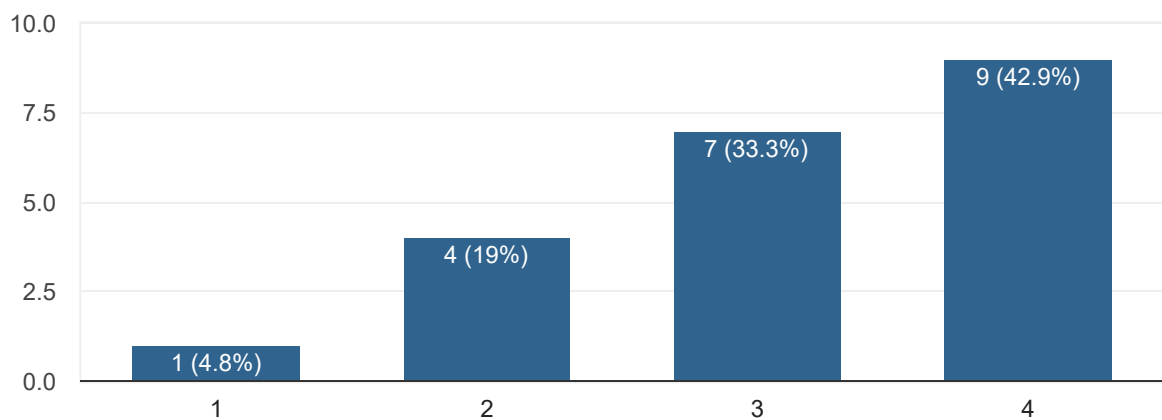


NC.7.NS.2: Apply and extend previous understandings of multiplication and division.



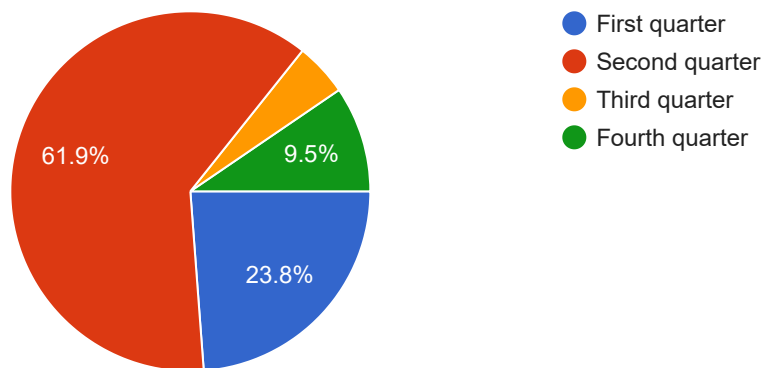
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses

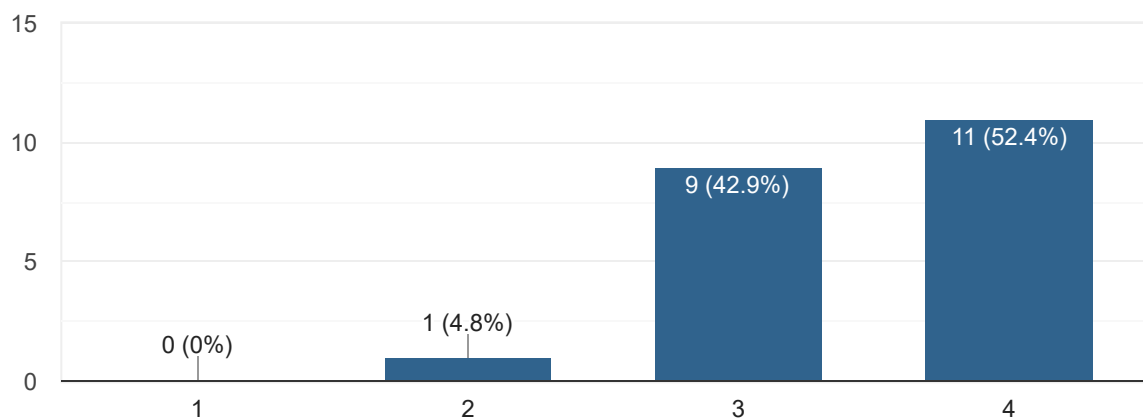


NC.7.NS.3: Solve real-world and mathematical problems involving numerical expressions with rational numbers using the four operations.



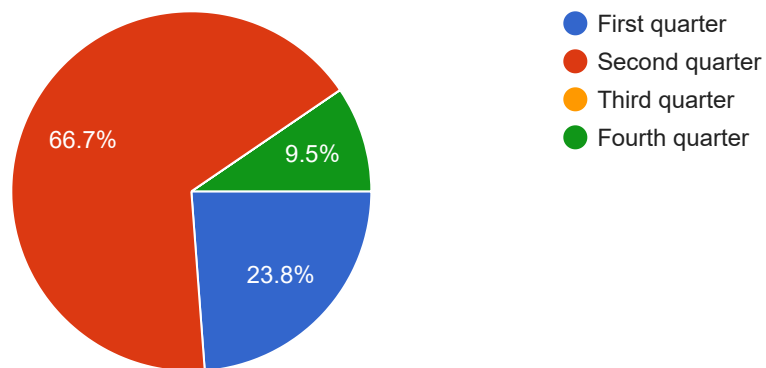
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses



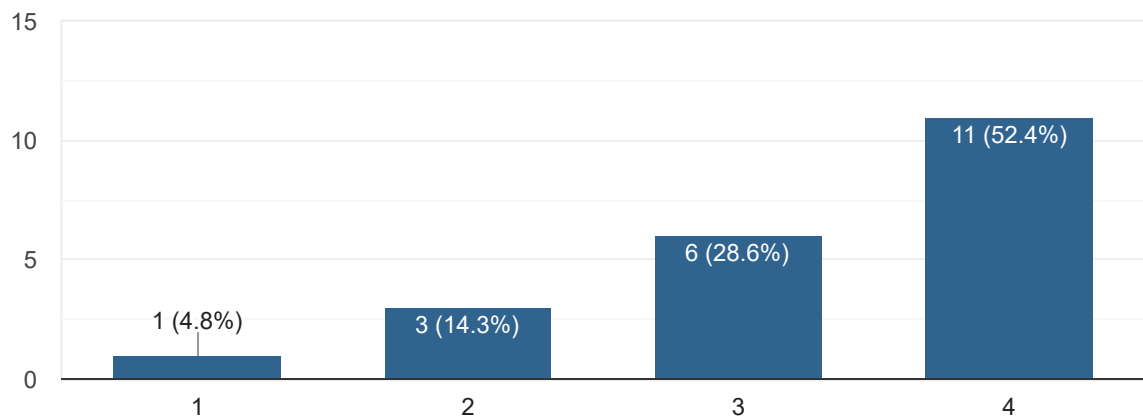
Expressions and Equations

NC.7.EE.1: Apply properties of operations as strategies to:



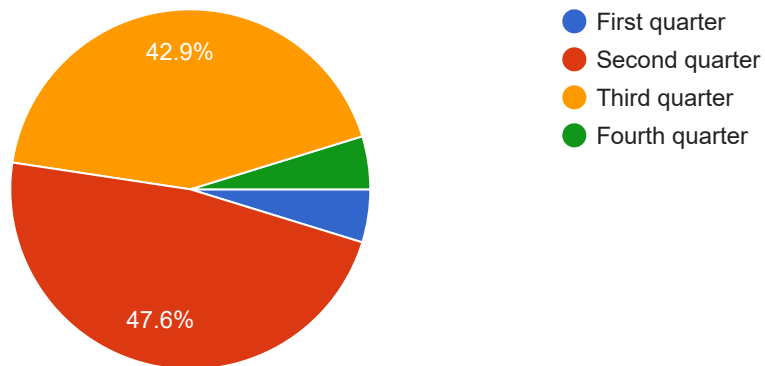
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



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21 responses

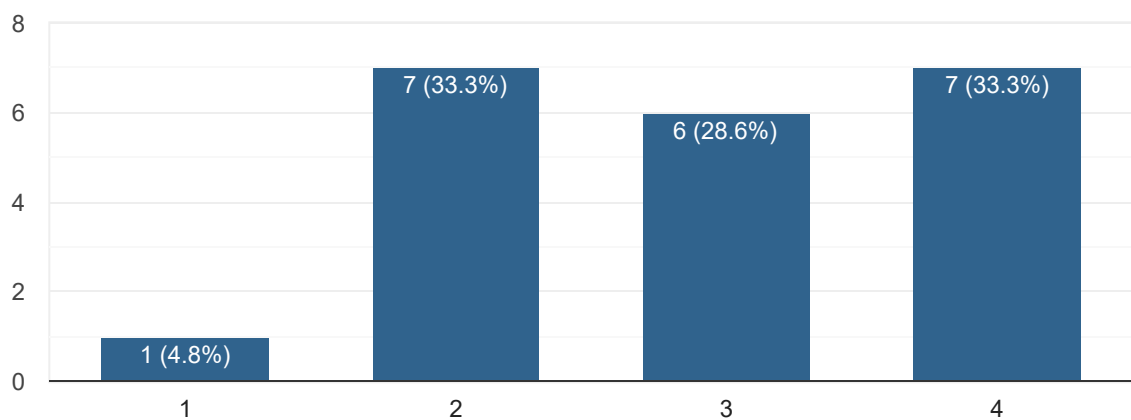


NC.7.EE.2: Understand that equivalent expressions can reveal real-world and mathematical relationships. Interpret the meaning of the parts of each expression in context.



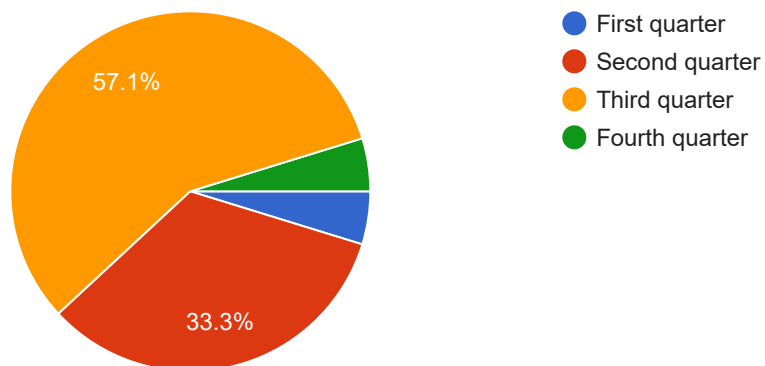
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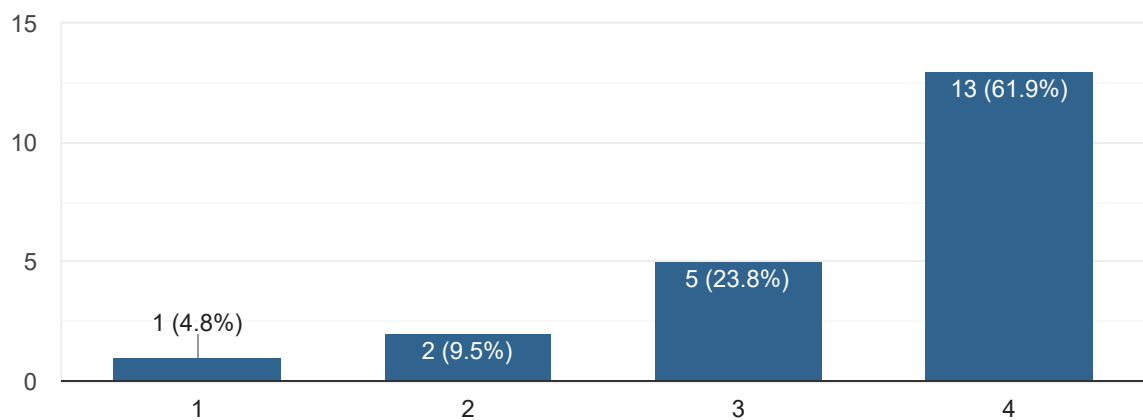


NC.7.EE.3: Solve multi-step real-world and mathematical problems posed with rational numbers in algebraic expressions.



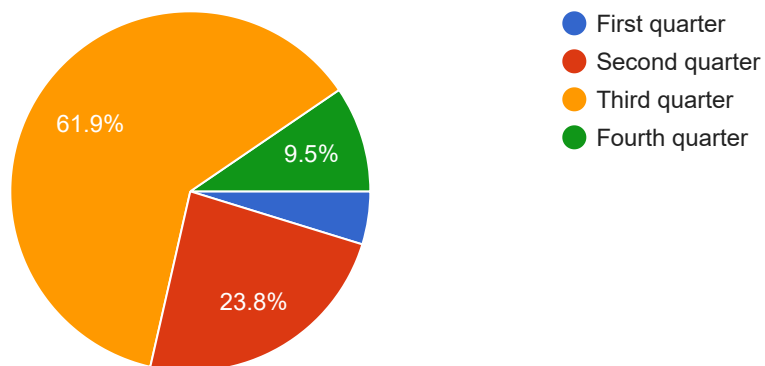
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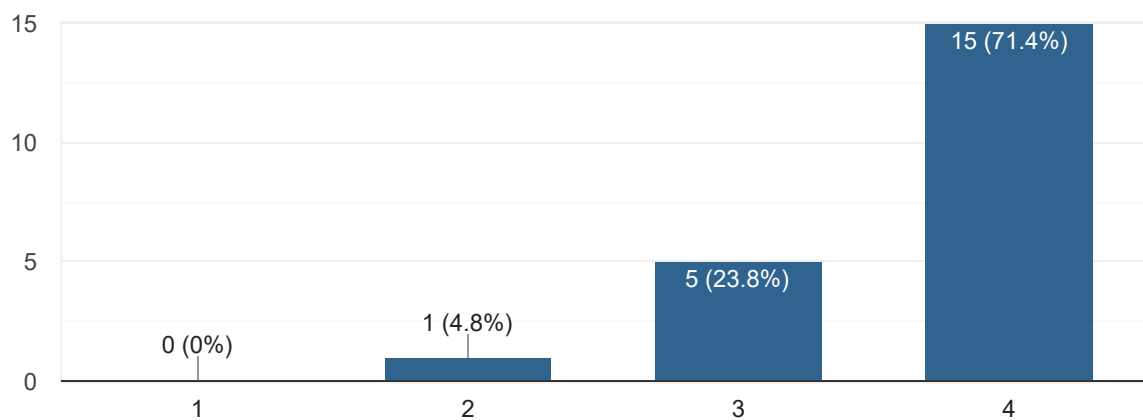


NC.7.EE.4: Use variables to represent quantities to solve real-world or mathematical problems.



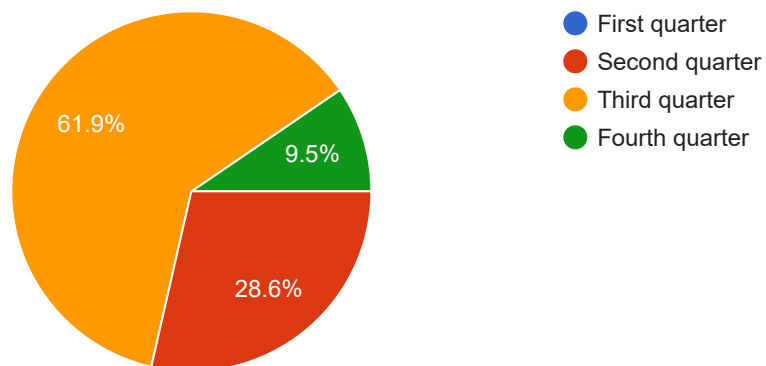
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



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21 responses



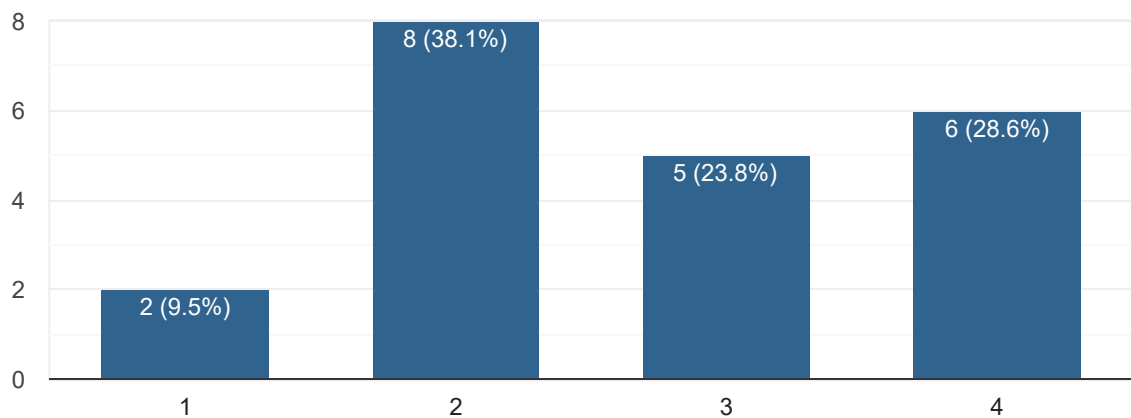
Geometry

NC.7.G.1: Solve problems involving scale drawings of geometric figures by:



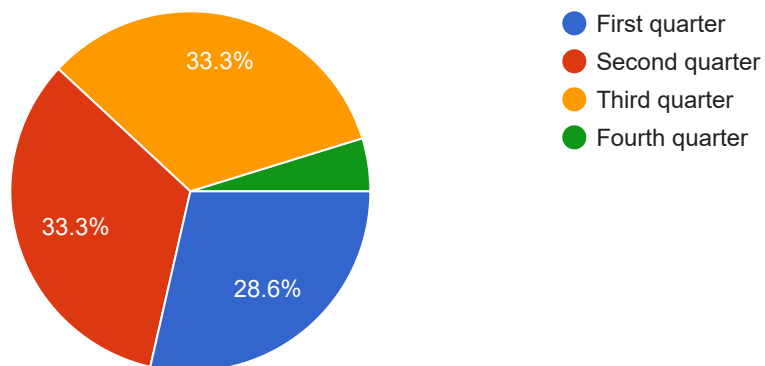
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses

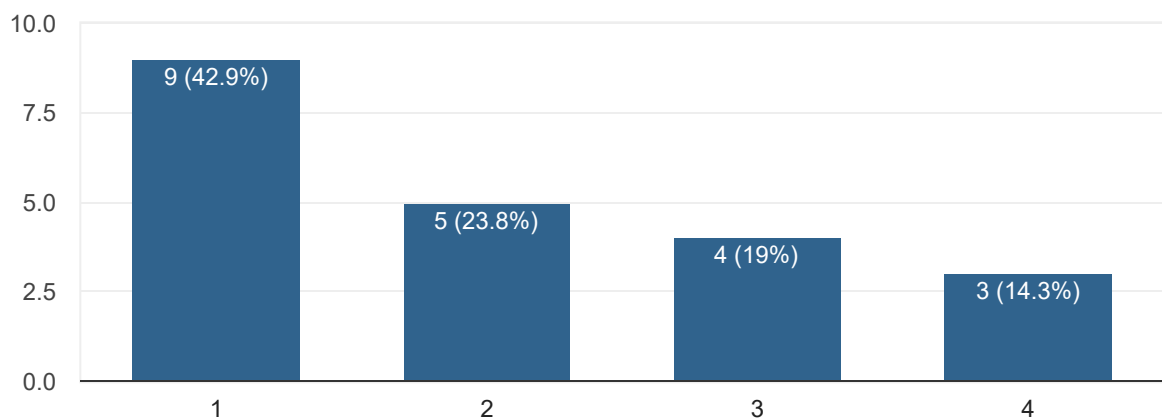


NC.7.G.2: Understand the characteristics of angles and side lengths that create a unique triangle, more than one triangle or no triangle. Build triangles from three measures of angles and/or sides.



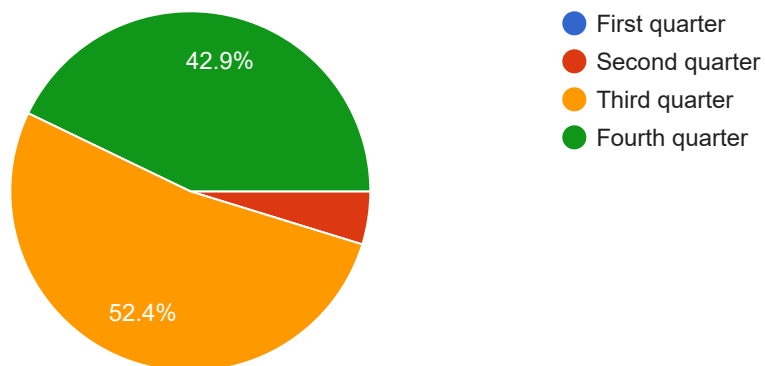
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



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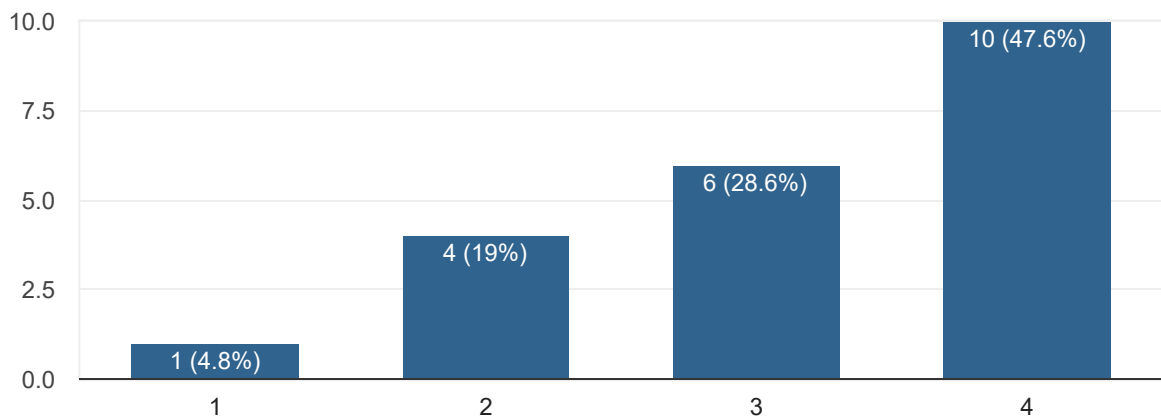


NC.7.G.4: Understand area and circumference of a circle.



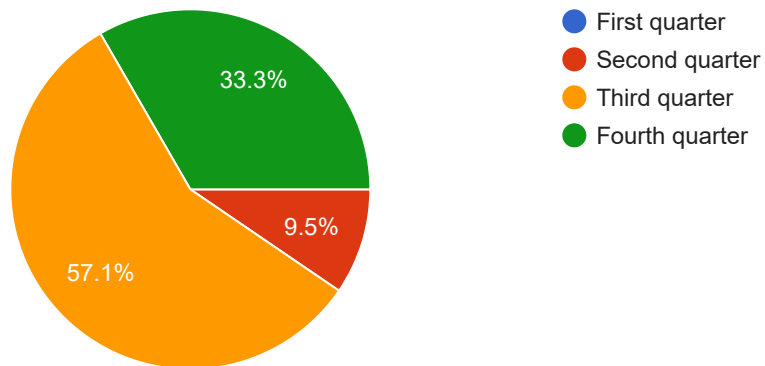
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



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21 responses

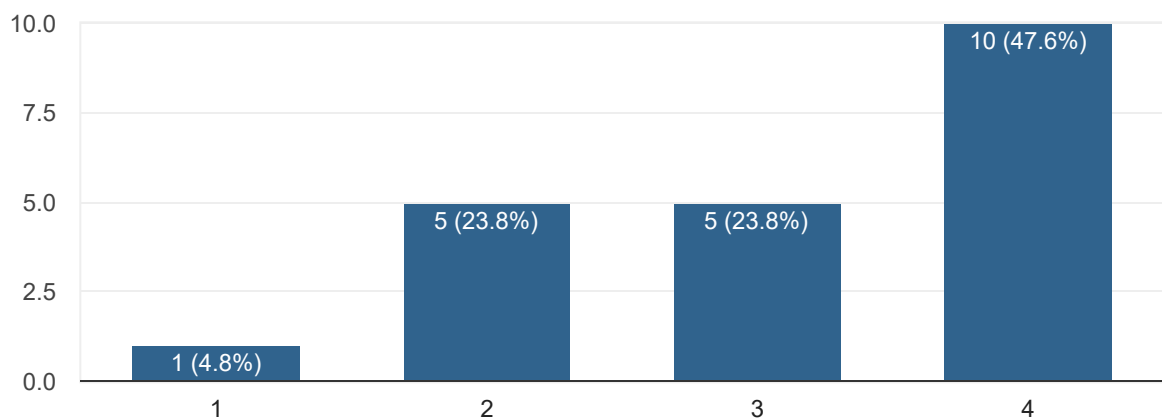


NC.7.G.5: Use facts about supplementary, complementary, vertical, and adjacent angles in a multi-step problem to write and solve equations for an unknown angle in a figure.



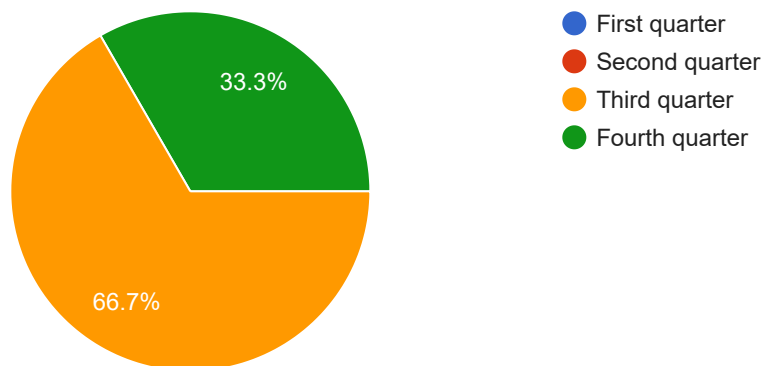
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21 responses



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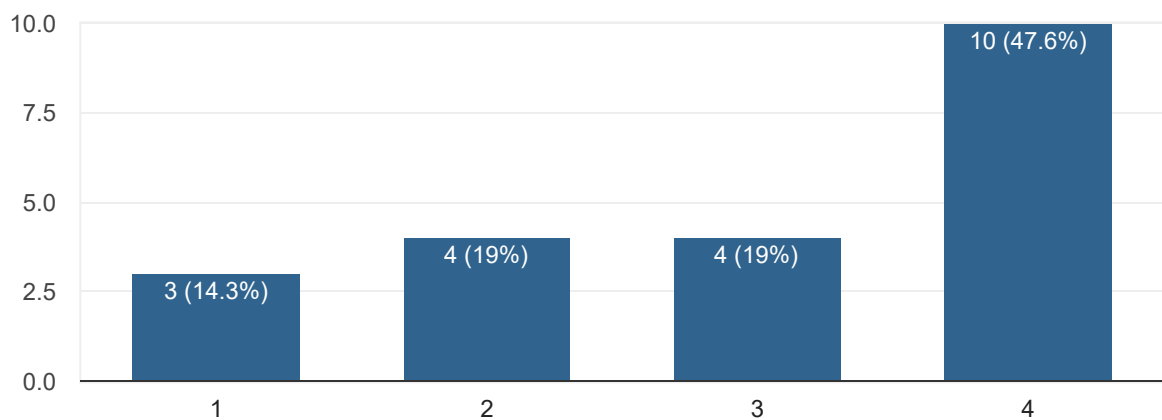


NC.7.G.6: Solve real-world and mathematical problems involving:



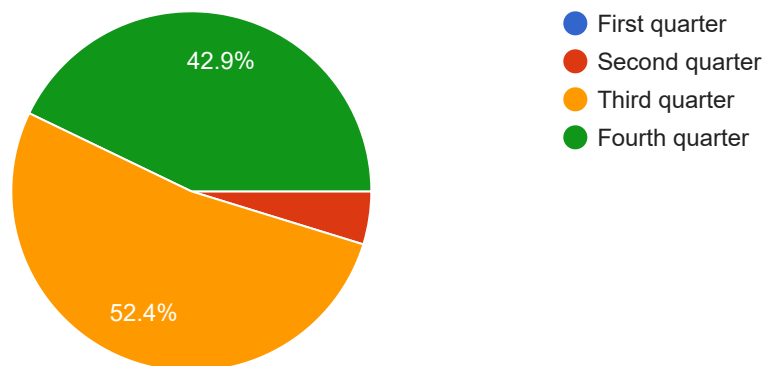
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21 responses



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21 responses



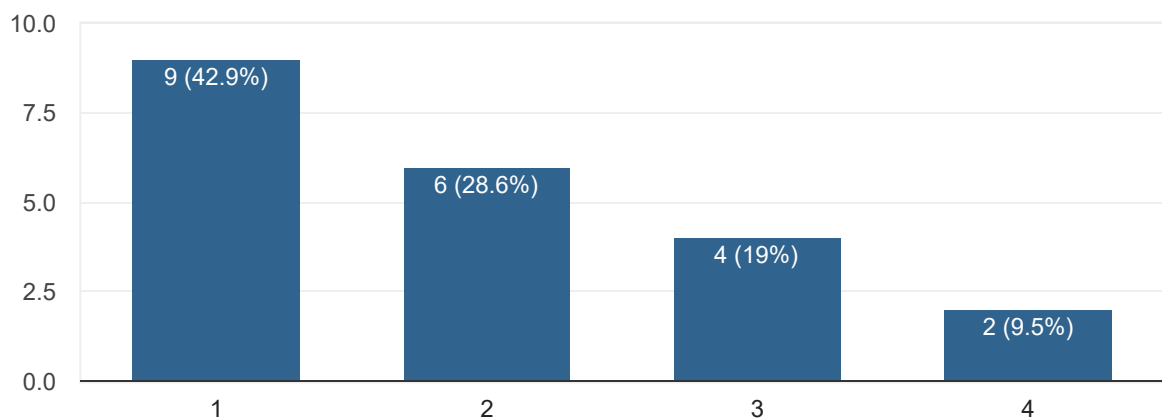
Statistics and Probability

NC.7.SP.1: Understand that statistics can be used to gain information about a population by:



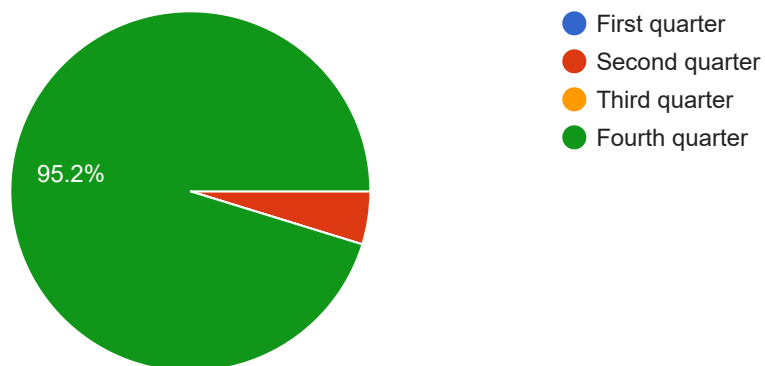
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21 responses



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21 responses

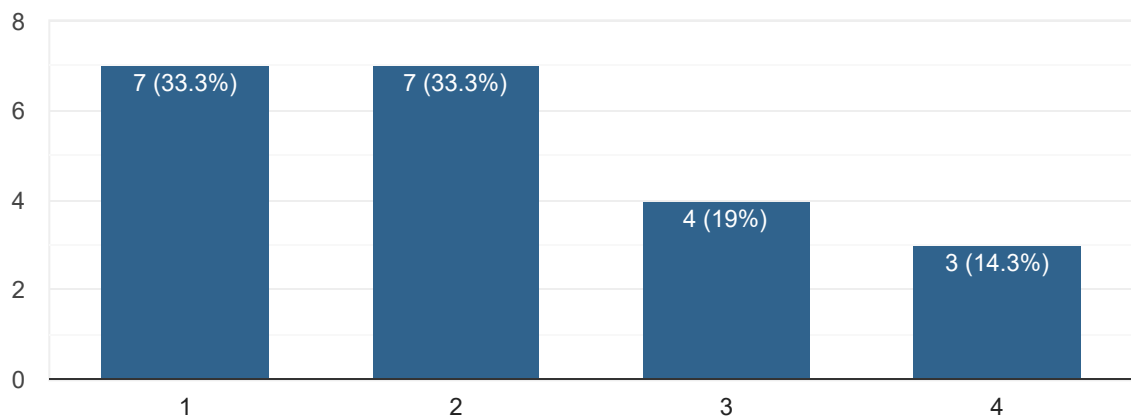


NC.7.SP.2: Generate multiple random samples (or simulated samples) of the same size to gauge the variation in estimates or predictions, and use this data to draw inferences about a population with an unknown characteristic of interest.



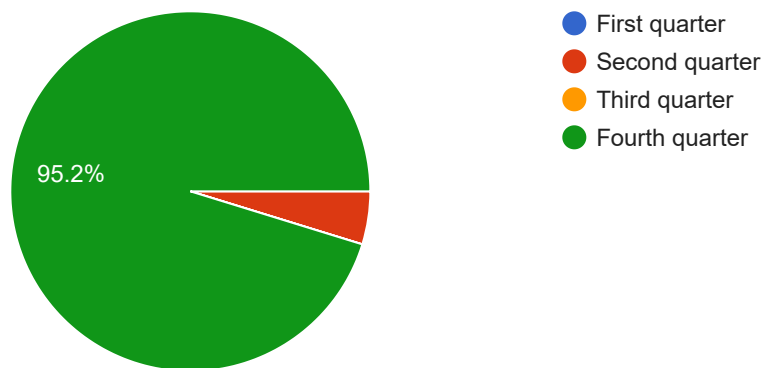
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses

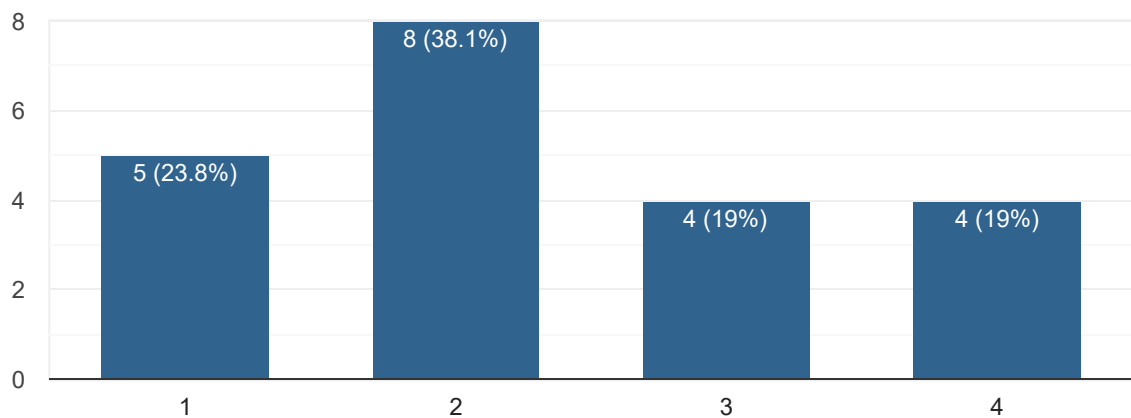


NC.7.SP.3: Recognize the role of variability when comparing two populations.



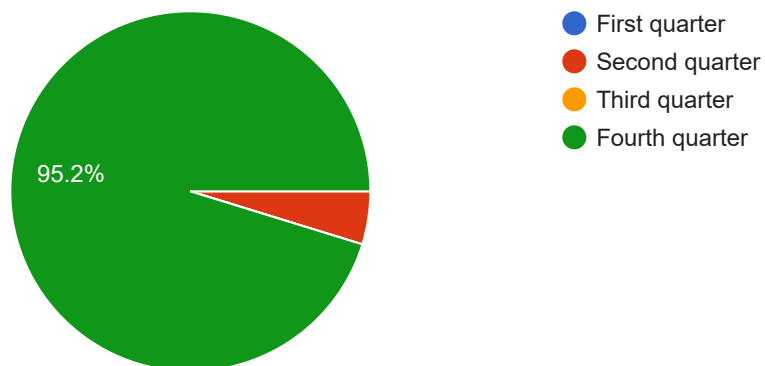
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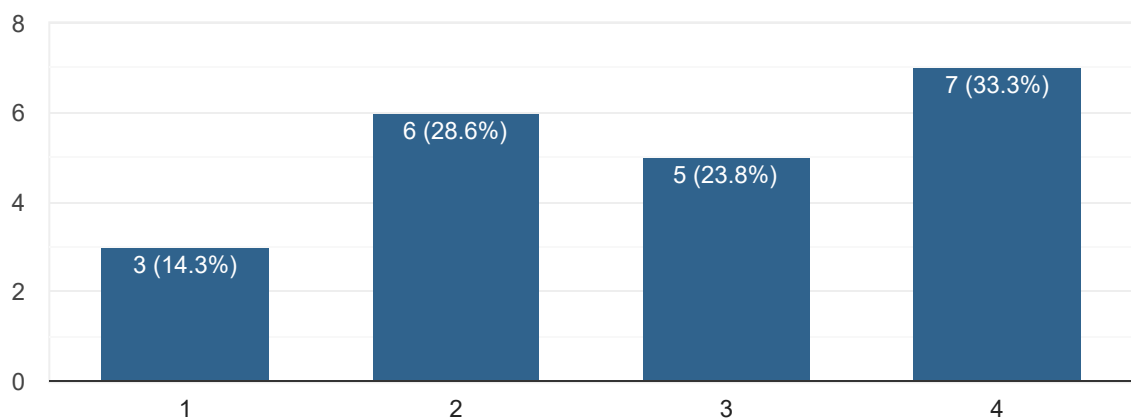


NC.7.SP.4: Use measures of center and measures of variability for numerical data from random samples to draw comparative inferences about two populations.



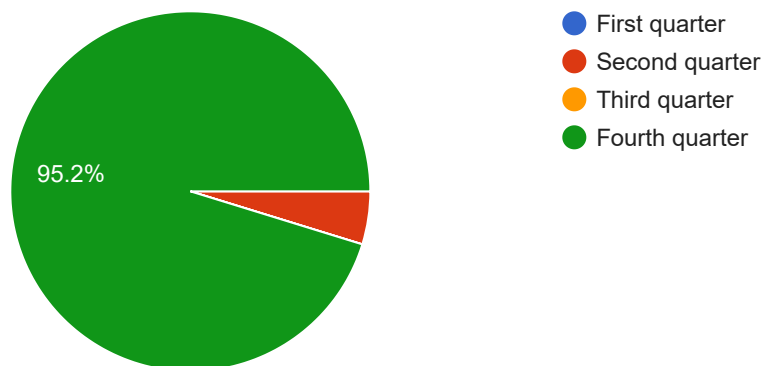
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21 responses



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21 responses

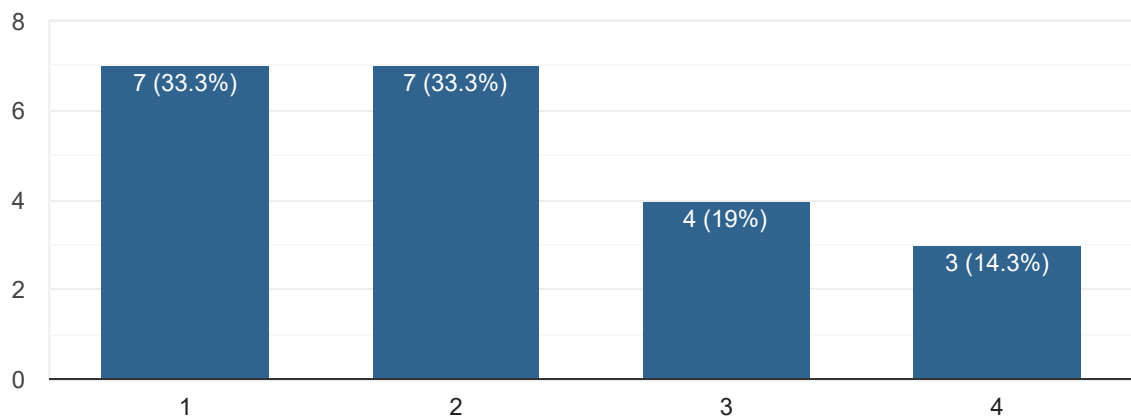


NC.7.SP.5: Understand that the probability of a chance event is a number between 0 and 1 that expresses the likelihood of the event occurring.



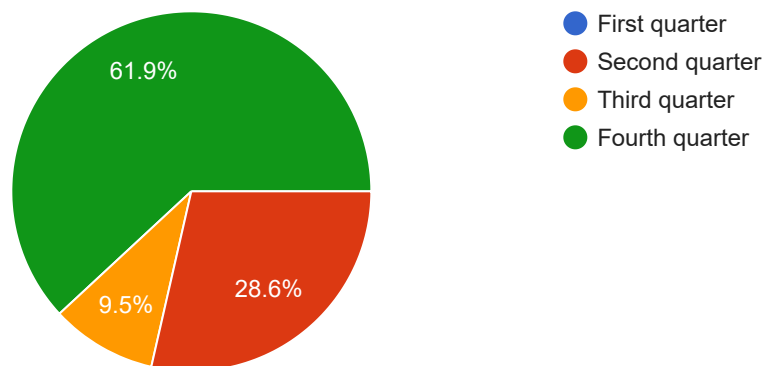
On a scale of 1 to 4, how important is it for TEACHERS to receive formative feedback for this standard?

21 responses



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21 responses

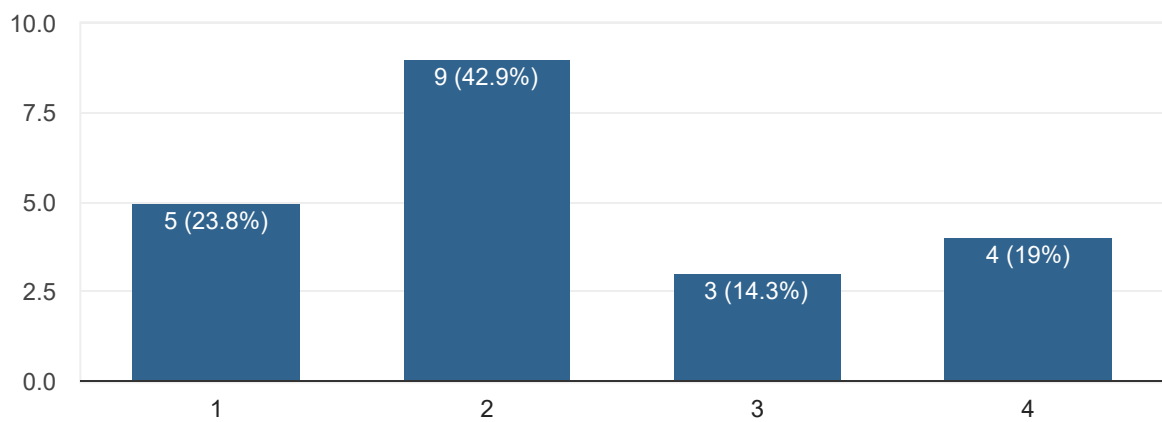


NC.7.SP.6: Collect data to calculate the experimental probability of a chance event, observing its long-run relative frequency. Use this experimental probability to predict the approximate relative frequency.



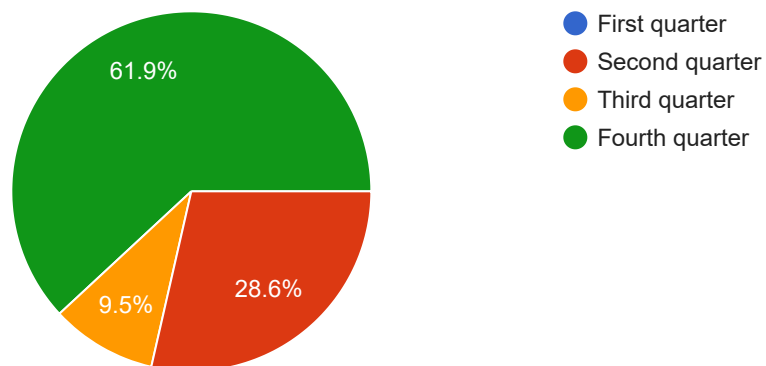
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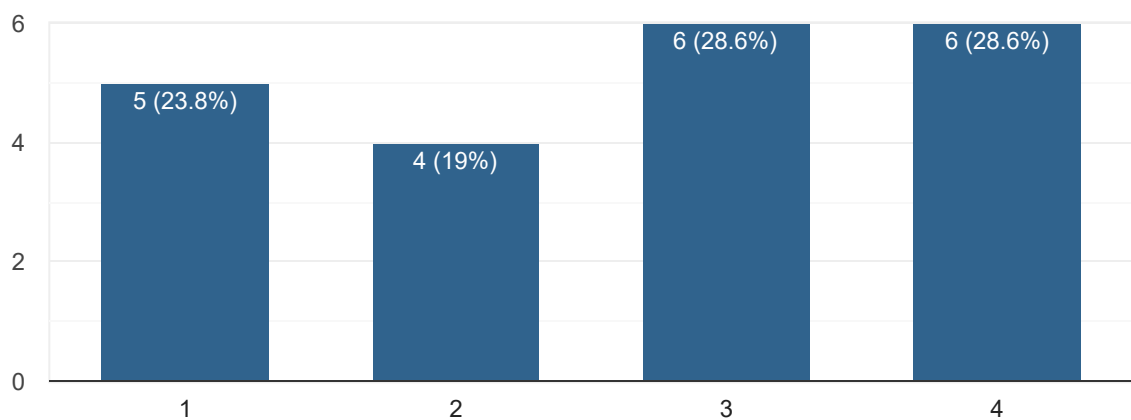


NC.7.SP.7: Develop a probability model and use it to find probabilities of simple events.



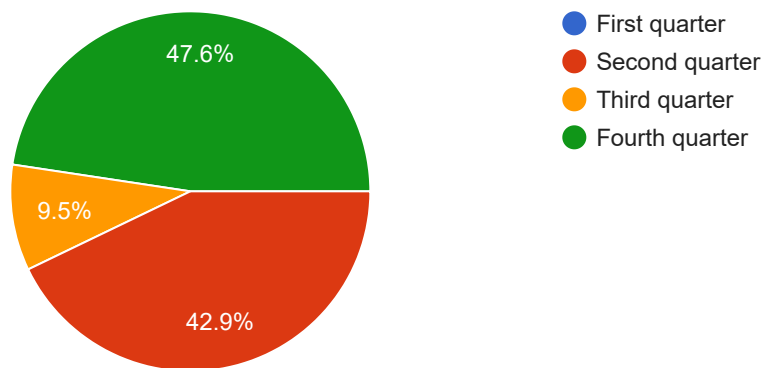
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21 responses



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21 responses

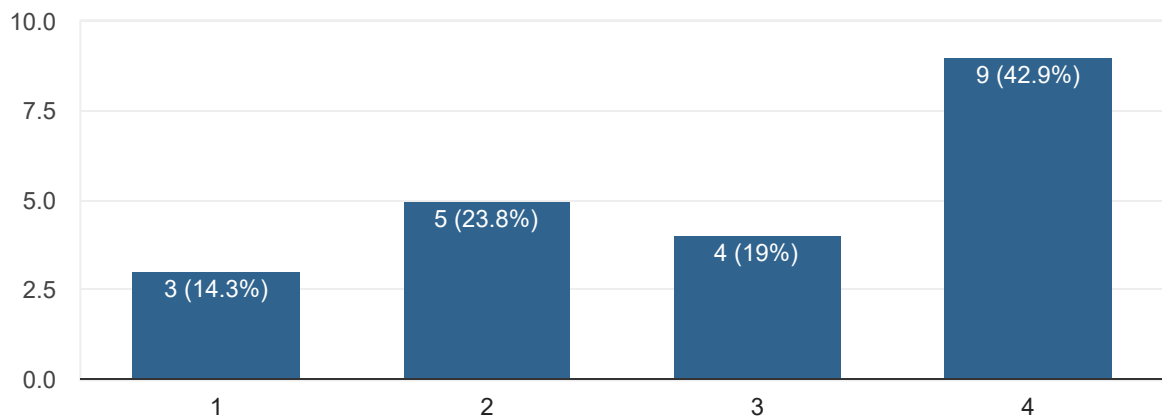


NC.7.SP.8: Determine probabilities of compound events using organized lists, tables, tree diagrams, and simulation.



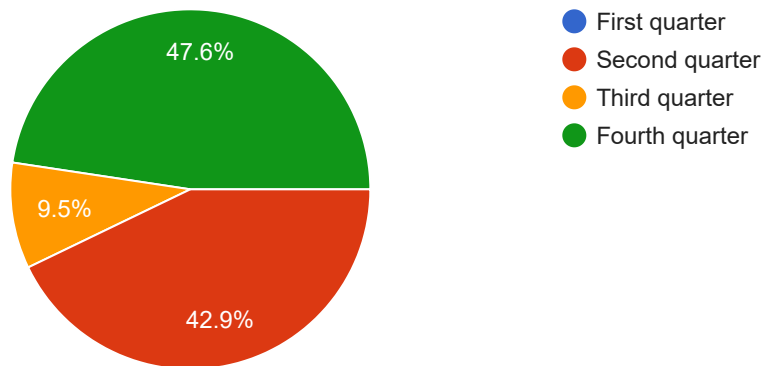
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21 responses



During which quarter do you COMPLETELY finish teaching this standard?

21 responses



Thank you for your feedback!

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Exhibit IV-18 IADA Grades 4 and 7 Mathematics Interim Assessment Test
Specifications

Innovative Assessment Demonstration Authority (IADA) Grades 4 and 7 Mathematics Interim Assessment Test Specifications North Carolina Personalized Assessment Tool

Purpose and Overview

The North Carolina Personalized Assessment Tool is a system of through-course assessment opportunities aimed toward a balanced assessment system that will provide granular data for immediate feedback about students' performance throughout the year. The system is currently being developed as a pilot under the U.S. Department of Education's Innovative Assessment Demonstration Authority (IADA) and includes both interim and summative assessments.

The current design purposes of the North Carolina Personalized Assessment Tool are to

- provide educators, students, and stakeholders with immediate and detailed feedback on student performance on grade-level-specific content standards so classroom instruction may be tailored to an individual student's needs;
- provide a progress indicator for each interim on individual student performance in relation to overall grade-level performance expectation; and
- provide a reliable estimate to inform a student's starting point on the multistage adaptive summative assessment that will be used to determine an academic achievement level and for state and federal accountability.

Content Specifications

Grade 4: The North Carolina Department of Public Instruction (NCDPI) Accountability Services/Test Development Section facilitated a test specification workshop as part of the process to gather input from relevant stakeholders. The goal of the test specification workshop was to gain input from teachers and curriculum specialists across the state to guide recommended groupings of grade 4 mathematics content standards for the various Personalized Assessment Tool interims. Participants at the workshop reviewed all fourth-grade mathematics content standards, then prioritized and grouped them into three main categories based on their local curriculum preferences. The proposed content specification for the Personalized Assessment Tool grade 4 mathematics interims are shown in Table 1. Following the test specification workshop, the NCDPI Test Development staff reviewed and summarized panelist recommendations to ensure alignment with other technical design specifications.

Grade 7: As a result of restrictions associated with COVID-19, the NCDPI Accountability Services/Test Development Section was unable to facilitate an in-person test specification workshop to gather input from relevant stakeholders. Instead, a series of surveys was utilized to gather input from IADA program participants across the state. The goal of the test specification surveys was to gain input from teachers and curriculum specialists to guide recommended groupings of grade 7 mathematics content standards for the various Personalized Assessment Tool interims. Participants were asked to review all seventh-grade mathematics content standards and then prioritize them based on their local curriculum preferences. This feedback was used to create proposed content standard groupings for the Personalized Assessment Tool grade 7

mathematics interims. A follow-up survey was utilized to share the proposed content standard groupings with teachers and curriculum specialists to gauge how well the proposed groupings fit their formative assessment data needs. Results from that survey were used to confirm the testing specifications, as seen in Table 2. Finally, the NCDPI Test Development staff reviewed and summarized panelist recommendations to ensure alignment with other technical design specifications.

Throughout this pilot phase, NCDPI intends to collect feedback with the goal of adjusting the content specification of NCPAT interims. It is possible that standards listed under each interim may change before the pilot is finalized.

Table 1. Content Specifications NCPAT Math Grade 4

Grade 4 Mathematics North Carolina Personalized Assessment Tool Interim Assessed Standards		
Interim 1	Interim 2	Interim 3
4.OA.1	4.OA.3	4.NBT.5
4.NBT.2	4.NBT.5	4.NF.3
4.NBT.4	4.NBT.6	4.NF.4
4.NBT.7	4.NF.1	4.NF.6
4.G.1 and 4.MD.3	4.NF.2	4.NF.7
		4.G.2 and 4.MD.4

Table 2. Content Specifications NCPAT Math Grade 7

Grade 7 Mathematics North Carolina Personalized Assessment Tool Interim Assessed Standards		
Interim 1	Interim 2	Interim 3
7.G.1	7.EE.1	7.EE.4
7.NS.3	7.EE.3	7.G.5
7.RP.1	7.EE.4	7.G.6
7.RP.2	7.NS.3	7.SP.7
7.RP.3	7.RP.3	7.SP.8

Interim Format

The NC Personalized Assessment Tool interims are currently being developed as online, fixed-form assessments with twenty-five total items each. Each of the three mathematics interims will include four-option multiple-choice items, open-ended numeric response items, and technology-enhanced items. The grades 4 and 7 mathematics interims will have calculator inactive and calculator active sections.

Administration and Review

The NCDPI will offer a flexible administration and review window for all mathematics interims to accommodate local control of the curriculum. The window for all mathematics interims will open October 1 and close at the end of May. Public school units may choose to administer interims in the order that best aligns with their curriculum. The NCDPI recommends one interim administration per quarter. Proctors are not recommended for the administration of interims. The interims are not timed assessments; however, the estimated time for most students to complete a twenty-five-item interim is about ninety minutes. Schools have the option to administer the interims in one school day or over multiple school days. For multiple school days, the total administration time can be divided into minisessions.

The interim item review window for teachers will also be available from October 1 to the end of May. Like NC Check-Ins, teachers may access interim forms after administration so they can conduct formative reviews with their students. The main purpose of these interims is to provide reliable formative data on grade-level-specific content standards so teachers may adjust instruction. Previewing or disclosing interim content to students before an administration may result in an invalid interpretation about student performance on grade-level-specific content standards.

IADA Pilot 2021–22

During the 2021–22 school year, the IADA will consist of only three interims that will be used to provide educators, students, and stakeholders with immediate and detailed feedback on student performance on grade-level-specific content standards so that classroom instruction may be tailored to an individual student's needs.

The multistaged adaptive summative assessment for IADA will be administered in the 2022–23 school year. Students will need to complete at least two interims by April 15, 2023, otherwise data from their interims will not be used to inform the multistage adaptive summative.

Exhibit IV-19 March 1, 2021 Webinar

NC Personalized Assessment Tool Pilot Update

**The North Carolina Department of Public Instruction
The Friday Institute for Educational Innovation**

March 1, 2021

Welcome and Introduction

NCDPI Accountability Services

Tammy Howard, Ph.D.

Director of Accountability Services

Maxey Moore

Section Chief, Test Development

Stephanie Boyd

Education Consultant

The Friday Institute for Educational Innovation

Dr. Shaun Kellogg

Director of Research and Evaluation

Emmy Coleman

Senior Research Scholar



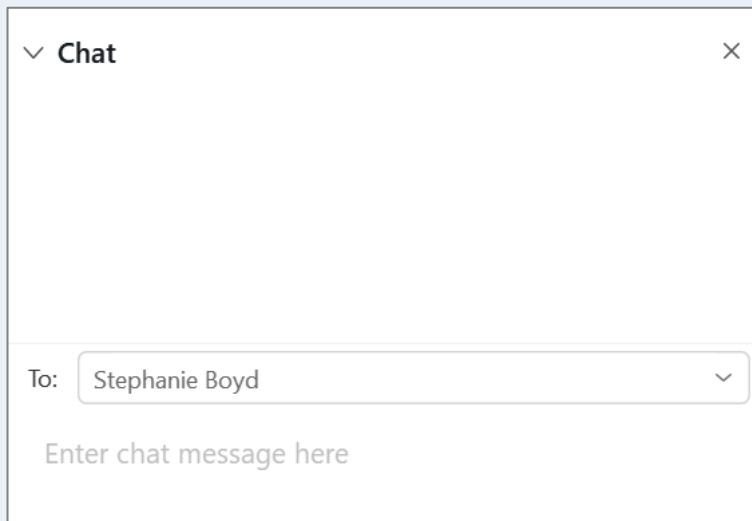
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- Everyone is defaulted to mute due to the size of this webinar.

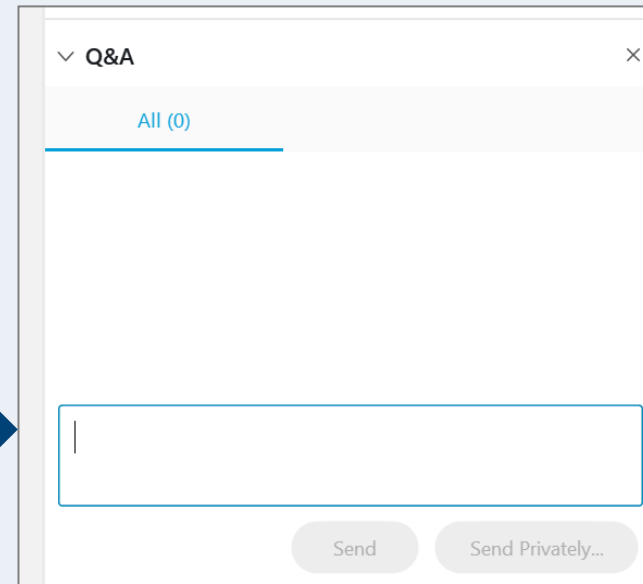


Technical Issues? Questions?

- Please use the **Q&A** feature to ask questions.
 - We will collect questions throughout and will address as many as we can at the end.



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COVID Impact

NC Personalized Assessment Tool 2019–2021

Item
Development

Form
Development

Professional
Development

Cognitive Labs

Field Testing

Feedback

Interviews and Surveys



NC Personalized Assessment Tool Development Schedule

Year	Development Activity
2019–20	Planning Year with Item Development
2020–21	Test Specifications, Item Development, and Professional Development
2021–22	Administer Grades 4 and 7 Mathematics and Reading
2022–23	Administer Grades 4–5, 7–8 Mathematics and Reading
2023–24	Administer Grades 3–8 Mathematics and Reading



Theory of Action

Goal <i>What is the overarching goal(s) of the system?</i>	Outcomes <i>What specific outcomes represent goal attainment?</i>	Elements/Components <i>What approaches, initiatives, and components need to be in place to support attainment of outcomes?</i>	Mechanisms <i>What is the mechanism by which each element of the system will support the attainment of desired outcomes?</i>	Assumptions <i>What assumptions underlie the system working as intended?</i>	Evidence <i>What evidence will demonstrate that the system is working as intended?</i>	Consequences <i>What are the potential intended/unintended consequences?</i>
Intentional through-grade use of assessment data to support teaching and increase student achievement	<p>A balanced assessment system consisting of formative, interim, and summative measures</p> <p>Increased achievement (short term/long term)</p> <p>Reduced achievement gaps</p> <p>Increased assessment and data literacy</p>	<p>Through-grade assessments (interims)</p> <p>Staged-adaptive summative</p> <p>Assessment of higher order thinking skills</p> <p>Professional development in assessment literacy with common language of formative assessment</p> <p>Immediate teacher feedback</p> <p>Student reports</p>	<p>Variety of item types (e.g., TEI, performance tasks)</p> <p>Online reporting</p> <p>Professional development via training modules that can be accessed at any time:</p> <ul style="list-style-type: none"> Regional coaching Online PD modules on assessment and data literacy Online PD modules on the assessment system Training on misconceptions 	<p>Data will be reviewed and used by educators.</p> <p>The system will provide valid and reliable data.</p> <p>The test is aligned to content standards.</p> <p>Teachers will integrate their increased understanding of assessment and data in their day-to-day practices.</p>	<p>Increased student achievement and growth</p> <ul style="list-style-type: none"> Higher percentage of districts meeting long-term goals (designed to close achievement gaps) (links to plans – ESSA, SBOE) Reduction of low performing schools, districts, and charter schools (link to SBOE) 	<p>Intended: Students have more timely feedback on their performance so that they can improve.</p> <p>Teachers have actionable information so that they can use it to change instruction for students.</p> <p>Unintended: Interims become high stakes.</p> <p>Increased stress around testing</p> <p>Testing perceived as increased testing (interims)</p> <p>Impact on local pacing guides</p>



Elements and Components

- Through-grade assessments (3 Interims)
- Staged-adaptive summative assessment
- Assessment of higher order thinking skills
- Professional development
- Immediate teacher feedback
- Student reports



Partnership with The Friday Institute for Educational Innovation

- Professional Development
- Cognitive Labs
- Research to Support Continuous Improvement



Friday Institute Interview Feedback

- Pacing and Alignment
 - No state pacing guide
 - Three domains needed for proficiency indicator
 - Open window
- Assessment Logistics
 - Dynamic reports in NCAdmin
 - NCPAT interims remain low-stakes
- Communications
 - Purpose
 - Design



Technology-Enhanced Items

- What are TEIs?



Cognitive Labs: Purpose

- To gain an understanding of how students think about and approach innovative assessment item types
- Ensure the North Carolina Personalized Assessment Tool interface is appropriate and clear for students so that they are fairly assessed on academic skills



Cognitive Labs: Process

- **Participants:** From April–May 2021, we are looking for fewer than 10 students from various backgrounds and contexts to participate in cognitive labs
- **Recorded interviews:** Each selected student will participate in one 45–60 minute interview with a Friday Institute researcher
- **Think aloud:** As students answer assessment items, researchers will encourage and prompt participants to think out loud about their thought processes and choices



Cognitive Labs: Feedback

- What anticipated issues and concerns do you foresee as the Friday Institute conducts cognitive labs?
- How can the Friday Institute help prepare teachers and students to participate in a cognitive lab?
- What other questions do you have?
- Interested in participating? Contact Dr. Shaun Kellogg at **sbkellog@ncsu.edu**



Upcoming Professional Development Resources

Develop a blended professional development program that will support teachers, coaches, principals and district leaders in implementing the Innovative Assessments, including why the assessments are important for instruction and student learning and how to use data in a systematic way to inform teaching and learning. This will include developing capacity in coaches and district leaders in supporting teachers, including strategies for implementation.



Upcoming Professional Development

Our overarching goal is for participants to learn how to use NCPATs to gauge student academic progress and promote higher learning.



Upcoming Professional Development Resources

- January–May* | development of resources and materials for professional development
- May | review pilot materials
- June–July | pilot materials with several districts for feedback
- August | assess feedback to finalize development

*updates will be made available upon request from NCDPI



Q & A and Next Steps

- The NCDPI will plan for an additional webinar later this spring



Exhibit IV-20 June 15, 2021 Webinar

IADA Update Meeting

June 15, 2021



Welcome and Introduction

NCDPI Accountability Services

Tammy Howard, Ph.D.
Director of Accountability Services

Kinge Mbella, Ph.D.
Lead Psychometrician

Maxey Moore
Section Chief, Test Development

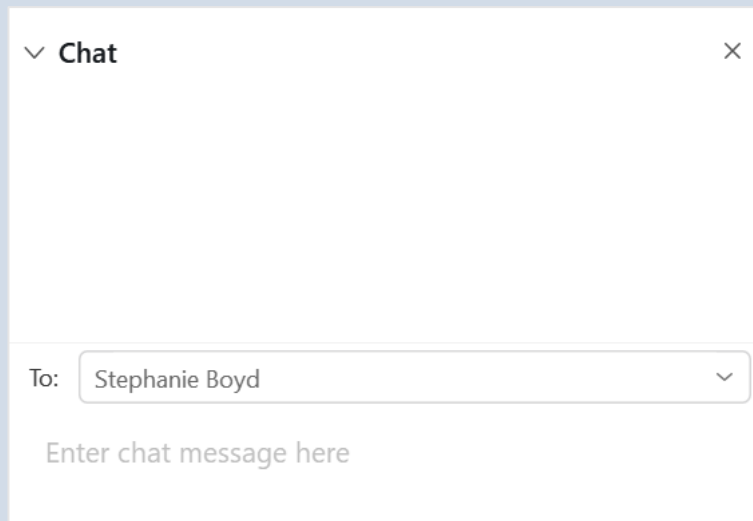
Shannon Jordan
Section Chief, Testing Policy and Operations

Housekeeping

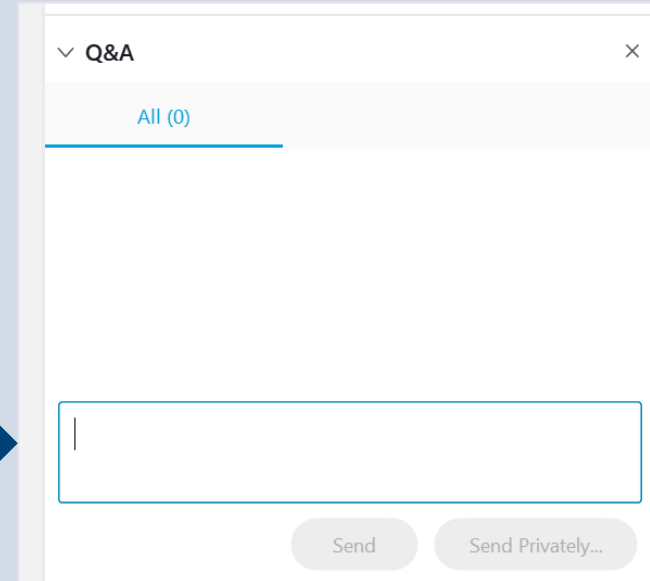
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Guiding Questions

- Why develop a new assessment?
- How will the assessment be different from the current tests?
- What will be piloted and who will participate in the 2021–22 school year?
- What are the administration protocols?
- What professional development will be provided?

Context



Where We are Now



Benefits

- Occurs at the conclusion of instruction
- Is a reliable estimate of students' performance on grade level content
- Provide reliable data for growth and student subgroup performance to support instructional planning



Limitations

- Does not provide actionable data to inform instruction throughout the year
- Estimate is based on a single time point and fixed sets of items/tasks
- Design could be improved to increase classification consistency of students across various academic achievement levels

Stakeholders' Feedback on Current EOGs

Teachers and Administrators

- Would like to get detailed and immediate feedback from assessments highlighting:
 - Skills or content standards students have mastered
 - Skills or content standards in which students need additional support

Parents

- Would like to see the test length shortened, especially in grades 3–5
 - Test administration spread over multiple administrations
 - High stakes nature eliminated to reduce stress
 - Assessments aligned to what is being taught

The Beginning of the Journey

The 2015 Task Force on Summative Assessment led to the development and implementation of NC Check-Ins

Valid and reliable measures of content standards

Assessments throughout the year that inform and guide instruction and that may predict performance on future assessments

A stand-alone summative assessment at the end of the year that may be connected to the interim assessments



Innovative Assessment Demonstration Authority (June 2019)

The Journey Continues

- Required by NC General Statute (Senate Bill 621-2019 session)
 - Reading and mathematics grades 3–8
 - Plan for expansion to science and end-of-course after the conclusion of the pilot/study
 - Annual report to the Joint Legislative Education Oversight Committee (each November 2020–2024)

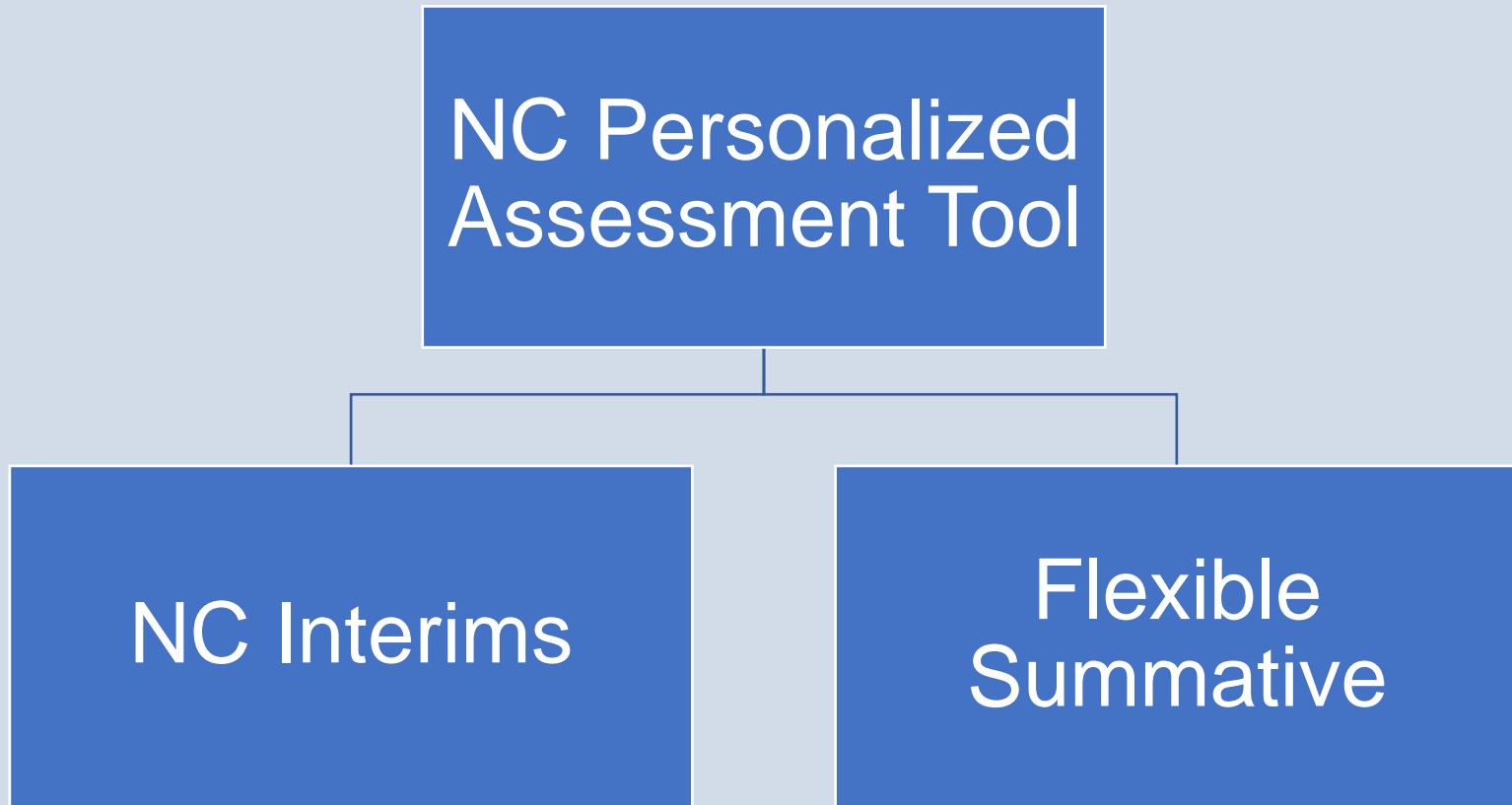
Design Model



Purpose

- The current design purposes of the North Carolina Personalized Assessment Tool are to:
 - provide educators, students, and stakeholders with immediate and detailed feedback on student performance on grade-level-specific content standards so classroom instruction may be tailored to individual student's needs;
 - provide a progress indicator for each interim on individual student performance in relation to overall grade level performance expectation; and
 - provide a reliable estimate to inform a student's summative assessment experience

North Carolina Personalized Assessment Tool



NCPAT System

NC Interims	Flexible Summative
<ul style="list-style-type: none"> Three interim assessments available to districts and schools to provide formative feedback. 	<ul style="list-style-type: none"> Multistaged-fixed adaptive forms designed to provide optimal measurement precision along the entire grade level scale.
<ul style="list-style-type: none"> Single flexible Interim administration window to accommodate for local curriculum. 	<ul style="list-style-type: none"> Flexible test experience for students based on information gathered from NC Interims throughout the year.
<ul style="list-style-type: none"> Interim data will be used to inform most appropriate summative form for each student. 	<ul style="list-style-type: none"> Flexible summative will sample a broader range of content standards without need to increase test length.
<ul style="list-style-type: none"> Updated dynamic formative reports for teachers and students. 	
<ul style="list-style-type: none"> Interims will provide an estimate of student's grade level performance expectation. 	

Research Study

- The NCPAT is a pilot program until North Carolina has evidence and gets approval the system meets all technical requirements.
- During this pilot phase there will be adjustments to the current design primarily based on:
 - feedback from Pilot participants
 - and data review and evidence from technical experts.
- Innovation is a continuous process of change.
 - Through IADA, the department with the support of PSU is committed to systematic transformation of assessment to best support instruction.

Development and Delivery



Timeline for Pilot

Year	Development Activity
2019–20	Item Development
2020–21	Test Specifications, Item Development, and Professional Development
2021–22	Administer Grades 4 and 7 Mathematics and Reading NC Interims <ul style="list-style-type: none"> <i>NC Check-Ins will run parallel</i>
2022–23*	Administer Grades 4, 5, 7, and 8 Mathematics and Reading NC Interims and Flexible Summative <ul style="list-style-type: none"> <i>NC Check-Ins will update to NC Interims</i>
2023–24	Administer Grades 3–8 Mathematics and Reading NC Interims and Flexible Summative

*Possible addition of Grades 5 and 8 Science with standards adoption in June 2022
Field testing in 2022–23, 2023–24 administration

Interim and Summative Availability

	2021–22	2022–23	2023–24*
Pilot Schools	<p>Grades 4 and 7 Mathematics and Reading</p> <ul style="list-style-type: none"> • NC Interims • EOGs <p>Grades 3, 5, 6, and 8 Mathematics and Reading</p> <ul style="list-style-type: none"> • NC Check-Ins • EOGs 	<p>Grades 4, 5, 7, and 8 Mathematics and Reading</p> <ul style="list-style-type: none"> • NC Interims • Flexible Summative <p>Grades 3 and 6 Mathematics and Reading</p> <ul style="list-style-type: none"> • NC Check-Ins • EOGs 	<p><i>Grades 3–8 Mathematics and Reading</i></p> <ul style="list-style-type: none"> • <i>NC Interims</i> • <i>Flexible Summative</i>
All other NC Schools	<p>Grades 3–8 Mathematics and Reading</p> <ul style="list-style-type: none"> • NC Check-Ins • EOGs 	<p>Grades 3–8 Mathematics and Reading</p> <ul style="list-style-type: none"> • NC Check-Ins (grades 3 and 6) • NC Interims (grades 4, 5, 7, and 8) • EOGs 	

*Outcomes of study will affirm feasibility of statewide implementation

2021–22 Reading NC Interims

- Grades 4 and 7 Reading
- Format:
 - 24 items
 - Grade 4: multiple-choice
 - Grade 7: multiple-choice and technology-enhanced
 - 3 reading selections, including distinct selection types (Informational, Literature, or Poetry)
 - For each selection, there will be 6 to 9 four-option multiple-choice items or technology-enhanced items.
 - Suggested time of 90 minutes.

2021–22 Mathematics NC Interims

- Grades 4 and 7 mathematics
 - Interim specifications have been developed with feedback from teachers across the state. The groupings of standards on these interims differs from those used on the NC Check-Ins.
- Format
 - 25 items
 - Item types include four-option multiple-choice items, open-ended numeric entry items, and technology-enhanced items.
 - We have partnered with The Friday Institute to see if we can expand technology-enhanced items to Grade 4.
 - Calculator active and inactive sections
 - Suggested time of 90 minutes

NC Interim Administration



Interim Administrations

- **Eligibility:** (2021–22) Pilot school students following the NC *Standard Course of Study* and enrolled in grades 4 and 7 mathematics and reading.
- **Online administration:** *Only* available online. Accommodations available for students who cannot access the online system.
- **Number of NC Interims:** Three reading and three math interims at grades 4 and 7.

Interim Administrations

- **Interim Administration:**
 - Single or multi-day administration (Local decision)
 - Remote or in-person option (Local decision)
 - No off-grade level administration
 - Order of interim delivery determined by teacher
 - No misadministration form
 - No sample questions
- **Administration and Review Period:**
 - October 1, 2021–May 31, 2022

Professional Development and Communication

- **Online Canvas Course**
 - Audience: Teachers, Coaches, Principals and Directors
 - Format: self-paced modules on the use of formative classroom data
 - Availability: Projected Fall 2021
- Pre-Recorded Webinars available on demand
- Sharing communication in regional meetings and conferences

Next Steps

- Design Individual Student Reports for interims
- Implement professional development courses
- Item development and embedded field test administration
- Administer NC Interims and analyze data
- Development of test specifications for mathematics interims
- Develop NC Interims and Flexible Summative for the 2022–23 school year

Q & A

Any further questions?

Part V Appendix

Exhibit V.A-01 Test Development Process

Assessment Development Process

End-of-Grade, End-of-Course, NC Check-ins, and Grade 3 Portfolio

The test development process is a complex process that involves multiple checks and balances guided by testing experts and professionals. This process begins after new content standards are adopted by the North Carolina State Board of Education. This process includes multiple stakeholders who serve in advisory roles to the test development process including

- North Carolina Educators and Administrators;
- North Carolina Department of Public Instruction (NCDPI)–Standards, Curriculum, and Instruction Specialists;
- North Carolina State University–Technical Outreach for Public Schools (NCSU-TOPS) Content;
- NCSU-TOPS Exceptional Children, English Learners, and Visually Impaired Specialists;
- NCSU-TOPS Production, Editing, and Copyright Staff; and
- Outside Content-Specific Experts.

Prior to the test development process, the standards to be measured are defined during test specification meetings. North Carolina educators collaborate and develop recommendations for a prioritization of standards indicating the relative importance of each standard, the anticipated instructional time, and the appropriateness of the standard for test design for each content area. Subsequently, test development staff from the NCDPI meet with various advisors to review the recommendations from the teacher panels and to adopt final weight distributions across the domains for each grade level.

Once test specifications are adopted, item writers and reviewers complete training on the new subject-specific content standards. The training also includes an overview of item writing, sensitivity, and bias guidelines. North Carolina educators start the item development process by creating new items with various advisors (see bulleted list above) providing feedback on item quality throughout the 18-step test development process. The development process concludes with the NCDPI Test Measurement Specialist evaluating the recommendations from all advisors then finalizing and approving the item, reading selection, or test form.

Item Review Process

Step 1: Item Created

Test items are written by trained item writers, including North Carolina teachers, educators, curriculum specialists, and content specialists at Technical Outreach for Public Schools (TOPS) at North Carolina State University. All items are submitted through an online test development system. The item writer assigns the item

- a Clarifying Objective/Standard,
- a secondary Clarifying Objective/Standard (when appropriate),
- a Depth-of-Knowledge (DOK) rating (if applicable),
- a knowledge type and cognitive category (if applicable), and
- an Achievement Level Descriptor (ALD).

The item writer is also responsible for citing sources of any stimulus material used for an item.

Step 2: Item Evaluation

TOPS Content Specialists review the item for accuracy of content, appropriateness of vocabulary (both subject-specific and general), adherence to item writing guidelines, and sensitivity and bias concerns. All content specialists look for contexts that might elicit an emotional response and inhibit a student's ability to respond as well as contexts that students may be unfamiliar with for cultural or socioeconomic reasons. The specialists review the item's assigned

- Clarifying Objective/Standard,
- Secondary Clarifying Objective/Standard (if applicable),
- DOK rating (if applicable),
- Achievement Level Descriptor,
- Key/Distractors, and
- Knowledge type and cognitive category (if applicable) with the following possible results:
 - If the content of the item is not accurate or does not match an objective/standard, or if the DOK of the item is not appropriate, the item is revised or deleted.
 - If necessary, the specialist should edit the stem and foils of the items for clarity and adherence to established item writing guidelines.
 - If there are necessary revisions outside the technical scope of the specialist (such as artwork, graphs, or edits to reading selections), the item is moved to **Step 3** for edits by Production staff.
 - If the item contains stimulus material, the item is moved to **Step 3** for copyright checks by Copyright staff.

Once the item is accepted, the item is sent to **Step 4** (Teacher Content Review).

Step 3: Production Edits/Copyright Checks

Items needing revisions outside the technical scope of the Content Specialist (such as artwork, graphs, and reading selections) are revised by Production staff. Items with stimulus materials are reviewed by Copyright staff for copyright concerns and proper citation. Once the item is revised by Production staff or reviewed for copyrights, it is moved back to **Step 2** for another review by a Content Specialist.

Step 4: Teacher Content Review

Teacher item content reviewers are required to undergo the same training as item writers and must have content-specific knowledge. Two North Carolina trained item reviewers look for any quality issues or bias/sensitivity issues and suggest improvements, if necessary. The item writer at **Step 1** cannot review their items at **Step 4**. These trained reviewers evaluate the item in terms of

- alignment to grade-level content standard;
- content of item: accurate content, there is one and only one correct answer, appropriate and plausible context;
- cognitive category;
- being clearly written;
- motivated and plausible distractors;
- appropriate assigned achievement level descriptor;
- appropriate assigned depth of knowledge;
- design conforming to North Carolina item writing guidelines;
- appropriate language for the academic content area and age of students; and
- bias or sensitivity concerns.

Step 5: Content Review and Reconcile Teacher Content Reviews

A Content Specialist re-reviews the item for accuracy of content, appropriateness of vocabulary (both subject-specific and general), and checks to make sure the item is correctly keyed. The Content Specialist also reviews all comments/suggestions from the teacher reviewers and makes any appropriate revisions. The Content Specialist may choose one of the following options:

- Send the item to **Step 6** (Production) if there are revisions required that are outside the technical scope of the Content Specialist.
- Send the item to **Step 7** (EC/EL/VI) if the item is ready for the next stage of review.
- Send the item back to **Step 4** (Teacher Review) if major revisions are made to item for a new review.
- Delete the item.

Step 6: Production Edits

Items needing revisions outside the technical scope of the Content Specialist (such as artwork, graphs, and reading selections) are revised by Production staff. Once the item is revised by Production staff, it is sent back to **Step 5** for review by a Content Specialist.

Step 7: Exceptional Children (EC), English Learners (EL), and Visually Impaired (VI) Review

The EC/EL/VI specialist reviews the item for accessibility concerns for EC, EL, and VI students, such as accessibility of graphics for student with or without vision, and also considers accessibility in Braille. This review addresses concerns arising from bias or sensitivity issues, such as contexts that might elicit an emotional response and inhibit a student's ability to respond or contexts that students may be unfamiliar with for cultural or socioeconomic reasons. Review of reading level of the item is considered along with stem and foil quality (stem is a clear and complete question; foils are straightforward; no repetitive words; the grammar of the stem agrees with the foils; review modifying words and make suggestions for bold print and italics or removal; look for idioms and two-word verbs that may provide an accessibility issue for EL students). For Grade 3 Portfolio Items, a Literacy specialist evaluates each item for grade-level appropriateness.

Step 8: Reconcile EC/EL/VI Review

A Content Specialist reviews comments/suggestions from the EC/EL/VI reviewer and the Literacy reviewer for Grade 3 Portfolio, and makes any necessary revisions. The Content Specialist should indicate in the comments whether any comments/suggestions from the reviewer were not approved and incorporated. The Content Specialist may choose one of the following options:

- Send the item to **Step 9** (Production) if there are revisions required that are outside the technical scope of the Content Specialist.
- Send the item to **Step 10** (Grammar Review) for review.
- Send the item back to **Step 4** (Teacher Review) if major revisions are made to item for a new review.
- Delete the item.

Step 9: Production Edits

Items needing revisions outside the technical scope of the Content Specialist (such as artwork, graphs, and reading selections) are revised by Production staff. Once the item is revised by Production staff, it is sent back to **Step 8** for another review by a Content Specialist.

Step 10: Grammar Review

Professional editors review items for grammar, punctuation, and spelling. If the item had previously been sent back to **Step 8** by Editing, the editor should check that the suggested revisions were addressed. If the editor suggests revisions to the item, the item will move back to **Step 8** for review by a Content Specialist. If the editor approves the item as is, the item proceeds to **Step 11** (Security Check).

Step 11: Security Check

Production staff checks to make sure no duplicate copy of the item exists in the test development databases. If there is a duplicate copy of the item or a requested revision was not made, then the item is sent back to **Step 8**.

Step 12: Content Lead Review and Reconcile

Content Lead reviews the item and makes any necessary revisions and also reviews the item comment history to ensure all comments have been addressed. The Content Lead may choose one of the following options:

- Send the item to **Step 13** (Production) if there are revisions required that are outside the technical scope of the Content Lead.
- Move the item to **Step 14** (If approved, move item to **Step 14** NCDPI/Standards, Curriculum, and Instruction Review).
- Send the item back to **Step 4** (Teacher Review) or **Step 2** if major revisions are needed or made to an item.
- Delete the item.

Step 13: Production Edits

Items needing revisions outside the technical scope of the Content Lead (such as artwork, graphs, and reading selections) are revised by Production staff. Once the item is revised by Production staff, it is sent back to **Step 12** for review by the Content Lead.

Step 14: NCDPI/Standards, Curriculum, and Instruction Review

NCDPI/Standards, Curriculum and Instruction Specialists review the item and confirms a clarifying objective or a content standard. The reviewer evaluates the item in terms of

- alignment to grade-level content standard;
- presence of one and only one correct answer;
- the assigned Cognitive Process and Knowledge Type or Depth of Knowledge;
- the assigned Achievement Level Descriptor; and
- bias, sensitivity, or accessibility issues.

Step 15: Reconcile Standards, Curriculum, and Instruction Review

A Content Specialist reviews comments/suggestions from the NCDPI/Standards, Curriculum, and Instruction Specialist, and makes any necessary revisions. The Content Specialist may choose one of the following options:

- Send the item to **Step 16** (Production) if there are revisions required that are outside the technical scope of the Content Specialist.
- Send the item to **Step 17** (Grammar Review) for review.
- Send it back to **Step 2** if major revisions are needed or made to item.
- Delete the item.

Step 16: Production Edits

Items needing revisions outside the technical scope of the Content Specialist (such as artwork, graphs, and reading selections) are revised by Production staff. Once the item is revised by Production staff, it is sent back to **Step 15** for review by a Content Specialist.

Step 17: Grammar Review

Professional editors review items for grammar, punctuation, and spelling. If the item had previously been sent back to **Step 15** by Editing, the editor should check that the suggested revisions were addressed. If the editor suggests revisions to the item, the item will move back to **Step 15** for review by a Content Specialist. If the editor approves the item as is, the item proceeds to **Step 18** for the Test Measurement Specialist (TMS) review.

Step 18: NCDPI/Test Measurement Specialist Review

A NCDPI/TMS reviews for overall item quality. The TMS also checks that quality control measures have been followed by reading the comments from all previous reviews and verifying that the comments have been addressed by the Content Specialists. The TMS evaluates the item for

- alignment to grade-level content standard;
- verification there is one and only one correct answer;
- assigned Cognitive Process and Knowledge Type or Depth of Knowledge;
- bias, sensitivity, or accessibility issues;
- appropriate assigned achievement level descriptor; and
- the overall item quality.

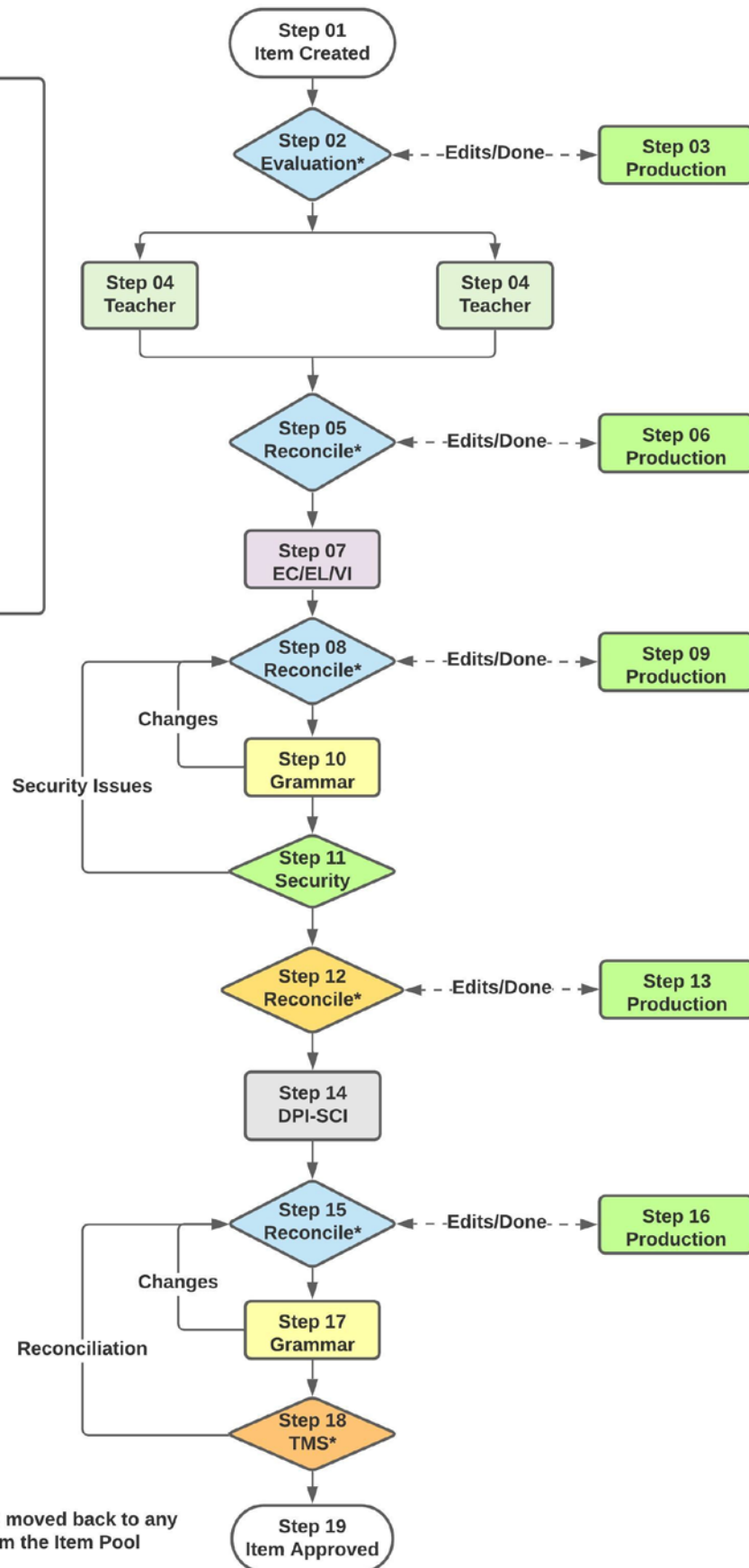
The TMS has four options when submitting the review:

- If the TMS approves the item as is, the item proceeds to **Step 19** (Item Approved).
- If the TMS indicates edits are needed, the item is moved back to **Step 15** for review by a Content Specialist.
- If TMS wants Standards, Curriculum, and Instruction to see the item again, the TMS moves the item back to **Step 14**.
- The TMS can delete the item.

Step 19: Item Approved

The item is now ready for placement on a form.

Item Review



Selection Review Process for End-of-Grade, End-of-Course, NC Check-ins, and Grade 3 Reading Portfolio

Prior to Step 1, the Reading Content Specialist searches for appropriate selections for each assigned grade using criteria from NCDPI/Test Development staff, NCDPI/Standards, Curriculum, and Instruction staff, and the North Carolina *Standard Course of Study*. The Reading Content Specialist also reviews the selections for any bias and sensitivity concerns.

Offline

Step 1: Folder Created

The Content Specialist creates a review folder for the selection. A Selection Form Submission tracking form is completed with the necessary copyright information (Content Specialist's name, date, title, author, source, excerpts, photographs, etc., as well as copyright date and ISBN, if applicable, and the selection's readability score), and is attached to the inside of the review folder. Any suggested edits are noted on the selection. A selection routing sheet is attached (includes grade level and title of selection) to the outside of the folder.

Step 2: Copyright Approval & Title/Author Search

Editing staff determines if the selection is public domain, gratis, or copyrighted (if copyrighted, determine whether the publisher may be used or if there is a concern, such as excessive expense) and searches all selection databases to determine if the selection is already in use.

Step 3: Content Approval

The Content Lead evaluates the selection in terms of

- alignment to grade-level expectations,
- content and length of the selection,
- readability of the selection,
- achievement level descriptors,
- bias or sensitivity concerns, and
- issues brought up by copyright review.

Based on review, the Content Lead can

- approve the selection as is,
- approve the selection with edits or additions (including edits to or addition of artwork), or
- delete the selection.

NOTE: If selection is included in the form, the Content Lead sends a new copy to the Copyright Staff so they can seek permission from the publisher.

Step 4: Exceptional Children (EC), English Learner (EL), and Visually Impaired (VI) Review

The EC/EL/VI reviewer evaluates the selection for accessibility concerns for EC, EL, and VI students in terms of

- concerns because of bias or sensitivity issues, such as contexts that might elicit an emotional response and inhibit a student's ability to respond and contexts that students may be unfamiliar with for cultural or socioeconomic reasons;
- accessibility of graphics for students with or without vision;
- appropriateness for Braille;

- prior knowledge required to understand the selection; and
- unfamiliar vocabulary that cannot be understood from the surrounding context.

Based on review, the EC/EL/VI reviewer can recommend to

- use the selection,
- use the selection with suggested edits, or
- not use the selection.

Step 5: NCDPI/Test Measurement Specialist Review

The NCDPI/Test Measurement Specialist (TMS) evaluates the selection in terms of

- alignment to grade-level expectations;
- content and length of the selection;
- readability of the selection;
- achievement level descriptors;
- any bias or sensitivity concerns including any raised by the EC/ESL/VI reviewer; and
- edits made by content at **Steps 1 and 3** or edits suggested in the **Step 4** review.

If the TMS rejects the selection, it is deleted from the pool. If the TMS approves the selection, it is moved to **Step 6**.

Step 6: Prepare for Online

Issues noted in EC/EL/VI and TMS reviews are reconciled by a Content Specialist, and the selection is sent to production to be entered into the online test development system.

NOTE: If any edits or additions are made to the selection (including edits to or addition of artwork), the Content Specialist sends a new copy to the Copyright Staff so they can seek permission from the publisher if copyrighted should the selection be designated for inclusion in a test form.

Online Test Development System

Step 1: Selection Created

Production staff performs another selection security check and enters the selection into the test development system.

Step 2: Compare Original

Editing staff compares the original copy of the selection to what has been entered into the test development system and indicates any necessary corrections. The corrections may arise from discrepancies between the TDS and the original or from correctable errors in the original, such as grammatical errors, misspellings, or archaic/foreign spelling of words.

Step 3: Creation Reconcile

A Content Specialist resolves corrections indicated in **Step 2**.

Step 4: Creation Edits

Production makes requested changes and selection is sent back to **Step 3** for a Content Specialist to confirm requested changes have been made to selection.

Step 5: NCDPI/Standards, Curriculum, and Instruction Review

A NCDPI/Standards, Curriculum, and Instruction Specialist reviews the selection. The reviewer evaluates the selection in terms of

- alignment to grade-level expectations;
- content and length of the selection;
- readability of the selection; and
- bias or sensitivity concerns.

Step 6: NCDPI/Test Measurement Specialist Review

The NCDPI/Test Measurement Specialist (TMS) does a final review on the selection and reviews all comments from the NCDPI/Standards, Curriculum, and Instruction Specialist. The TMS either approves the selection (with comments regarding revisions, if any) or deletes the selection from the pool.

Step 7: Reconcile Curriculum and Instruction Review and Test Measurement Specialist Review

A Content Specialist reviews any comments/changes requested by Standards, Curriculum, and Instruction or by the Test Measurement Specialist and sends changes to **Step 8** (Production) to be made, if necessary. Once any changes are made, the selection is sent to **Step 9**.

NOTE: If the selection is designated for inclusion on a test form, any edits or additions are made to the selection (including edits to or addition of artwork). The Content Specialist then sends a new copy to the Copyright Staff if permission is needed from the publisher.

Step 8: Production Edits

Production makes requested changes and selection is sent back to **Step 7** for a Content Specialist to confirm requested changes have been made.

Step 9: Selection Approved

Selection is now ready to have items written.



Form Review Process for End-of-Grade, End-of-Course, NC Check-ins, and Grade 3 Reading Portfolio

Prior to Step 1, a NCDPI/Psychometrician chooses the test items for the initial placement of the preliminary base form, taking key balance into consideration.

Step 1: Upload Form

A Psychometrician creates the form, and uploads a file listing the Item IDs to populate the form. The form is sent to **Step 3** for form review. Forms can come back to this step from **Step 3** with suggestions for replacements, or from **Step 4** with suggestions for replacements or revisions (either concerning the content of the item or for key issues). The Psychometrician can replace items or incorporate revisions. The Psychometrician sends the form to **Step 2** (Production Edits) for revisions to artwork, graphs, or reading selections.

Step 2: Production Edits

Revisions to operational items such as artwork, graphs, and reading selections are made by Production staff. If any revisions are made, the form is sent back to **Step 1** for review by a Psychometrician.

Step 3: Form Review

A Content Specialist reviews the items on the form for content alignment and quality of content and reviews the form for conflicts or repetition of content.

If any items are replaced because of concerns regarding conflicts or repetition of content among items, or for quality concerns, the Content Specialist sends the form back to **Step 1** with comments for the Psychometrician. Otherwise, the form is sent to **Step 4** for Test Measurement Specialist Review.

Step 4: NCDPI/Test Measurement Specialist Review/Key Balance

This review step is conducted to ensure that the form is ready for Outside Content-Specific Expert Review and Key Check (i.e., the form is ready to send to printer) and considers both item- and form-level quality as follows:

- The Test Measurement Specialist (TMS) reviews each item, including any comments. Suggestions for revisions to items are made as needed.
- After reviewing the quality of each item, the form is evaluated in terms of cueing, repetition, content coverage, and balance across Depths of Knowledge and Types/Cognitive Processes.
- The key balance of the form is checked. If the key balance needs adjusting, these suggestions are made by the NCDPI/TMS and the form is returned to **Step 1**.

After reviewing each item, the TMS adds any form-level comments and suggested improvements, and they can

- send the form back to **Step 1** with suggestions for replacements or revisions,
- move the form to **Step 5** (Reconcile), or
- delete the form from the pool.

Step 5: Reconcile by Content Specialist

The Content Specialist reviews the form comments to ensure any suggested replacements or revisions have been addressed and that any approved replacements or revisions have been made correctly. If any replacements or revisions need adjusting, the Content Specialist moves the form back to **Step 1** with comments. Otherwise, the form moves to **Step 6** (Outside Content-Specific Expert Review and Key Check).

Step 6: Outside Content-Specific Expert Review and Key Check

At this step, the form is sent for Outside Content-Specific Expert Review and Key Check. Outside Content-Specific Experts review the form by answering each item, selecting the correct answer and providing any comments and/or suggestions about the item. They verify that the item is presented correctly and that the answer to the item is correct and they provide overall suggestion about item quality. (Outside content-specific experts are not involved in creating any item. They are not affiliated with NCDPI or NCSU-TOPS agencies and serve as objective, independent reviewers. These experts must have verified credentials and experience in their subject matter area and be approved by NCDPI as content experts.)

Step 7: Reconcile Outside Content-Specific Expert Review

A Content Specialist checks the keyed response from the Outside Content-Specific Expert Review against the key for each item and reviews all comments and/or suggestions from the Outside Content-Specific Expert. Any key disagreements are reconciled, and any comments and/or suggestions from the Outside Content-Specific Expert are addressed.

Step 8: NCDPI/Psychometric Review/Key Balance

A Psychometrician performs the following:

- reviews comments/suggestions from the Outside Content-Specific Expert and from Editing staff, with consultation with the TMS and Content Specialists;
- checks key agreement with the Outside Content-Specific Experts and resolves any disagreements through consultation with the TMS and Content Specialists;
- makes any approved revisions, or indicates revisions for Production staff to make, and sends the form to **Step 9** (Production Edits); and
- reloads the form if any items are replaced at **Step 8**.

Step 9: Production Edits

Revisions to items outside the technical scope of the Psychometrician (items such as artwork, graphs, and reading selections) are made by Production staff. Once the revisions are made, the form is sent back to **Step 8** for review by a Psychometrician.

Step 10: Grammar Review

Two editors independently review the form for grammatical and/or formatting issues, providing comments and/or suggestions as needed.

Step 11: Content Lead Review/Finalize Form

The Content Lead reviews the form comment history to ensure all comments have been addressed and consults with VI specialist regarding accessibility issues. After reviewing the form, the Content Lead

- moves the form back to **Step 8** if any edits to operational items need review or
- approves the form and moves it to **Step 12** (Item Placement) for cloning and embedding or

- approves the form and moves it to **Step 21** (Final Manager Review) when the form is not being cloned or embedded.

Step 12: Item Placement

A Content Specialist places approved items in the embedding slots. The Content Specialist needs to check that

- the placed items match the layout files for the version of the base form;
- the quality of items embedded is appropriate for experimental use;
- the items do not cue operational items or other embedded items;
- the items diversify topic coverage across content;
- the keys of the embedded items do not create an unbalanced key for the overall form and the overall difficulty level of the items; and
- the Achievement Level Descriptor and Depth of Knowledge or Knowledge Type/Cognitive Process are consistent with the surrounding base form.

After placing the items, the Content Specialist may choose one of the following options:

- Send the form to **Step 13** (Production Edits) for revisions to artwork, graphs, or reading selections.
- Send the form to **Step 14** (Cueing Check).
- Delete the form.

Step 13: Production Edits

Revisions to embedded experimental items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 12** for review by a Content Specialist.

Step 14: Cueing Check

The Content Specialist and TMS review the entire form to check that the embedded items do not create cueing or repetition issues, the embedded items diversify topic coverage across content, and that the embedded items' quality is acceptable. The TMS also makes sure the key balance is adequate. TOPS EC/EL/VI also looks over the embedded items to make sure that there are not any accessibility issues. TOPS EC/EL/VI makes a recommendation whether the form should be used for Braille. After the review, the Content Specialist can replace or revise embedded items based on the review. The Content Specialist then moves the form to **Step 15** for Outside Content-Specific Review/Grammar check.

Step 15: Outside Content Expert Review Key Check and Grammar Check

An Outside Content-Specific Expert and Editing staff member each review the embedded items. The Outside Content-Specific Expert reviews the embedded items by working and answering each item and providing any comments or suggestions as needed. Editing staff reviews the items for any grammar, punctuation, spelling issues, and/or formatting issues, providing comments and/or suggestions as needed.

Step 16: Reconcile by Content Specialist

A Content Specialist checks the keyed response from the Outside Content-Specific Expert Review against the key for each item and reviews all comments and/or suggestions from the Outside Content-Specific Expert. Any key disagreements are reconciled and any comments and/or suggestions from the Outside Content-Specific Expert are addressed. The Content Specialist also reviews suggestions from Editing staff and makes any necessary revisions.

If any items require substantial revisions, the item should be replaced and the form sent back to **Step 15**.

The Content Specialist can

- send the form to **Step 17** (Production Edits) for needed revisions,
- send the form to **Step 18** (TMS Final Review), or
- delete the form.

Step 17: Production Edits

Revisions to embedded experimental items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 16** for review by a Content Specialist.

Step 18: Test Measurement Specialist Final Review

The TMS reviews the form, considering the comments from the **Step 15** reviews to ensure all comments have been addressed properly. The key balance of the form is checked. The TMS makes any needed edits to items. The TMS sends the form to **Step 19** (Production Edits) if any revisions are needed to artwork, graphs, or reading selections. Then the TMS sends the form to **Step 20** (Final Grammar).

Step 19: Production Edits

Revisions to operational items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 18** for review by the TMS.

Step 20: Final Grammar Review

An Editor reviews the entire form for grammatical and/or formatting issues, providing comments and suggestions as needed.

Step 21: Final Manager Review

A Content Manager reviews comments/suggestions from the Final Grammar Review or **Step 24** (Compare) and makes any necessary revisions to embedded items. The Manager checks the form for overall quality and reviews the form comment history to ensure all comments have been addressed. The Content Manager ensures that the VI review was completed at **Step 11**.

After reviewing the form, the Content Manager may choose one of the following options:

- Approve the form and send it to **Step 23** (Audio Approval) if the form will be administered online.
- Approve the form and send it to **Step 24** (Compare) if the form will be administered on paper.
- Send the form to **Step 20** (Psychometrician) if there are suggested revisions to operational items for the Psychometrician to consider.
- Send the form to **Step 22** (Production Edits) for revisions to artwork, graphs, or reading selections.
- Reject the form.

Step 22: Production Edits

Revisions to embedded experimental items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 21** for review by a Content Manager.

Step 23: Audio Approval

Content Specialists review the audio for each item and either approves the audio or indicates it needs a correction. After the audio for all items have been approved, the form is sent to **Step 24** (PDF/Online Check).

Step 24: PDF/Online Check

At this step, Production staff exports the form as a document and formats the document per formatting guidelines. The form is placed in a folder with a signoff sheet for the following tasks:

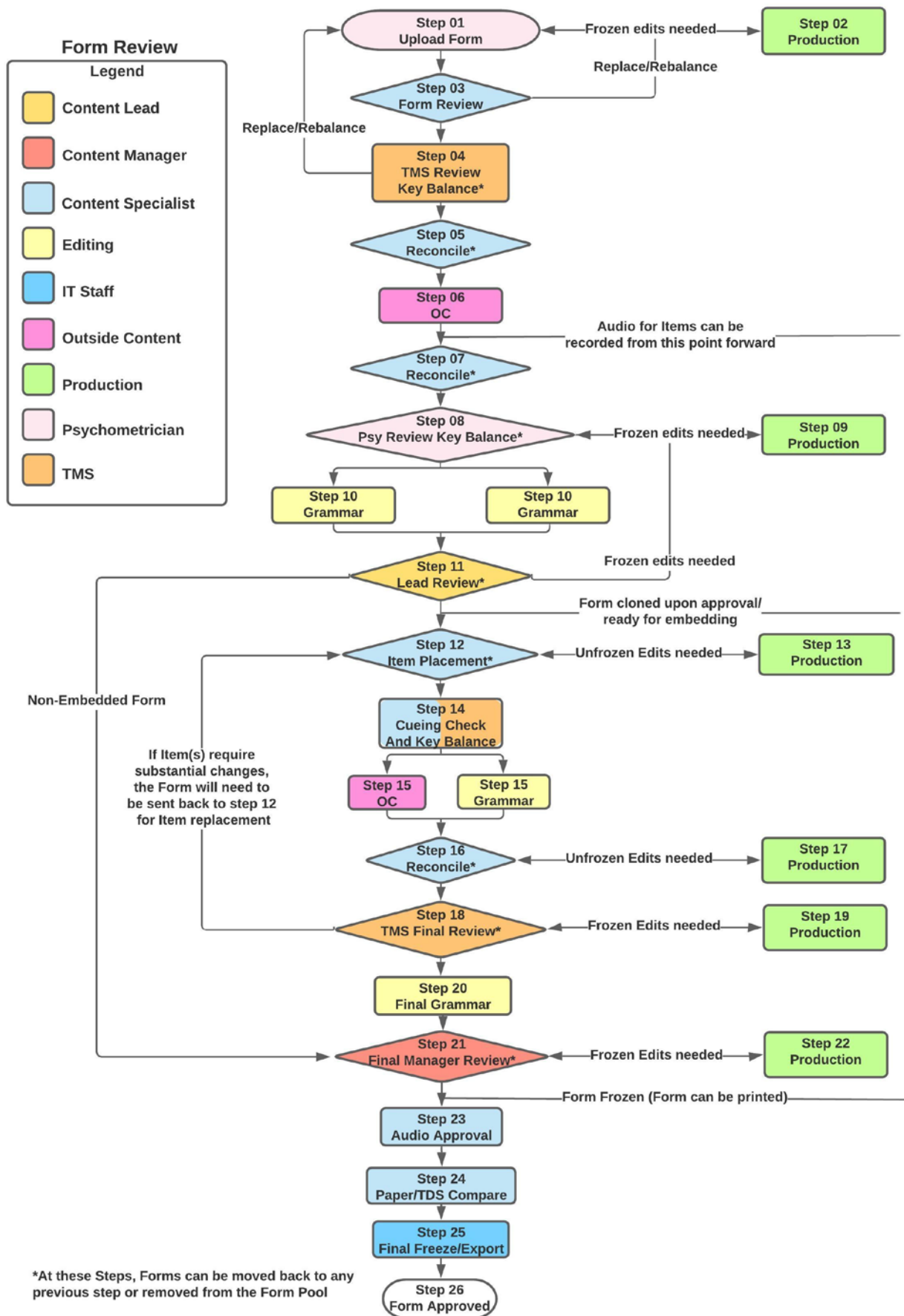
- Two Editors review the form for formatting concerns as well as any grammatical issues.
- A Content Specialist reviews the form for content and evaluates any comments and or suggestions from Editing reviews. If there are any edits to embedded items to execute in the online test development system, the Content Specialist indicates with each item what edits are approved and sends the form back to **Step 21**. Any suggestions that are rejected should be noted in the form comments. Any suggested edits to operational items that Content staff feel warrant consideration are directed to the TMS and Psychometrician for consideration.
- A Content Manager makes any approved edits in the online test development system and sends the form to **Step 23** for recorded online forms or **Step 24** for unrecorded or paper-only forms.
- After production staff makes corrections to the paper copy, the file is converted to a PDF and printed. The printed copy undergoes the same review as bullets 1–3 above.
- After the PDF of the form is approved, the form is sent to **Step 25** (Final Freeze/Export). If the forms are also offered online, the online forms will also be sent to **Step 25**.

Step 25: Final Export

The form, all items, and any selections are operationally locked to prevent any revisions. This is to ensure that the published versions of the form, items, and selections are preserved electronically. Any online forms undergo checks in a variety of platforms to ensure that each item's content displays correctly and audio files for non-reading subjects read correctly.

Step 26: Form Approved

The form is approved for administration.



Item Development Process for the NCEXTEND1 Alternate Tests

Prior to **Step 1**, the standards to be measured must be defined. The test development process begins after new content standards are adopted by the North Carolina State Board of Education. All item writers and reviewers are required to complete training modules. The training includes a general course on item writing guidelines, including lessons on sensitivity and bias concerns.

The writers and reviewers must also complete subject-specific courses on the Extended Content Standards.

Step 1: Item Created

Test items are written by trained item writers, including North Carolina teachers, educators, curriculum specialists, and content specialists at Technical Outreach for Public Schools (TOPS) at North Carolina State University. All items are submitted through an online test development system. The item writer assigns the item

- an Extended Content Standard,
- a secondary Clarifying Objective/Standard (when appropriate),
- a Depth-of-Knowledge (DOK) rating (if applicable),
- a knowledge type and cognitive category (if applicable), and
- an Achievement Level Descriptor (ALD).

The item writer is also responsible for citing sources for any stimulus material used for an item.

Step 2: Item Evaluation

Content Specialists review the item for accuracy of content, appropriateness of vocabulary (both subject-specific and general), adherence to item writing guidelines, and sensitivity and bias concerns. All Content Specialists (subject and the EC/EL/VI specialist) look for contexts that might elicit an emotional response and inhibit students' ability to respond as well as contexts that students may be unfamiliar with for cultural or socioeconomic reasons. The specialists review the item's assigned

- Clarifying Objective/Standard,
- Secondary Clarifying Objective/Standard (if applicable),
- DOK rating (if applicable),
- Achievement Level Descriptor,
- Key/Distractors, and
- Knowledge type and cognitive category (if applicable) and consider the following options:
 - If the content of the item is not accurate or does not match an objective/standard, the item is revised or deleted.
 - If necessary, the specialist should edit the stem and foils of the items for clarity and adherence to established item writing guidelines.
 - If there are necessary revisions outside the technical scope of the specialist (such as artwork, graphs, or edits to reading selections), the item is moved to **Step 3** for edits by Production staff.
 - If the item contains stimulus material, the item is moved to **Step 3** for copyright checks by Copyright staff.

Once the content specialist has spent the needed time on the item and certifies that it is ready to be on a form, the items is sent to **Step 4** (Teacher Content Review).

Step 3: Production Edits/Copyright Checks

Items needing revisions outside the technical scope of the Content Specialist (such as artwork, graphs, and reading selections) are revised by Production. Items with stimulus materials are reviewed by Copyright staff for copyright concerns and proper citation. Once the item is revised by Production or reviewed for copyrights, it is moved to **Step 2** for another review by a Content Specialist.

Step 4: Teacher Content Review

Teacher item reviewers are required to undergo the same training as item writers. At this step, two North Carolina trained item reviewers look for any quality issues or bias/sensitivity issues and suggest improvements, if necessary. One of the teacher reviewers is an exceptional children's teacher, and the other is a general education teacher. The exceptional education teacher pays particular attention to the item's appropriateness for student populations with moderate to severe intellectual disabilities. Both trained reviewers evaluate the item in terms of

- alignment to grade-level content standard;
- content of item: accurate content, there is one and only one correct answer, appropriate and plausible context;
- cognitive category;
- being clearly written;
- motivating and plausible distracters;
- appropriate assigned achievement level descriptor;
- appropriate assigned depth of knowledge
- design conforming to North Carolina item writing guidelines;
- appropriate language for the academic content area and age of students; and
- bias or sensitivity concerns.

Step 5: Reconcile Teacher Content Reviews

A Content Specialist carefully reviews all comments/suggestions from the content reviewers and makes any appropriate revisions. The Content Specialist may choose one of the following options:

- Send the item to **Step 6** (Production) if there are revisions required that are outside the technical scope of the Content Specialist.
- Send the item to **Step 7** (EC/EL/VI) if the item is ready for the next stage of review.
- Send it back to **Step 4** (teacher review) if major revisions are made.
- Delete the item.

Step 6: Production Edits

Items needing revisions outside the technical scope of the Content Specialist (such as artwork, graphs, and reading selections) are revised by Production staff. Once the item is revised by Production staff, it is sent back to **Step 5** for review by a Content Specialist.

Step 7: Exceptional Children (EC), English Learner (EL), and Visually Impaired (VI) Review

The EC/EL/VI Specialist reviews the item for accessibility concerns for students with significant cognitive disabilities along with concerns for EL and VI students, such as accessibility of graphics for students with or without vision and also considers Braille accessibility. This review addresses bias or sensitivity issues such as contexts that might elicit an emotional response and a inhibit

student's ability to respond and contexts that students may be unfamiliar with for cultural or socioeconomic reasons. Review of reading level of the item is considered along with stem and foil quality (stem is a clear and complete question, foils are straightforward, no repetitive words, the grammar of the stem agrees with the foils, idioms do not provide an accessibility issue).

Step 8: Reconcile EC/EL/VI Review

A Content Specialist reviews comments/suggestions from EC/EL/VI Specialist and makes any necessary revisions. The Content Specialist may choose one of the following options:

- Send the item to **Step 9** (Production) if there are revisions required that are outside the technical scope of the Content Specialist.
- Send the item to **Step 10** (Grammar Review) for review.
- Send it back to **Step 4** (teacher review) if major revisions are made.
- Delete the item.

Step 9: Production Edits

Items needing revisions outside the technical scope of the Content Specialist (such as artwork, graphs, and reading selections) are revised by Production staff. Once the item is revised by Production staff, it is sent back to **Step 8** for another review by a Content Specialist.

Step 10: Grammar Review

Professional editors review items for grammar, punctuation, and spelling with the following possible results:

- If the item had previously been sent back to **Step 8** by Editing, the editor should check that the suggested revisions were addressed.
- If the editor suggests revisions to the item, the item will move back to **Step 8** for review by a Content Specialist.
- If the editor approves the item as is, the item proceeds to **Step 11** (Security Check).

Step 11: Security Check

Production staff checks to make sure no duplicate copy of the item exists in previous test forms or released items. If there is a duplicate copy of the item, then the item is returned to **Step 8** and removed from the item pool.

Step 12: Alternate Test Lead Review

The Alternate Test Lead reviews the comment history to ensure all comments have been addressed in terms of assessing students with significant cognitive disabilities. The Alternate Test Lead may choose one of the following options:

- Approve the item and move it to **Step 13** (Content Lead Review).
- Send it back to **Step 8** (Content Specialist Review) if revisions are requested.

Step 13: Content Lead Review and Reconciliation

The Content Lead reviews the item and makes any necessary revisions and also reviews the item comment history to ensure all comments have been addressed. The Content Lead may choose one of the following options:

- Send the item to **Step 14** (Production) if there are revisions required that are outside the technical scope of the Alternate Test Lead.
- Approve the item and move it to **Step 15** (Test Measurement Specialist (TMS) Review).

- Send it back to **Step 2** if major revisions are made to the item.
- Delete the item.

Step 14: Production Edits

Items needing revisions outside the technical scope of the Content Lead (such as artwork, graphs, and reading selections) are revised by Production staff. Once the item is revised by Production staff, it is sent back to **Step 13** for review by the Content Lead.

Step 15: Test Measurement Specialist Final Review

A TMS reviews for overall item quality and alignment. The TMS also checks that quality control measures have been followed by reading the comments from all previous reviews and verifying that the comments have been addressed by the Content Specialists.

The TMS evaluates the item for

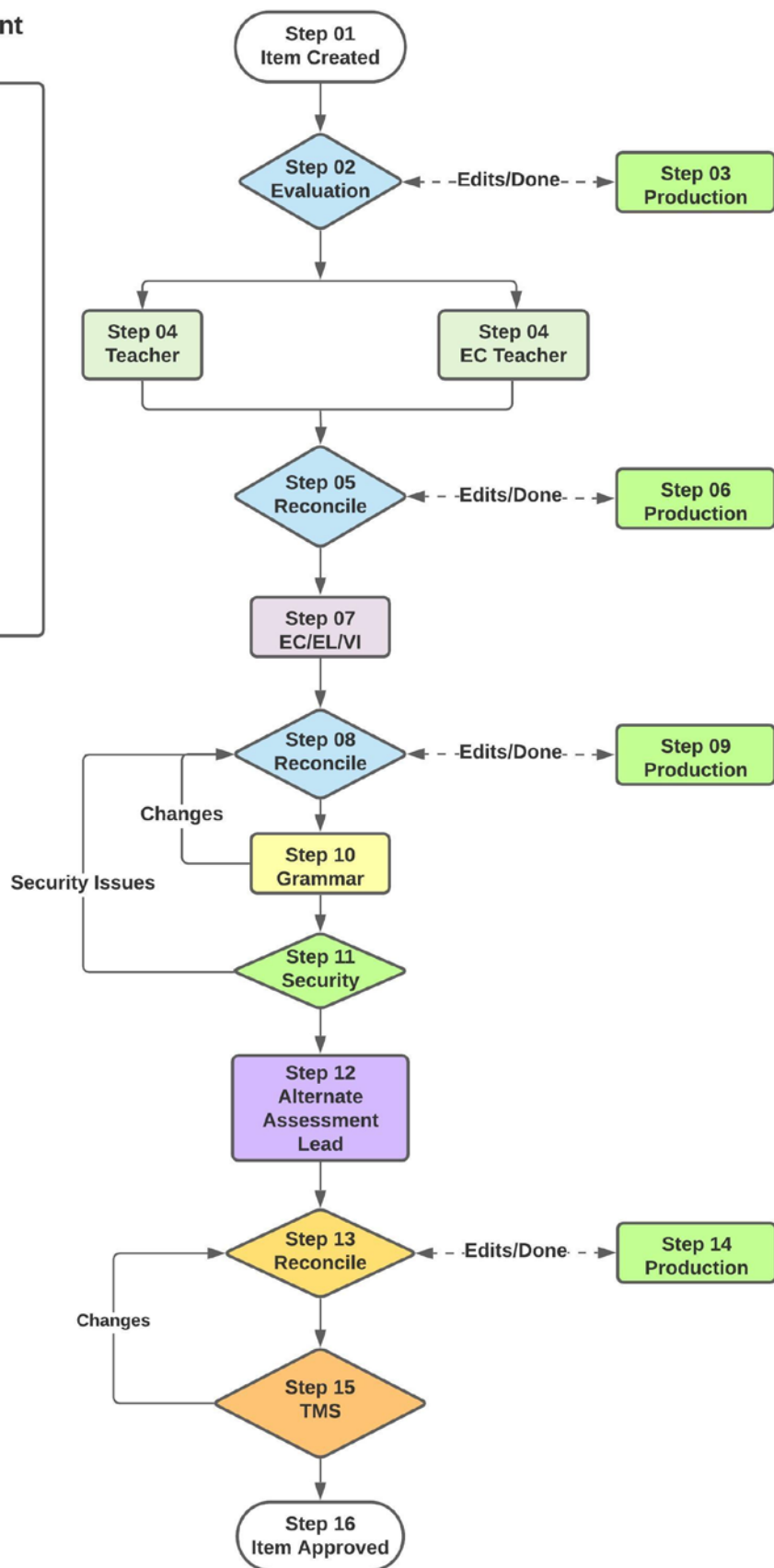
- alignment to grade-level content standard;
- verification there is one and only one correct answer;
- appropriate assigned achievement level descriptor;
- appropriate cognitive category;
- bias, sensitivity, or accessibility issues; and
- the overall item quality.

The TMS has these options when submitting the review:

- If the TMS approves the item as is, the item proceeds to **Step 16** (Item Approved).
- If the TMS indicates edits are needed, the item is returned to **Step 13** for review by a Content Specialist.
- The TMS can also choose to **delete** the item.

Step 16: Item Approved

The item is now ready for placement on a form.



Selection Review Process for the *NCEXTEND1* Alternate Tests

Prior to Step 1, a Reading Content Specialist searches for appropriate selections for each assigned grade using criteria from Test Development staff and the North Carolina Extended Content Standards. The Reading Content Specialist also reviews the selections for any bias and sensitivity concerns. The Content Specialist creates a folder (color-coded by genre) for the selection. A Selection Form Submission slip is completed with the necessary copyright information (specialist's name, date, title, author, source, excerpts, etc., as well as copyright date and ISBN, if applicable) and the selection's readability score, and this is attached to the inside of the folder. Any suggested edits are noted on the selection. On the outside of the folder, a selection routing sheet is attached (includes grade level and title of selection). The Content Specialist also works with Production to create graphics to illustrate content in the selections.

Step 1: Selection Entered

Production staff enters the selection into the test development system. Graphics are inserted into the selection as well.

Step 2: Grammar Check and Copyright Approval & Title/Author Search

The editing staff performs the following:

- reviews selections for grammar, punctuation, and spelling;
- determines if the selection is public domain, gratis, or copyrighted (if copyrighted, determine whether the publisher may be used or if there is a problem, such as excessive expense); and
- searches all selection databases to determine if the selection is already in use.

Step 3: Content Reconcile

Issues noted in Copyright reviews are reconciled by a Content Specialist. The Content Specialist reviews once more to ensure that the selection has

- alignment to grade-level expectations;
- appropriate content, selection length, readability; and
- contains no bias or sensitivity or copyright concerns.

Based on review/reconciliation, the Content Specialist can

- approve the selection as is and move to **Step 5** or
- send the selection to **Step 4 Production** for edits or additions, including artwork. (If any edits or additions are made to the selection including edits to or addition of artwork, the Content Specialist sends a new copy to the Copyright Staff so they can seek permission from the publisher if copyrighted.)

Step 4: Production Edits

Production staff makes edits to artwork. Once revisions are made, the selection is sent back to **Step 3** for another review by a Content Specialist.

Step 5: Alternate Test Lead Review

The Alternate Test Lead evaluates the selection for accessibility concerns for EC, EL, and VI students in terms of

- accessibility for students with significant cognitive disabilities;
- content and length of the selection;
- readability of the selection;
- bias or sensitivity issues, such as contexts that might elicit an emotional response and inhibit students' ability to respond and contexts that students may be unfamiliar with for cultural or socioeconomic reasons;
- accessibility of graphics for students with or without vision;
- appropriateness for Braille;
- prior knowledge required to understand the selection; and
- unfamiliar vocabulary that cannot be understood from the surrounding context.

Any suggested edits are noted on the selection. Based on the review, the Alternate Test Lead can recommend to

- use the selection,
- use the selection with suggested edits, or
- not use the selection.

Step 6: Content Reconcile

Any issues noted in the Alternate Test Lead review are reconciled by a Content Specialist.

NOTE: If any edits or additions are made to the selection (including edits to or addition of artwork), the Content Specialist sends a new copy to the Copyright Staff so they can seek permission from the publisher if copyrighted. Selections needing revision outside the technical scope of the Content Specialist are revised by Production Staff at **Step 7**.

Step 7: Production Edits

Production staff makes edits to artwork. Once revisions are made, the selection is sent back to **Step 6** for another review by a Content Specialist.

Step 8: Test Measurement Specialist Final Review

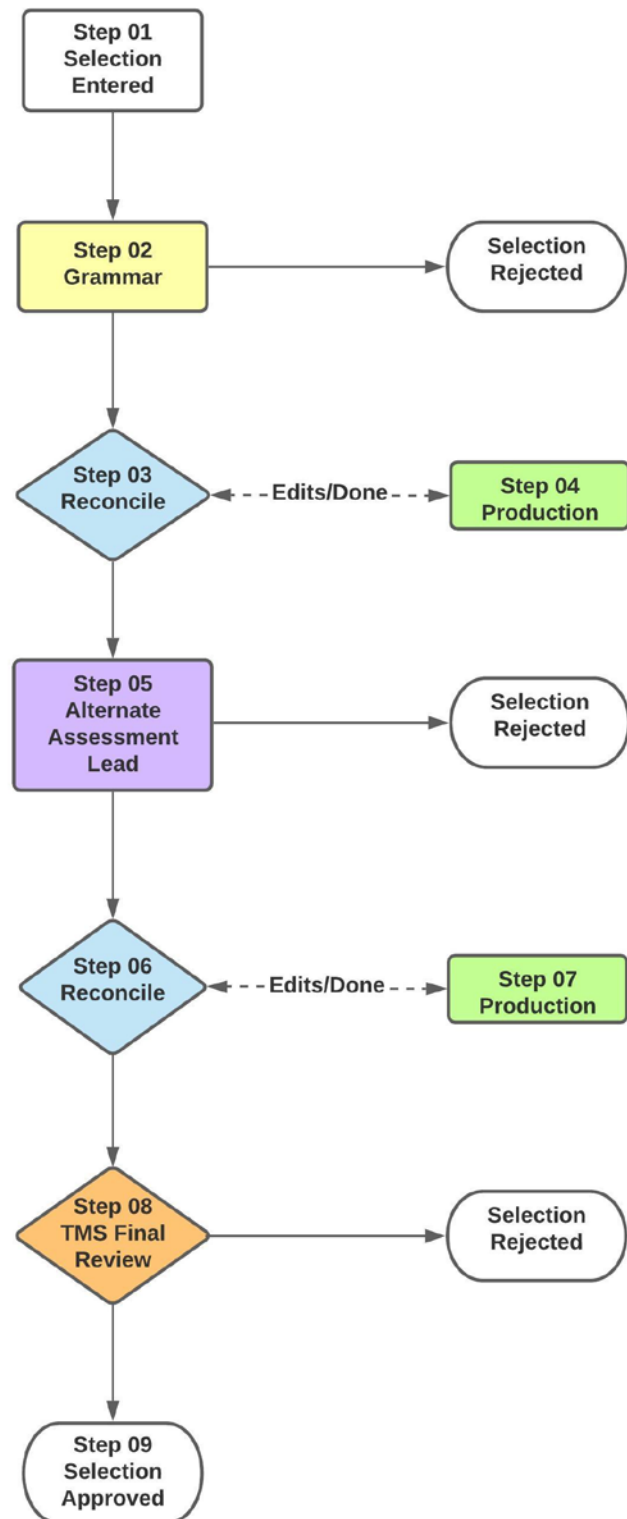
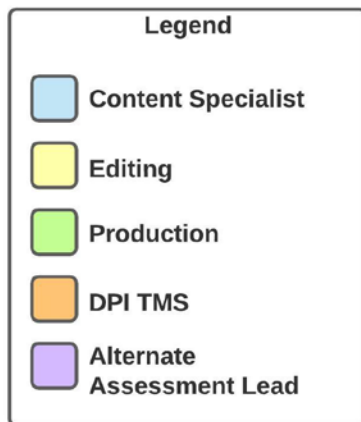
The Test Measurement Specialist (TMS) evaluates the selection for

- alignment to grade-level expectations,
- content and length of the selection,
- readability of the selection, and
- bias or sensitivity concerns.

The TMS also evaluates any bias or sensitivity concerns raised by the Alternate Test Lead review and edits made by Content at **Steps 1 and 3**. If the TMS rejects the selection, it is deleted from the pool. If the TMS approves the selection, then it moves to **Step 9**.

Step 9: Selection Approved Selection is now ready to have items written to it.

Alternate Assessment Selection Review



Form Review Process for the *NCEXTEND1* Alternate Tests

Prior to Step 1: Psychometrician reviews the test items for the initial placement in the form, taking key balance into consideration.

Step 1: Select Item Numbers

A Psychometrician selects/approves the items to populate the form. The Psychometrician can send the form to **Step 2** (Production Edits) for revisions to artwork, graphs, or reading selections, if needed, or sends the form to **Step 3** for content review. If needed, the Psychometrician approves any item replacement or revisions.

Step 2: Production Edits

Revisions to items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 1** for review by the Psychometrician.

Step 3: Form Review/Reconciliation

A Content Specialist reviews the items on the form for content alignment and quality of content, and reviews the form for conflicts or repetition of content.

If any items need to be replaced due to concerns regarding conflicts or repetition of content among items, or for quality concerns, the Content Specialist sends the form back to **Step 1** with comments for the Psychometrician. If revisions are needed to items such as artwork, graphs, and reading selections, the form is sent to **Step 4** for production edits. Otherwise, the form is sent to **Step 5**, Test Measurement Specialist (TMS) review.

Step 4: Production Edits

Revisions to items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 3**.

Step 5: Test Measurement Specialist Review

This review step is conducted to ensure that the form is ready for Outside Content Key Check (i.e., the form is ready for students) and considers both item- and form-level quality with the following sequence:

- The TMS will submit a review for each item, including any comments. Suggestions for revisions to items should be made only when necessary.
- After reviewing the quality of each item, the form should be evaluated in terms of cueing, repetition, and content coverage.
- The key balance of the form is checked. If the key balance is poor, the TMS will suggest which items' foils to reorder and what the key ought to be. Any suggestions for key balance edits must be approved by the Psychometrician. The form is then returned to **Step 1**.

After reviewing each item, the TMS can add form-level comments and suggested improvements, and can

- send the form back to **Step 1** with suggestions for replacements or revisions,
- move the form to **Step 6** (Reconcile), or
- delete the form from the pool.

Step 6: Reconcile

At this step, the form is ready for Outside Content Key Check. The Content Specialist should review the form comments to ensure any suggested replacements or revisions have been addressed and that any approved replacements or revisions have been made correctly. If any replacements or revisions were made incorrectly, the Content Specialist moves the form back to **Step 1** with comments. If any revisions are needed to artwork, graphs, or reading selections the form is sent to **Step 7** (Production Edits). Otherwise, the form moves to **Step 8** (Outside Content Key Check).

Step 7: Production Edits

Revisions to items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 6** for review by a content specialist.

Step 8: Outside Content-Specific Expert Review and Key Check

An Outside Content Specialist reviews the form by answering each item and providing any comments and/or suggestions. (Outside content-specific experts are not involved in creating any item. They are not affiliated with NCDPI or NCSU-TOPS agencies and serve as objective, independent reviewers. These experts must have verified credentials and experience in their subject matter area and be approved by NCDPI as content experts.).

Step 9: Reconcile Outside Content-Specific Expert Review

Content Specialist checks the keyed response from the Outside Content-Specific Expert Review against the key for each item and reviews all comments and/or suggestions from the Outside Content-Specific Expert. Any key disagreements are reconciled, and comments and/or suggestions from the Outside Content-Specific Expert are addressed. Forms needing revision outside the technical scope of the Content Specialist are revised by Production at **Step 10**.

Step 10: Production Edits

Revisions to items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 9** for review by a Content Specialist.

Step 11: Psychometric Review/Key Balance

A Psychometrician performs the following:

- reviews comments/suggestions from the Outside Content-Specific Expert and from Editing staff, with consultation with the TMS and Content Specialists;
- checks key agreement with the Outside Content-Specific Expert and resolves any disagreements through consultation with the TMS and Content Specialists;
- makes any approved revisions, or indicates revisions for Production staff to make, and sends the form to **Step 12** (Production Edits); and
- checks the key balance.

Step 12: Production Edits

Revisions to items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 11** for review by the Psychometrician.

Step 13: Grammar Review

An editor reviews the form for grammatical and/or formatting issues, providing comments and/or suggestions as needed.

Step 14: Reconcile Grammar Review

A Content Specialist reviews the form and reviews all comments from Editing staff and addresses any suggestions. Forms needing revision outside the technical scope of the Content Specialist are revised by Production at **Step 15**. If no corrections are needed, the form moves to **Step 16** for review by the Alternate Test Lead.

Step 15: Production Edits

Revisions to embedded experimental items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 14** for review by a Content Specialist.

Step 16: Alternate Test Lead Review

The Alternate Test Lead reviews the comment history to ensure all comments have been addressed in terms of assessing students with significant cognitive disabilities. The Alternate Test Lead may choose one of the following options:

- Approve the form and move it to **Step 17** (Test Measurement Specialist Final Review).
- Send the form back to **Step 14** (Content Specialist Review) if revisions are requested.

Step 17: Test Measurement Specialist Final Review

The TMS reviews the form, considering the comments from the **Step 16** review to ensure all comments have been addressed properly. The key balance of the form is checked. The TMS makes any needed edits to items. Then the TMS sends the form to **Step 19** (Final Grammar). Forms needing revisions to artwork, graphs, and reading selections are sent to Production at **Step 18**.

Step 18: Production Edits

Revisions to items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 17**.

Step 19: Final Grammar Review

An editor reviews the form for grammatical and/or formatting issues, providing comments and/or suggestions as needed.

Step 20: Final Manager Review

A Content Manager reviews comments/suggestions from the Grammar Review and makes any necessary revisions. The Manager checks the form for overall quality and reviews the form comment history to ensure all comments have been addressed. After reviewing the form, the Content Manager may choose one of the following options:

- Approve the form and send it to **Step 22**.
- Send the form to **Step 11** (Psychometrician) if there are suggested revisions to operational items for the Psychometrician to consider.
- Send the form to **Step 21** (Production Edits) for revisions to artwork, graphs, or Reading selections.
- Reject the form.

Step 21: Production Edits

Revisions to items such as artwork, graphs, and reading selections are made by Production staff. Once the revisions are made, the form is sent back to **Step 20**.

Step 22: Export and Step 23: Final Freeze

The form is exported to paper. The form, all items, and any selections are operationally locked to prevent any revisions. This is to ensure that the published versions of the form, items, and selections are preserved electronically.

Step 24: Form Approved

The form is approved for administration.

Last Revised: February 8, 2021

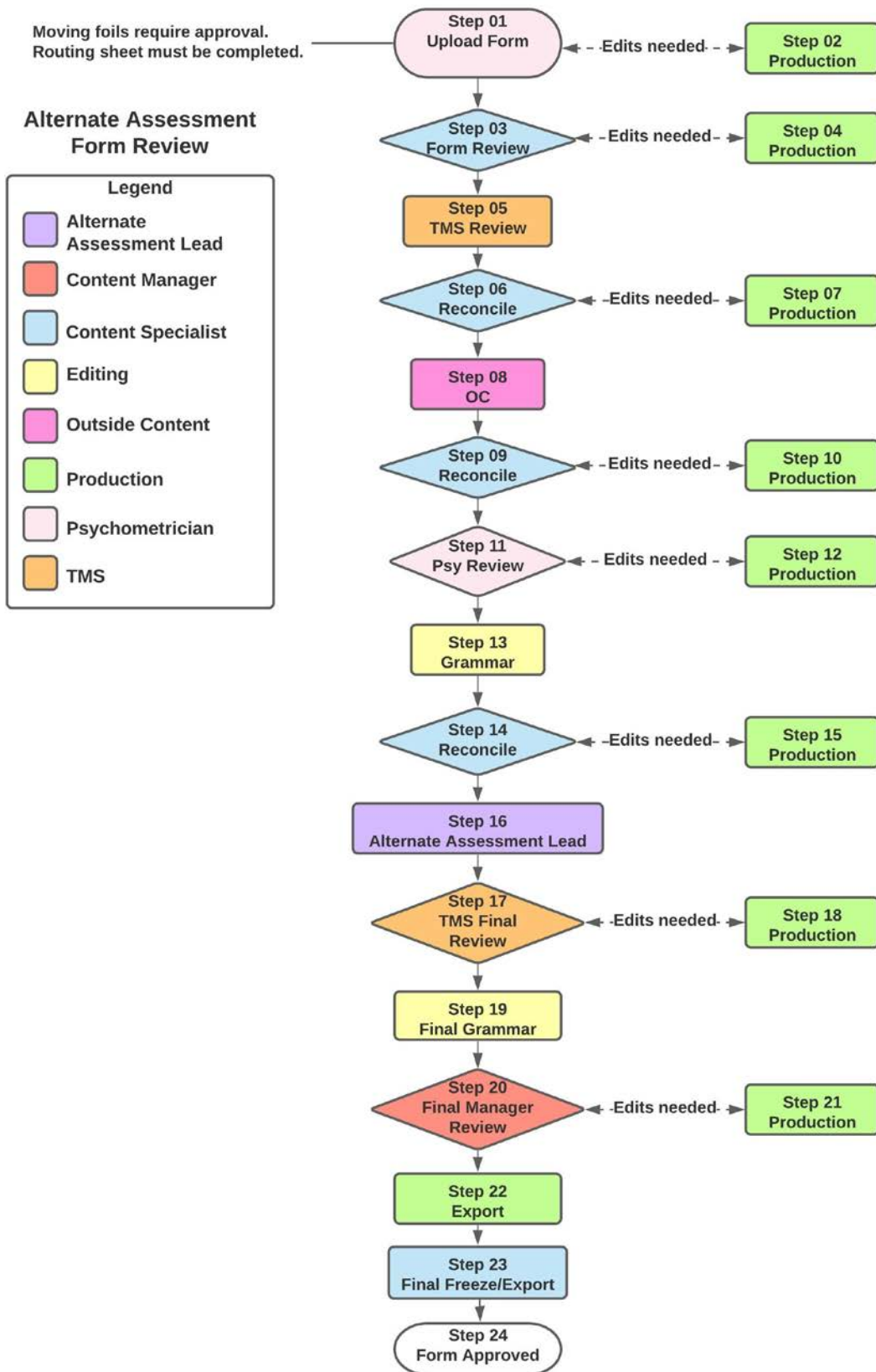


Exhibit V.A-02 Item Writer and Reviewer Demographic Information for
Mathematics and Reading at Grades 3–8 for 2020–21

Reviewers

Gender	Female	62
	Male	8
Ethnicity	African American	7
	Asian	3
	Caucasian	53
	Hispanic	1
	Multi-Racial	1
	Native American	3
	Other	2
Eth	Black	7
	Hispanic	1
	Other	9
	White	53
Degree	BA	11
	BS	17
	MA	22
	MLS	2
	MS	16
	Other	1
Deg	Graduate	41
	Other	1
	Undergraduate	28
Exp	0-5	2
	6-10	17
	11-15	7
	16-20	16
	20+	28

Writers

Gender	Female	216
	Male	37
	Unspecified	9
Ethnicity	African American	27
	Asian	3
	Caucasian	199
	Hispanic	3
	Multi-Racial	4
	Native American	14
	Other	2

Eth	Unspecified	10
	Black	27
	Hispanic	3
	Other	23
	Unspecified	13
	White	196
Degree	6-Year Degree	2
	BA	46
	BS	58
	Ed.D	6
	MA	91
	MLS	2
	MS	44
	Other	4
	Unspecified	9
Deg	Graduate	143
	Other	4
	Undergraduate	102
	Unspecified	13
Exp	0-5	18
	6-10	44
	11-15	49
	16-20	57
	20+	81
	Unspecified	13

Exhibit V.A-03 Online Item Writer Training Sample

TD101A: Test Development Basics

TD101A: Test Development Basics

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Your progress ?

Introduction

The design of these courses is generally linear, requiring the online trainee to step through each resource (Web page, PDF, etc.) in a structured sequence. At the end of most topic areas, trainees are required to take a short quiz to demonstrate understanding of the presented material before moving to the next topic area. All online quizzes may be taken as many times as needed in order to meet the requirements for moving forward in the course. Once trainees have viewed a resource, they are able to return to it for reference at any time.

This course provides an overview of the test development process and the basic rules and structures of item formats allowed by the North Carolina Testing Program.























Upon completion of this short course, those interested in item writing and/or reviewing should complete the sequence of one of the B-level courses covering cognitive taxonomies used in writing and reviewing assessment items. Finally, trainees will need to complete one or more of the C-level, subject-specific courses that provide an overview of the individual subject standards. After completion of the required courses, trainees can submit an application to be an item writer/reviewer for the NCDPI.

The TD101A self-directed course should take approximately one (1) hour to complete. Upon successful completion, trainees will be provided enrollment keys for the B-level courses on cognitive taxonomies.

The Test Development Process



 Test Development Overview	<input checked="" type="checkbox"/>
 Multiple-Choice Test Development Process	<input checked="" type="checkbox"/>
 Test Design and Item Types	<input checked="" type="checkbox"/>
 System for Submitting/Reviewing Items	<input checked="" type="checkbox"/>

Multiple-Choice Item Writing



 Multiple-Choice Item Writing Guidelines	<input checked="" type="checkbox"/>
 Universal Design for Learning and Assessment	<input checked="" type="checkbox"/>
 Basic Terminology	<input checked="" type="checkbox"/>
 Test Item Format - Question Format	<input checked="" type="checkbox"/>
 Test Item Format - Best Answer Format	<input checked="" type="checkbox"/>
 Stem	<input checked="" type="checkbox"/>
 Foils	<input checked="" type="checkbox"/>
 Charts and Graphs	<input checked="" type="checkbox"/>
 Avoid Complexity	<input checked="" type="checkbox"/>
 Minimize Wording	<input checked="" type="checkbox"/>
 Use of Third Person	<input checked="" type="checkbox"/>
 Positive Wording	<input checked="" type="checkbox"/>
 "Of the following . . ."	<input checked="" type="checkbox"/>
 Use Correct Language Conventions	<input checked="" type="checkbox"/>
 Do Not Use Contractions or Abbreviations	<input checked="" type="checkbox"/>
 Avoid Misleading Items and Clang Association	<input checked="" type="checkbox"/>
 Do Not Use Humor	<input checked="" type="checkbox"/>
 Diversity	<input checked="" type="checkbox"/>
 Considerations for Students with Disabilities	<input checked="" type="checkbox"/>
 Considerations for Students Who Are English Learners	<input checked="" type="checkbox"/>
 Content Guidelines	<input checked="" type="checkbox"/>
 Item Writing & General Guidelines Quiz	<input type="checkbox"/>

TD101A: Test Development Basics





Fairness and Sensitivity

 Guidelines for Bias/Sensitivity in Item Writing	
 Questions to Ask Before Submitting An Item	
 Common Language	
 Avoid Stereotypes	
 Avoid Offensive Content	
 Socioeconomic/Family Sensitivity	
 Artwork	

Security and Copyrights

 Security and Copyrights	
 About the Testing Code of Ethics	
 North Carolina Testing Code of Ethics	
 Test Security Agreement	
 Ownership of Items Authored	
 Avoid Trademarks	
 Work Site Security Issues	
 Security and Copyrights Quiz	

Next Steps

 Accessing the TD101B Series Courses	
 Not available unless: You achieve a required score in Security and Copyrights Quiz	
 Certificate of Completion	

TD101A: Test Development Basics

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Test Development Overview

North Carolina tests are standards-based, criterion-referenced achievement tests designed to measure student performance with respect to the North Carolina *Standard Course of Study*. Whenever content standards are created or revised and then adopted and approved by the North Carolina State Board of Education (SBE), the test development process begins. The test development process consists of six phases, beginning with the development of test specifications and ending with the reporting of operational test results at the student, school, district, and state levels.

Last modified: Friday, March 29, 2019, 2:19 PM

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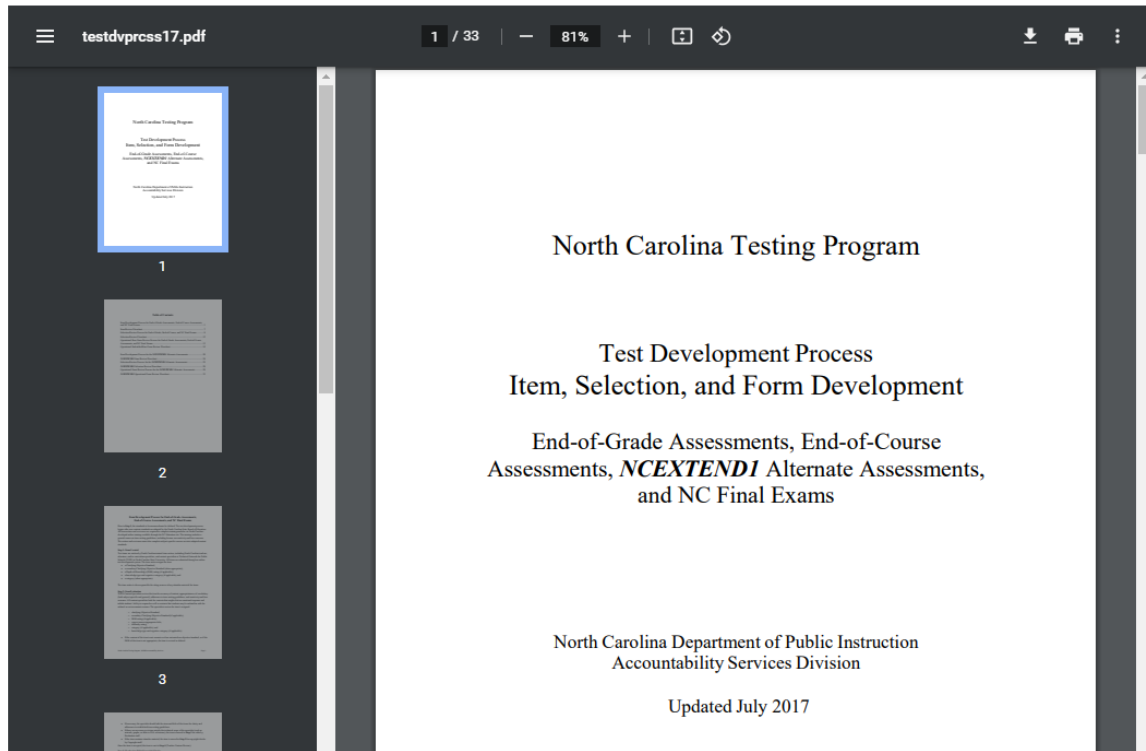
[Next: Multiple-Choice Test Development Process](#)

TD101A: Test Development Basics

TD101A: Test Development Basics

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Multiple-Choice Test Development Process



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Test Design and Item Types

As North Carolina periodically revises the *Standard Course of Study* and Essential Standards, stakeholders and leaders reflect on the knowledge and skills necessary for student success in each content area and grade. Once the new standards are adopted by the State Board of Education, new assessments are designed to effectively measure what students know and are able to do.

Last modified: Friday, March 3, 2017, 8:01 AM

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System for Submitting/Reviewing Items

Items are submitted through an online platform known as the Test Development System, or TDS for short. Item writers are assigned contracts through the TDS. The contract will consist of the standards or selections assigned to the writer and the number of items per standard/selection. All items written for the North Carolina Testing Program are submitted through the TDS.

The item review process for teachers also takes place within the TDS. Item reviewers have a secure login to access item queues for each subject and/or grade level. Each item receives an independent review from multiple reviewers who answer a checklist of questions.

Last modified: Tuesday, June 23, 2020, 7:58 AM

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TD101A: Test Development Basics

TD101A: Test Development Basics

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Multiple-Choice Item Writing Guidelines

The North Carolina Testing Program has created test item guidelines to ensure uniformity and application that falls within the scope of high-stakes testing programs to which item writers must adhere. The information presented in this training addresses these item writing guidelines as they apply to the North Carolina Testing Program.

The following resources (1) explain the guidelines for writing items and (2) provide examples of weak items and improved items.

At the conclusion of this topic, there will be a quiz to assess understanding and application of the guidelines.

This topic content was adapted from *Developing and Validating Multiple-Choice Test Items* by Thomas M. Haladyna, 1994, 1999, 2004.

Last modified: Friday, March 29, 2019, 2:27 PM

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[Next: Universal Design for Learning and Assessment](#)

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Universal Design for Learning and Assessment

What is Universal Design?

The concept of Universal Design originated in architecture with the goal to provide maximum accessibility and usability of buildings, outdoor spaces, and living environments. This concept is centered on the belief that our environments should be accessible and usable by everyone, regardless of their age, ability, or circumstance. When applied to learning and assessment, Universal Design centers around development and creation of learning environments and assessments that are accessible and usable by all students, including students with disabilities and students who are English Learners.

The North Carolina Department of Public Instruction (NCDPI) is committed to the creation of summative assessments that incorporate Universal Design principles.

Why is this important?

North Carolina's student population is diverse. Students have varied life experiences; economic and family situations; religions; dietary preferences and restrictions; recreational opportunities; and exposure to popular culture and consumer products. Assessments that incorporate Universal Design principles allow students to demonstrate proficiency on tested content regardless of the students' background, gender, race, disability, etc.

Last modified: Wednesday, May 24, 2017, 10:32 AM

[Previous: Multiple-Choice Item Writing Guidelines](#)

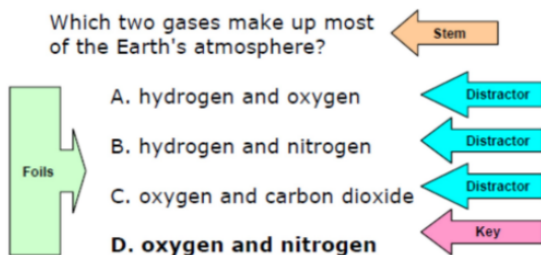
[Next: Basic Terminology](#)

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Basic Terminology

- Stem - the question, including text, charts/graphs,
- Foils - the answer choices
- Distractors - the incorrect answer choices
- Key - the correct answer



Last modified: Tuesday, June 23, 2020, 8:06 AM

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[Next: Test Item Format - Question Format](#)

TD101A: Test Development Basics

TD101A: Test Development Basics

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Test Item Format - Question Format

- All multiple choice items must be written in question format (not fill-in-the-blank or completion).
- What is being asked must be clear to the student.
- Any directions must be simple and clear.

Weak Item

The first permanent English settlement in North America was

- A. St. Augustine
- B. Santa Fe
- C. Jamestown
- D. New Amsterdam

Improved Item

Which was the first permanent English settlement in North America?

- A. St. Augustine
- B. Santa Fe
- C. Jamestown
- D. New Amsterdam

Last modified: Tuesday, June 23, 2020, 8:07 AM

[Previous: Basic Terminology](#)

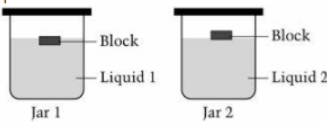
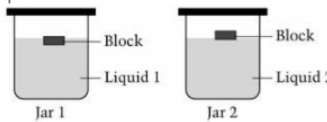
[Next: Test Item Format - Best Answer Format](#)

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Test Item Format - Best Answer Format

- There must be one correct response.
- Distractors (incorrect answer choices) must be incorrect, but plausible.

Weak Item	Improved Item
<p>Look at the diagrams below. They show what happened when two solid blocks were each put in a jar containing a liquid.</p>  <p>Based on the diagrams, what can be concluded?</p> <ul style="list-style-type: none">A. The block in jar 1 is heavier than the block in jar 2.B. The blocks in both jars are about the same size.C. The block in jar 1 is floating lower in its liquid than is the block in jar 2.D. The block in jar 1 must be made of metal, and the block in jar 2 must be made of wood.	<p>Look at the diagrams below. They show what happened when two solid blocks were each put in a jar containing a liquid.</p>  <p>Based on the diagrams, what can be concluded?</p> <ul style="list-style-type: none">A. The blocks in both jars are made of wood.B. The blocks in both jars are made of plastic.C. The block in liquid 1 has almost the same density as the liquid.D. The block in liquid 2 is more dense than the liquid.

In the weak item, distractor B is also arguably a correct response. Also in the weak item, distractors A and D are implausible. In the improved item, distractors A, B, and D are all incorrect responses but are plausible in that they represent common student errors.

Last modified: Wednesday, February 22, 2017, 1:34 PM

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TD101A: Test Development Basics

TD101A: Test Development Basics

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Stem

- Write the items so that the central idea and any common elements are included in the stem instead of the foils.
- Place the question sentences in as close proximity to the foils as possible.
- Use qualifying words in a stem when they are needed to emphasize the "best answer." Words such as "best" and "most likely," should appear in bold italics. Reading items should *not* use qualifying words.

Weak Item	Improved Item
Which shape will always have at least one right angle? A. A square will always have at least one right angle. B. A triangle will always have at least one right angle. C. A trapezoid will always have at least one right angle. D. A quadrilateral will always have at least one right angle.	Which shape will <i>always</i> have at least one right angle? A. square B. triangle C. trapezoid D. quadrilateral

In the weak item, the qualifying words are not bolded and italicized, and the central idea in the stem is repeated in the foils. The improved item bolds and italicizes the qualifying words and removes the repeated central idea from the foils.

Last modified: Tuesday, June 23, 2020, 8:10 AM

[Previous: Test Item Format - Best Answer Format](#)

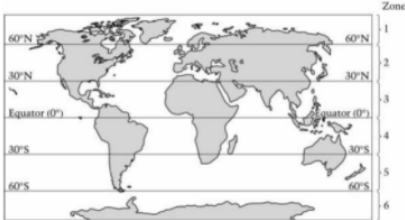
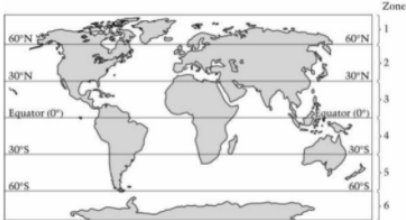
[Next: Foils](#)

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Foils

- Multiple-choice items for general assessments must contain four foils (A, B, C, D).
- Multiple-choice items for NCEXTEND1 assessments must contain three foils (A, B, C).
- Answer choices should be ordered logically, such as ascending or descending value for numbers; the order in which the words appear in a chart; chronological order; etc.
- Foils that use quotes from a selection should be ordered as presented in the selection.
- If the foils are fragments, please do not capitalize or use end marks. If the foils are sentences, please use a capital letter to start the sentence, and finish it with an end mark.
- Foil length must be balanced. At least two foil lengths must be nearly the same so that one of the four foils does not stand out. The lengths do not need to be exactly the same, but if one is extremely long or short, it can cause the student to choose the answer for that reason alone.

Weak Item	Improved Item
<p>This map represents different zones of the world based on latitudes.</p>  <p>Which zones in the map <i>most likely</i> have warm summers and cold winters?</p> <p>A. 2 and 4 B. 2 and 5 C. 3 and 6 D. 1 and 4</p>	<p>This map represents different zones of the world based on latitudes.</p>  <p>Which zones in the map <i>most likely</i> have warm summers and cold winters?</p> <p>A. 1 and 4 B. 2 and 4 C. 2 and 5 D. 3 and 6</p>

In the improved item, the foils follow the order in which the zones appear in the map.

TD101A: Test Development Basics

- Foils should be independent and not overlapping.

Weak Item	Improved Item
How much does a Channel Bass usually weigh? A. up to 75 pounds B. less than 100 pounds C. between 30 and 40 pounds D. more than 30 pounds	How much does a Channel Bass usually weigh? A. over 100 pounds B. between 60 and 80 pounds C. between 30 and 40 pounds D. less than 20 pounds

In the weak item, a fish that weighed 35 pounds would be the correct response for A, B, C, and D.

-
- To the extent possible, foils for an item should be homogeneous in content and length.
 - All of the above, none of the above, I don't know* are not used as foils.
 - Word the foils positively; avoid any negative phrasing.
 - Avoid providing clues to the correct response.
 - Avoid writing items in which phrases in the stem are repeated in the foils.
 - Avoid specific determiners because they are so extreme that they are seldom the correct response. To the extent possible, specific determiners such as ALWAYS, NEVER, TOTALLY, and ABSOLUTELY should not be used when writing items.

Weak Item	Improved Item
What most likely happens when consumers increase their purchases of goods and services? A. Businesses will increase production, and workers will receive more income. B. Businesses will never increase production, and workers will receive less income. C. Businesses will decrease production, and workers will always receive more income. D. Businesses will decrease production, and all workers will receive less income.	What most likely happens when consumers increase their purchases of goods and services? A. Businesses will increase production, and workers will receive more income. B. Businesses will increase production, and workers will receive less income. C. Businesses will decrease production, and workers will receive more income. D. Businesses will decrease production, and workers will receive less income.

The weak item has specific determiners in distractors B, C, and D ("never," "always," and "all" respectively). The improved item eliminates these errors.

Last modified: Tuesday, June 23, 2020, 8:17 AM

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Charts and Graphs

- Charts and graphs should be clearly marked and labeled to ensure the necessary information is accessible to all students.
- Do not use the letters A, B, C, or D on charts and graphs (these letters are reserved to identify foils).
- When labeling artwork or graphics, do not spell words (such as F, L, A, and G to label the points of a rectangle).
- Refer specifically to the chart/graph that is included in an item. For example, "Bob made this chart . . ."
- Introductory information should appear above the chart/graph. The sentence asking the question should appear below the chart/graph.
- Charts and graphs should be original or copyright free.

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Avoid Complexity

Avoid writing complexly formatted items. Item structure should not be confusing to students.

Weak Item

Which are symbols of North Carolina?

I. cardinal
III. Boykin spaniel

II. honeybee
IV. dogwood

- A. I and III only
B. II and III only
C. III and IV only
D. I, II, and IV only

Improved Item

Which are symbols of North Carolina?

- A. cardinal and fire ant
B. Boykin spaniel and shad boat
C. dogwood and soda
D. honeybee and Plott hound

In the weak item, the foils require the student to translate the Roman numerals to the information in the stem. This item format can cause the student to process complex information unrelated to the content. The improved item tests the student's knowledge directly.

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Minimize Wording

- Avoid excessive wordiness and use of irrelevant information.
- Use simple or compound sentences.
- Avoid unusual or low frequency words and replace them with common words.

Weak Item

Newspaper classified ads usually contain three types of information: phone number, item description, and item cost. What is the role of classified advertising in market economies?

- A. to increase competition between imports and local goods and services
B. to inform consumers of available products and services
C. to convert production costs into corporate profits
D. to enhance spending and nationwide consumption

Improved Item

What is the role of classified advertising in market economies?

- A. to increase competition between imports and local goods and services
B. to inform consumers of available products and services
C. to convert production costs into corporate profits
D. to enhance spending and nationwide consumption

The weak item provides information in the stem that is unnecessary to answer the question.

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Use of Third Person

Items should be written in third person (he/she/it).

Weak Item

Why do you think the author included the quotation from the city manager complimenting Ellen's report?

- A. to show how Ellen saves money
- B. to describe Ellen's feelings
- C. to emphasize Ellen's achievement
- D. to explain why Ellen lives in the city

The weak item contains the pronoun "you" in the stem. The improved item removes this pronoun.

Improved Item

Why did the author include the quotation from the city manager complimenting Ellen's report?

- A. to show how Ellen saves money
- B. to describe Ellen's feelings
- C. to emphasize Ellen's achievement
- D. to explain why Ellen lives in the city

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Positive Wording

Items should be worded positively. Avoid using negative words such as "not" and/or "except."

Weak Item

Which is not a part of Darwin's Theory of Evolution by natural selection?

- A. Individuals in a population vary in many ways.
- B. Some individuals possess features that enable them to survive better than individuals lacking those features.
- C. More offspring are produced than can generally survive.
- D. Changes in an individual's genetic material are usually harmful.

Notice that in order to provide a single correct answer, the foils above required rewording when changed from negative to positive phrasing.

Last modified: Tuesday, December 6, 2016, 10:17 AM

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Improved Item

Which is a part of Darwin's Theory of Evolution by natural selection?

- A. There is almost no variance among individuals in a population.
- B. Some individuals possess features that enable them to survive better than individuals lacking those features.
- C. Less offspring are produced than can generally survive.
- D. Changes in an individual's genetic material are usually harmful.

[Next: "Of the following . . ."](#)

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"Of the following . . ."

"Of the following" should only be used when the best possible answer is not available as a foil. This question type is not used in Reading items.

Weak Item

Which of the following is an example of genetic engineering?

- A. growing a whole plant from a single cell
- B. finding the sequences of bases in plant DNA
- C. **inserting a gene into plants that makes them resistant to insects**
- D. attaching the root of one type of plant to the stem of another type of plant

Improved Item

Which choice is an example of genetic engineering?

- A. growing a whole plant from a single cell
- B. finding the sequences of bases in plant DNA
- C. **inserting a gene into plants that makes them resistant to insects**
- D. attaching the root of one type of plant to the stem of another type of plant

In the improved item above, "of the following" is simply removed from the stem because it is unnecessary. BUT "of the following" may be appropriate for certain items. Compare this item to one *with* and *without* the best possible answer (Fluorine):

Weak Item

Which of the following elements is the *most* electronegative?

- A. **Fluorine**
- B. Chlorine
- C. Carbon
- D. Sodium

Improved Item

Which of the following elements is the *most* electronegative?

- A. **Chlorine**
- B. Carbon
- C. Sodium
- D. Gold

In the weak item, "of the following" is not needed and should be removed from the stem because the best possible answer, fluorine, is available as a foil. In the improved item, the best possible answer, fluorine, is not made available. Therefore, "of the following" should be used to clarify that the focus of the item is the most electronegative element — *from those available*.

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Use Correct Language Conventions

- Use correct grammar, punctuation, and spelling.
- Make pronoun references clear.

Weak Item	Improved Item
Maria had 5 bags of marbles. Each bag had 12 marbles. She gave 2 of them to Joe. How many marbles did Maria have left? A. 60 B. 36 C. 24 D. 19	Maria had 5 bags of marbles. Each bag had 12 marbles. She gave 2 bags of marbles to Joe. How many marbles did Maria have left? A. 60 B. 36 C. 24 D. 19

In the weak item, it is unclear whether 2 of them refers to 2 marbles or 2 bags of marbles. An answer of 58 would also be reasonable for the weak item. The improved item makes it clearer that Maria is giving 24 marbles to Joe.

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Do Not Use Contractions or Abbreviations

Contractions and abbreviations limit accessibility for students who are English Learners and students with disabilities. Contractions and abbreviations are not used in formal writing.

For example, use

"I cannot see you" instead of "I can't see you."

"We will not go home" instead of "We won't go home."

"We will visit the United States" instead of "We will visit the U.S."

Contractions may be found in Reading items in which quotes from the selection are used. The contractions are used to match the wording of the selection and follow copyright permissions.

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Avoid Misleading Items and Clang Association

Weak Item

What is the state bird of North Carolina?

- A. Carolina wren
- B. seagull
- C. blue jay
- D. cardinal

Improved Item

What is the state bird of North Carolina?

- A. hummingbird
- B. seagull
- C. blue jay
- D. cardinal

In the weak item, Distractor A is misleading because it repeats a word in the stem. The use of "Carolina" in both the stem and the distractor may mislead students into selecting "A" as the correct answer. When foils have wording that resembles or is identical to the wording in the stem, it is referred to as **clang association**.

Weak Item

From what location was the Union Jack originally flown?

- A. the jack staff of a ship
- B. the roof of Buckingham Palace
- C. the top of the Big Ben clock
- D. the caboose on a train

Improved Item

From what location was the Union Jack originally flown?

- A. the staff at the rear of a ship
- B. the roof of Buckingham Palace
- C. the top of the Big Ben clock
- D. the caboose on a train

In the weak item, the use of "jack" in both the stem and the correct response may lead students to select "A" as the correct answer. In this example, the **clang association** helps the student who otherwise might not know the correct answer.

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Do Not Use Humor

Avoid the use of humor in the stem and foils. Humor may be distracting and is an accessibility concern for English Learners.

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Diversity

To reflect an awareness of the diversity of the student population:

- Use names from a variety of ethnic groups, such as José, Min, or Susie.
- Do not present stereotypical images of cultures, religions, ethnic groups, or gender groups. For example: "Girls do not like sports" or "Boys are better at math." Not all girls dislike sports, and not all boys are good at math.

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Considerations for Students with Disabilities

Organization

Consider how words, charts, and other visuals are arranged.

- Stems should begin with a sentence before any graphic or chart is presented.
- Graphics and charts should have a title.
- Avoid long stems by breaking up the sentences into list form (use bullets).
- Paragraph references should be placed as close to the end of the stem as possible.

Vocabulary

- Use the easiest, shortest words to convey the meaning.
- Avoid confusing names and unusual spellings.
- Use clear and concise language.
- Use short, common names from various cultures.

Sentence Structure

- Use simple sentences.
- Avoid complex sentences.
- Break ideas down into their simplest units.

Unusual Formats

- Try to be as clear and straightforward as possible.
- Could the arrangement confuse someone? Do the visuals make sense? Is there enough space around visuals so that they are easy to keep separate?

Use of Numbers and Letters in Responses

Be sure that it is clear which numbers and letters are part of the stem and which are part of the foils when using graphs or charts.

Specific things to remember:

- Avoid using the phrase "of the following." The phrase can be troublesome for students with disabilities, especially students who are deaf. Try to use "Which _____ is . . ." or "Which is . . ." rather than "Which of the following is . . ." or "Which of the following _____ is . . ."
- Avoid using the phrase "According to the chart . . ." A phrase such as "using the _____" should be used to direct the student to use a particular chart/graph when answering a question.
- Refer to a chart/graph that is included in an item. For example, use "Bob made this chart . . .".

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Considerations for Students Who Are English Learners

- Avoid words or phrases that do not have a clear translation: "get along."
- Avoid confusing student names: "April," "May," "June," "Paris," "Drew," etc.
- Avoid multimeaning words: "fair" (okay, just, light, good weather, State Fair), "make" (create, earn, brand of car, cause to happen, prepare).
- Avoid local and regional expressions such as "put down" (insult), "put up with" (preserve/endure), "put off" (delay), etc. These are colloquial and are deceptively easy to read but difficult to understand. If a student who is an English Learner were to look up each word separately in most bilingual dictionaries, he/she would not find an accurate definition of the term.
- Avoid verbs with two parts: "make up", "sit down", "take off", etc.
- Avoid using the passive voice, which can pose a challenge for English-learners. The passive voice means that the subject is a recipient of the verb's action. (The game of tag was played by Christopher and his friends.) Instead, use the active voice. The active voice means that a sentence has a subject that performs the action of the verb. (Christopher played tag in the playground.)

Weak item:

Tyrone made \$85 Monday. He made \$75 Tuesday.

How much money did he make altogether?

Improved item:

Tyrone earned \$85 Monday. He earned \$75 Tuesday.

How much money did he earn altogether?

In the weak item, the meaning of "made \$85" may be unclear to some students. Using "earned" instead of "made" is more precise and is easier for the student to understand.

What to avoid:

Generalizing Not all students who are English Learners are Spanish speakers.

Confusing student names "April," "May," "Drew," etc.

Complex sentences Several simple sentences are better.

Confusing modifiers "hardly" (hard/soft), "scarcely"

Contractions "would've," "could've," "should've," "didn't"

Sports references Sports vocabulary often includes common words with specialized meanings. The terminology is so much a part of our culture that we fail to recognize that an understanding of American sports is not universal. Some examples include: "home plate," "base hit," "ball," "strike," "foul ball," "strike out," "run," "pitcher," "fly ball," "back," "end," "out," "down," "rebound," etc.

Less common names for foods and flavors Rocky road, moose tracks, and cookies and cream may not be understood. Use common flavors instead – chocolate, vanilla, etc.

Misleading names for businesses Flying Pizza, Super Wheels, and Joe's Eats will be confusing. Use the words "restaurant," "company," "shop," "store," etc. whenever possible.

Implied understanding Example: the Constitution — which country's constitution?

Value judgments and customs Perceptions may depend on the student's customs and circumstances. Which is better — to earn a certain amount of interest in a savings account or to loan money to a family member? What clothing would be worn at 50 degrees Fahrenheit?

References to holidays and celebrations that may not be universal

Date and time Use the full names or proper abbreviations for days of the week and not just the first letters. When referencing time of day, specify a.m. or p.m.

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Content Guidelines

- Item writers must be knowledgeable in the content area for which they are writing.
- Items must be aligned to the North Carolina *Standard Course of Study* or North Carolina Essential Standards and written for the appropriate grade level or course.
- The vocabulary in the items and the reading level must be consistent either with the expected grade level or within a 1 or 2 grade level range of the students tested.
- Use content-specific words that are directly related to content the student is expected to know.
- Incorrect answer choices (distractors) must be plausible choices.
- Item writers must be familiar with common misconceptions and mistakes students may make and use these to create plausible distractors.

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Item Writing & General Guidelines Quiz

For review purposes, this quiz covers content presented in this topic. Trainees have unlimited attempts to complete this quiz. Once they score well enough, they will get a link that allows them to move to the next course topic.

ONLY click the Previous Page and Next Page buttons while in the quiz. **DO NOT** click the Previous or Next links at the bottom of the page until the quiz has been successfully completed.

Grading method: Highest grade

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Question 1

Not complete

Points out of 1.00

Flag question

Using the number designations in the example item below, answer the three questions.

Which is the state bird of North Carolina? (1)

- (6) {
- A. bluebird (2)
 - B. robin (3)
 - C. cardinal (4)
 - D. sparrow (5)

Which is the stem?

Which is the key?

Which are the foils?

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Question 2

Not complete

Points out of 1.00

Flag question

Which type of test item format presents [or has] only one correct response?

Select one:

- ☐ a. Rubric Format
- ☐ b. Best Answer Format
- ☐ c. General Format
- ☐ d. Depth of Knowledge Format

Check

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Question 3

Not complete

Points out of 1.00

Flag question

When can above-grade-level vocabulary be used in an item?

Select one:

- ☐ a. when it is appropriate to assess difficult content required by the standard
- ☐ b. when content language is used
- ☐ c. when students need to use complex reasoning strategies
- ☐ d. when students demonstrate advanced skills

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Question 4

Not complete

Points out of 1.00

Flag question

Where is the **best** place to put the central idea and any common elements?

Select one:

- ☐ a. in the foils
- ☐ b. close to the interrogative
- ☐ c. in the stem
- ☐ d. along with qualifying words

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Question 5

Not complete

Points out of 1.00

Flag question

Identify whether the words or phrases below are allowed or not allowed in foils.

none of the above Choose... ▼

I don't know Choose... ▼

always Choose... ▼

all of the above Choose... ▼

all but a and c Choose... ▼

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Question 6

Not complete

Points out of 1.00

Flag question

Why should the use of specific determiners in the foils be avoided?

Select one:

- ☐ a. They make the distractors confusing.
- ☐ b. They require italics when used.
- ☐ c. They are seldom the correct answer.
- ☐ d. They can create overlapping distractors.

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Question 7

Not complete

Points out of 1.00

Flag question

Why is it important to avoid "clang associations" when developing a multiple-choice item?

Select one:

- ☐ a. to prevent the use of implausible foils
- ☐ b. to avoid having overlapping foils
- ☐ c. to prevent revealing the answer to the question
- ☐ d. to avoid asking negative questions

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Finish attempt ...

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Fairness, Bias and Sensitivity

It is expected that groups of students with the same ability will have a similar probability of answering items correctly. Requiring specialized knowledge to answer a test item correctly is unfair.

Item development should ensure that industry standards for fairness, bias, and sensitivity are met so that the students, regardless of age, gender, disability, race, ethnicity, national origin, religion, linguistic background, or other characteristics (such as socioeconomic, regional, or cultural experiences), have equal opportunity for accessing the test items and that no child has an advantage or disadvantage because of the presentation or content of an item.

Items are reviewed for fairness, bias, and sensitivity before field testing. After field testing, statistical analysis of student performance with respect to gender, ethnicity, and socioeconomic background provides data to identify items for external bias review. If the review determines that an item is biased, it will be eliminated from the test item pool.

Bias is present in an item when

- an item measures membership in a group more than it measures content standards;
- an item contains information or ideas that are unique to the culture of one group or a particular socioeconomic background and are not part of the content standards;
- the item can be answered by a student who possesses certain background knowledge unrelated to the content standards.

Sensitivity issues occur when

- an item contains information that some students will find objectionable or will possibly produce a strong emotional response and/or is not part of the content standards such as blood, magic, snakes, spiders, death, etc.;
- an item contains contexts that students may be unfamiliar with because of cultural or socioeconomic reasons.

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Guidelines for Bias/Sensitivity in Item Writing

- Avoid stereotypical references such as those related to gender, age, race, ethnicity, religion, physical ability, or geographic location (e.g., use "firefighter" instead of "fireman").
- Avoid jargon, slang, buzz words, idioms, or clichés.
- Refer to ethnicity, marital status, or gender only when necessary.
- Consider carefully any references that may give an advantage or disadvantage to students depending on their geographic location. Include the reference only if part of the content standards; otherwise, examine for bias.
- Avoid language that may be considered demeaning and/or offensive.
- Avoid requiring knowledge of words, activities, or events that may be limited to a region of the state of certain regions of the country and words that carry different meanings in different regions (e.g., barbecue, toboggan, hoagie, and silo).
- Avoid references to holidays and personal events such as birthday parties.
- Avoid catastrophic environmental events such as hurricanes, tornadoes, forest fires, and floods if this information is not part of the content standards being assessed.
- Avoid words with multiple meanings (e.g., bark, rails, jam, pool, squash, park).

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Questions to Ask Before Submitting An Item

After having written a test item, it is important to reread what is written and ask each of these questions regarding fairness, bias, and sensitivity:

1. Does any element of the item contain any content that can result in a disadvantage for a student because of personal characteristics (such as race, gender, cultural background, or socioeconomic background)?
2. Does the language used in the item result in a disadvantage for a student because of personal characteristics?
3. Does the item contain language that is not commonly used statewide or has different connotations in different parts of the state or in different cultural or gender groups?
4. Does the item contain any local references that are not part of the content standards being assessed?
5. Does the item assume that all students come from the same socioeconomic background (e.g., suburban house with two-car garage)?
6. Is any element of the item presented in such a way as to offend a student because of personal characteristics?
7. Does the item have offensive, stereotyping, derogatory, or proselytizing religious references?
8. Does any element of the item contain language or content that reflects a stereotypical view of a group based on personal characteristics?
9. Does the item portray anyone in a stereotypical manner in regard to activities, occupations, emotions, etc.?

If the answer to any of the above questions is "yes," please revise the item and ask the questions again.

Once able to answer "no" to all of the above questions, ask these final two questions:

Fairness—Taken as a whole, is the item fair to all students, regardless of personal characteristics?

Diversity—Does the item appropriately include content that reflects a diverse population?

If the answer to these is "yes," then the item is ready to be submitted.

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Common Language

Items should only contain language that is commonly used. Do not use language that may have different meanings in different areas of the state, different regions of the country, or for different cultural or gender groups.

Examples

"toboggan" – may be reference either a sled or a hat

"pop" – can be referencing a soda or one's father or be used as a verb

"barbecue" – can be referencing an appliance used to cook food, a gathering at which food is cooked outdoors, or slow-cooked pork or beef that is pulled, chopped, or sliced

"dressing" – can be referencing a condiment for salads, a side item for an entree, or various materials used to cover a wound

"raining clams" – phrase used when sea gulls pick up and drop clams to try to crack them open; only people in the coastal/tidewater areas would know what this means

Last modified: Monday, April 1, 2019, 8:58 AM

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Avoid Stereotypes

Items should avoid portraying anyone in a stereotypical manner, including his or her activities, occupations, or emotions. Remember that even positive stereotypes are still stereotypes.

Last modified: Friday, March 3, 2017, 8:42 AM

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Avoid Offensive Content

Items must not contain any stereotypical, derogatory, or proselytizing references. However, items should maintain historical, scientific, or literary integrity.

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Socioeconomic/Family Sensitivity

Items should not assume that all students come from the same socioeconomic or family background.

Last modified: Tuesday, December 6, 2016, 9:39 AM

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Artwork

Artwork should be used only when needed to respond to the item and should conform to the bias/sensitivity guidelines previously discussed. Artwork should adequately reflect the diversity of the student population.

Last modified: Friday, March 3, 2017, 8:29 AM

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Security and Copyrights

The North Carolina Testing Program consists of high-stakes assessments used to report student achievement at the school, district, state, and federal levels. Security must be maintained at all times, from the initial stages of test development (item writing) to the final delivery of the assessment (test administration). Compromised security of a single item on a test form invalidates the entire form, resulting in a significant financial loss for the state of North Carolina.

All items written and submitted for use in the North Carolina Testing Program are secure property of the state of North Carolina, regardless of whether the item is actually used on an assessment. Contracted item writers and reviewers for the North Carolina Testing Program must thoroughly understand and sign the [Test Security Agreement](#), which affirms compliance with the North Carolina *Testing Code of Ethics* (16 NCAC 6D .0306).

There will be a brief quiz at the completion of this topic.

Last modified: Tuesday, June 23, 2020, 9:09 AM

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About the Testing Code of Ethics

The North Carolina *Testing Code of Ethics* (16 NCAC 6D .0306) is a codified security policy relating to the North Carolina Testing Program. Items written and submitted to the North Carolina Testing Program are subject to all aspects of the *Testing Code of Ethics* and must not be shared with anyone for any reason. The items are the sole property of the North Carolina Testing Program and thus security violations are considered violations of the *Testing Code of Ethics*. All contracted item writers and reviewers must sign the *Test Security Agreement* form before beginning contractual services.

Last modified: Tuesday, June 23, 2020, 9:11 AM

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North Carolina Testing Code of Ethics

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Testing Code of Ethics

Introduction

In North Carolina, standardized testing is an integral part of the educational experience of all students. When properly administered and interpreted, test results provide an independent, uniform source of reliable and valid information, which enables:

- *students* to know the extent to which they have mastered expected knowledge and skills and how they compare to others;
- *parents* to know if their children are acquiring the knowledge and skills needed to succeed in a highly competitive job market;
- *teachers* to know if their students have mastered grade-level knowledge and skills in the curriculum and, if not, what weaknesses need to be addressed;
- *community leaders and lawmakers* to know if students in North Carolina schools are improving their performance over time and how the students compare with students from other states or the nation; and
- *citizens* to assess the performance of the public schools.

Testing should be conducted in a fair and ethical manner, which includes:

Security

- assuring adequate security of the testing materials before, during, and after testing and during scoring
- assuring student confidentiality

Preparation

- teaching the tested curriculum and test-preparation skills
- training staff in appropriate testing practices and procedures
- providing an appropriate atmosphere

Administration

- developing a local policy for the implementation of fair and ethical testing practices and for resolving questions concerning those practices
- assuring that all students who should be tested are tested
- utilizing tests which are developmentally appropriate
- utilizing tests only for the purposes for which they were designed

Scoring, Analysis and Reporting


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Test Security Agreement

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DEPARTMENT OF PUBLIC INSTRUCTION | Mark Johnson, Superintendent of Public Instruction
WWW.NCPUBLICSCHOOLS.ORG

TEST SECURITY AGREEMENT
2018 – 2019

North Carolina State Department of Public Instruction
Division of Accountability – Test Development Section

All North Carolina test materials are the property of the North Carolina Department of Public Instruction (NCDPI). North Carolina test materials must remain secure at all times.

In order to insure test security, I understand that I am not to discuss/share information relating to the test, the testing process, or test scoring. This restriction applies to discussion with the media, including, but not limited to, print and television media. I agree to refer any and all questions from the media to the appropriate NCDPI project coordinator.

I agree not to publish any educational testing or scoring material or share this material outside of the secure work site. Any knowledge or experience gained during this process is not to be discussed, shared, or likewise published in any form during or after the completion of the project. I realize that testing and scoring materials are secure and must not be taken from the work site or photocopied at anytime unless the removal is specifically approved by the Department of Public Instruction leadership.

I agree that I will not generate/produce products (test selections, compositions, prompts, items, tasks, reviews, etc.) while I am on duty at my regular employer/employee duty station.

In the event of a violation of this agreement I understand that the State of North Carolina, in accordance with the contested case provisions of [Chapter 150B](#) of the General Statutes, may impose any one or more of the following sanctions:

- 1) file a civil action against the person or persons responsible for the violation
- 2) seek criminal prosecution of the person or persons responsible for the violation
- 3) in accordance with the provisions of [16 NCAC 6C.0312](#), suspend or revoke the professional license of the person or persons responsible for the violation.

By signing below, I am acknowledging that I have read and understand the consequences of violating the security of North Carolina tests


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Ownership of Items Authored

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 **PUBLIC SCHOOLS OF NORTH CAROLINA**
DEPARTMENT OF PUBLIC INSTRUCTION | Mark Johnson, Superintendent of Public Instruction
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ORIGINAL WORK AND TEST SECURITY AGREEMENT
2018-2019

North Carolina State Department of Public Instruction (NCDPI)
Division of Accountability – Test Development Section

In order to ensure the integrity and legality of the educational test product (reading selections, compositions, items, prompts, tasks, reviews, scoring materials, etc.) submitted for use in the North Carolina Testing Program, I guarantee that I am the creator and proprietor of all rights in and to all test materials I submit to the North Carolina Department of Public Instruction (NCDPI) or to the Center for Urban Affairs and Community Services, North Carolina State University. I understand that submitting test materials that have been published previously is a violation of copyright law. In signing this form, I guarantee that I have not submitted and will not submit a test product to the North Carolina Testing Program from any outside source including classroom materials, textbooks, or other curriculum materials, and I will not submit to any other state, federal, or private vendor.

I assign to the NCDPI all my right, title, and interest including the copyright of the test products and all renewals and extensions of the copyright that may be secured under the laws of the United States of America and any other countries, as such may now or later be in effect. I agree to cooperate with NCDPI and to execute and deliver all papers as may be necessary to vest all rights to the test product.

In addition, I acknowledge and agree that the submitted test product (and all rights therein, including, without limitations, copyright) belongs to and shall be the sole and exclusive property of the NCDPI and is considered to be secure test materials. As such, it may not be used for classroom instruction or assessment purposes except as directed by the North Carolina Testing Program.

I agree not to publish any testing or scoring product or share this product outside of the secure work site. Any knowledge or experience gained during this process for which I have been hired is not to be discussed, shared or likewise published in any form during or after the project. I realize that testing and scoring materials are secure and must not be taken from the work site or photocopied at anytime unless specifically instructed by a supervisor. This restriction applies to discussion with the media, including, but not limited to, print, and television media. I agree to refer any and all questions from the media to the appropriate NCDPI project coordinator.

I agree that I will not generate/produce any educational test product (reading selections, compositions, items, prompts, tasks, reviews, scoring materials, etc.) while I am on duty at my regular employee work station.

In the event of a violation of this agreement I understand that the State of North Carolina, in accordance with the contested case provisions of [Chapter 150B](#) of the General Statutes, may impose any one or more of the following sanctions:

- 1) file a civil action against the person or persons responsible for the violation
- 2) seek criminal prosecution of the person or persons responsible for the violation
- 3) in accordance with the provisions of [16 NCAC 6C-0312](#), suspend or revoke the professional license of the person or persons responsible for the violation.

By signing below, I am acknowledging that I have read and understand the *Original Work and Test Security Agreement*; and that I have full power to enter this agreement.

Author's/Writer's Signature: _____

Items authored and submitted to fulfill a contractual agreement in support of the North Carolina Testing Program are required to be original works and become secure test materials and the property of the North Carolina Department of Public Instruction.

Once an item writer has submitted an item, that item or even a close facsimile of that item cannot be used for instruction or for any other purpose.

In order to ensure the integrity and legality of the educational test product (reading selections, new items, prompts, tasks, item reviews, etc.) submitted for use in the North Carolina Testing Program, item writers must guarantee that they are the creator of all test materials they submit.

Item writers must agree that they understand that submitting test materials that have been published previously is a violation of copyright law. Item writers guarantee that they will not submit a test product to the North Carolina Testing Program from any outside source, including classroom materials, textbooks, or other curriculum materials.

In addition, item writers must acknowledge and agree that the submitted test product (and all rights therein, including, without limitation, copyright) belongs to and shall be the sole and exclusive property of the North Carolina Department of Public Instruction and is considered to be secure test material. As such, it may not be used for classroom instruction or assessment purposes except as directed by the North Carolina Testing Program.

Item writers must agree not to publish any testing or scoring product or share this product. Any knowledge or experience gained during this process for which the writer has been hired is not to be discussed, shared, or likewise published in any form.

If you are hired as an item writer, you will be required to read and sign an Original Work and Test Security Agreement form. When you have finished reviewing the Original Work and Test Security Agreement form, move to the next course resource (click next).

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Avoid Trademarks

A trademark includes any word, name, symbol, device, or any combination thereof used, or intended to be used, in commerce to identify and distinguish the goods of one manufacturer or seller from goods manufactured or sold by others and to indicate the source of the goods. In short, a trademark is a brand name.

Because trademarks are brand names, avoid using them in any test items you write.

For example, use:

"tissue" instead of "Kleenex®"

"soda" instead of "Coca-Cola®"

"hamburger" instead of "Big Mac®"

"truck" instead of "Ford F-150®"

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Work Site Security Issues

Item writers must take special care when using computing systems to author items. The use of computers to draft items is encouraged as long as security can be maintained. Drafting items before submitting their final versions using the online Test Development System (TDS) is preferred and sometimes is required. If using a computer to create draft versions of items, the source files that contain the drafts and final work must be kept secure.

When drafting items, either on a computer or on a pad of paper, consider who is able to observe the work. A spouse, friend, child, or coworker must not be able to observe the work or access the drafts on a shared computer. Only the writer should have access to these secure files.

It is best to store these files in a removable storage device such as a disk or flash/USB drive. This allows one to draft items on a computer and store notes about the work, while saving the information where others cannot access it.

Any notes or items stored either on paper or electronically **MUST** be shredded or deleted upon completion of a contract.

If it is suspected that items that the item writers have authored or reviewed may have been compromised by unauthorized access, they **MUST IMMEDIATELY** contact the Help Desk (ncdesk@ncsu.edu or 919-515-1320 and provide details of the potential security breach.

Last modified: Friday, March 3, 2017, 8:34 AM

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Security and Copyrights Quiz

For review purposes, this quiz covers content presented in this topic. Trainees have unlimited attempts to complete this quiz. Once successfully completed a link will allow the trainee to move to the next course topic.

Grading method: Highest grade

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Question 1

Not yet answered

Points out of 1.00

Flag question

Which **best** describes items written and submitted to the North Carolina state testing program?

Select one:

- ☐ a. specially ordered or commissioned work
- ☐ b. original work that is property of the North Carolina Department of Public Instruction
- ☐ c. original work created for educational purposes
- ☐ d. original work in joint ownership between the author and the North Carolina Department of Public Instruction

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Question 2

Not yet answered

Points out of 1.00

Flag question

What **must** be done to notes and drafts when an item writer has completed an assignment?

Select one:

- ☐ a. keep them in a secure location
- ☐ b. shred or delete all files
- ☐ c. mail them to the content contact
- ☐ d. make copies for instruction

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Question 3

Not yet answered

Points out of 1.00

Flag question

Items authored and submitted are considered secure test materials.

Select one:

- ☐ True
- ☐ False

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Question 4

Not yet answered

Points out of 1.00

Flag question

Under what circumstances is using a computer to draft items acceptable?

Select one:

- ☐ a. when the computer used is located at a school or place of work
- ☐ b. when a computer is in a public place
- ☐ c. when users have a shared account
- ☐ d. when files can be kept secure and work cannot be accessed or observed by others

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Question 5

Not yet answered

Points out of 1.00

Flag question

Item writers should make and keep copies of items written after completion of the contract.

Select one:

- ☐ True
- ☐ False

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TD101B2: Webb's Depth of Knowledge (DOK)

TD101B2: Webb's Depth of Knowledge (DOK)

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Introduction












This course is designed for anyone interested in learning how to write and review assessment items for the North Carolina Testing Program based on the North Carolina *Standard Course of Study* and North Carolina Essential Standards.

In order to provide more rigor and increase the higher-order thinking skills required for student success, the North Carolina Department of Public Instruction adopted frameworks for identifying cognitive demand.

The North Carolina Testing Program requires items written to be tagged with the appropriate cognitive load designation that has been modeled to each standard. Because of different thinking skill taxonomies that were desired by the department at the time standards were revised, some standards have learning resources and test items tagged to Webb's Depth of Knowledge (DOK), others are tagged to Revised Bloom's Taxonomy (RBT), while even others are tagged to Marzano's Thinking Skills (TS). Whichever case is required for the standard, item writers and reviewers need to have a basic understanding of the taxonomies that are covered for the standards that they are writing to or reviewing.

This self-directed course should take approximately thirty (30) minutes to complete. Upon successful completion, enrollment keys for the associated subjects/standards are provided.

Webb's Depth-of-Knowledge (DOK)

-  [Introduction to Webb's Depth of Knowledge](#)
-  [Webb's Depth of Knowledge \(DOK\) Levels Chart](#)
-  [Level 1 - Recall and Reproduction](#)
-  [Level 1 - Recall and Reproduction - Example Items](#)
-  [Level 2 - Skills and Concepts](#)
-  [Level 2 - Skills and Concepts - Example Items](#)
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-  [Next Steps](#)

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Webb's Depth of Knowledge

This section of the tutorial provides an overview of Webb's Depth of Knowledge (DOK). According to Webb's alignment model, the test questions developed need to agree with the standards in terms of content and DOK. Each item has been classified into one of three DOK levels; item writers are tasked with writing test questions that match each standard in content and to a DOK level. The document posted in this section of the tutorial will provide definitions and examples of each DOK level.

Read the overview of Webb's DOK alignment model, study the example items provided, and take the quiz to check for understanding.

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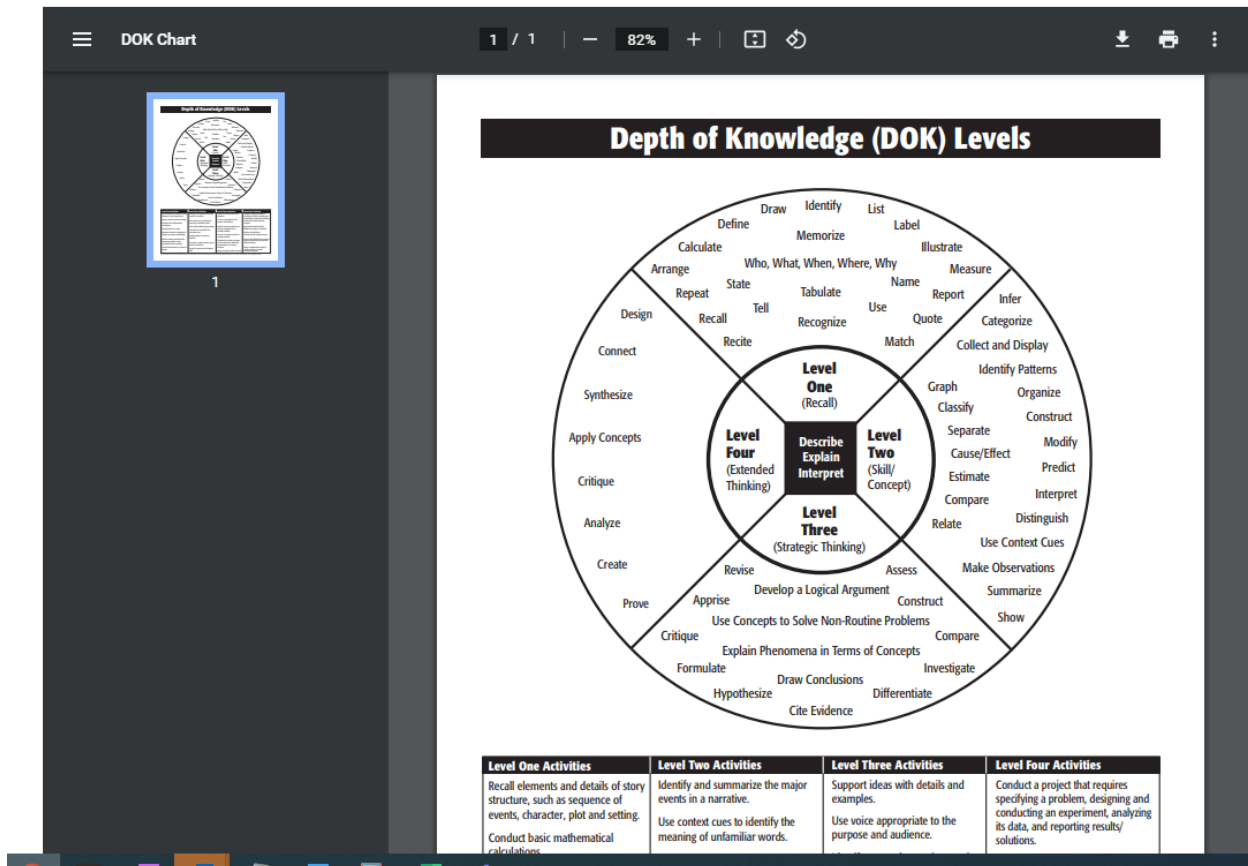
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TD101B2: Webb's Depth of Knowledge (DOK)

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Webb's Depth of Knowledge (DOK) Levels Chart



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Level 1 - Recall and Reproduction

Level 1 - Recall and Reproduction:

- includes the recall of information, such as a fact, definition, term, or a simple procedure
- recounts information specifically stated in a text
- conducts basic mathematical calculations, such as a one-step, well-defined, and straight algorithmic procedure
- includes key words such as "identify," "recall," "recognize," "use," and "measure."
- demonstrates a rote response, performs a well-known algorithm, follows a set procedure, or performs a clearly defined set of steps

Note: Reading assessments only include Level 1 items in elementary grade levels.

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Level 1 - Recall and Reproduction - Example Items

Level 1 Item Example for Math

From any vertex of a 4-sided polygon, 1 diagonal can be drawn.

From any vertex of a 5-sided polygon, 2 diagonals can be drawn.

From any vertex of a 6-sided polygon, 3 diagonals can be drawn.

From any vertex of a 7-sided polygon, 4 diagonals can be drawn.

How many diagonals can be drawn from any vertex of a 20-sided polygon?

Explanation: The first thing to note is that this is not really a geometry item. Rather, it simply requires students to notice an easy, routine pattern. DOK levels are difficult to assign for many pattern-recognition problems, because they depend on how routine the pattern is. This particular pattern is immediately recognizable and requires no processing, but a more complex pattern could make this item Level 2 or even Level 3.

Level 1 Item Example for ELA

When Lisa and Henry walked into the cave, they were surprised to see how bright it was. Light from a large crack in the ceiling made the water flowing through the trough in the floor shine. Lisa reached down to touch it, but Henry stopped her...

Why was Lisa able to see the water in the cave?

Explanation: Despite not being a word-for-word item, the answer is found directly in the text. There is no interpretation required to answer the item.

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Level 2 - Skills and Concepts

Level 2 Skills and Concepts:

- includes the engagement of some mental processing beyond a habitual response
- requires students to contrast or compare people, places, events and concepts; analyze meaning of events in a text
- describe or explain issues and problems, patterns, cause and effect, significance or impact, relationships, points of view or processes
- requires students to make some decisions as to how to approach the problem
- includes words such as "classify," "organize," "estimate," "make observations," "collect and display data," and "compare data" (These actions imply more than one step. For example, to compare data requires first identifying characteristics of objects or phenomena and then grouping or ordering the objects.)
- includes some action verbs, such as "explain," "describe," or "interpret" (For example, interpreting information from a simple graph, or reading information from the graph, also are at Level 2.)
- includes activities such as noticing or describing nontrivial patterns; explaining the purpose and use of experimental procedures; carrying out experimental procedures; making observations and collecting data; classifying, organizing, and comparing data; and organizing and displaying data in tables, graphs, and charts

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Level 2 - Skills and Concepts - Example Items

Level 2 Item Example for Math

A triangle has 0 diagonals, a quadrilateral has 2 diagonals, a pentagon has 5 diagonals, and a hexagon has 9 diagonals. If the pattern continues, how many diagonals will an octagon have?

- A 11
- B 14
- C 18
- D 20

Explanation: Pattern recognition is required to solve this item, but the nonroutine nature of this pattern brings this up to a higher DOK level. Some analysis and generalization is required in order to understand and extend this pattern.

Level 2 Item Example for ELA

There are three main points of focus when learning to take a beautiful photograph. These are aperture, shutter speed, and ISO. No one aspect is more important than the others, but photographers will often make one a priority, depending on the subject of the photo. For example, in sports, shutter speed is of special interest to photographers...

Why is it important for photographers to understand all three elements of photography before taking pictures?

Explanation: This item requires the student to take the information from the text and apply it to the item.

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Level 3 - Strategic Thinking

Level 3 Strategic Thinking:

- requires reasoning, planning, using evidence, and a higher level of thinking than the previous two levels
- requires students to explain their thinking
- requires students to make conjectures
- requires cognitive demands to be complex and abstract
- requires more demanding reasoning
- includes drawing conclusions from observations; citing evidence and developing a logical argument for concepts; explaining phenomena in terms of concepts; and deciding which concepts to apply in order to solve a complex problem
- includes interpreting information from a complex graph that requires some decisions on what features of the graph need to be considered and how information from the graph can be aggregated

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Level 3 - Strategic Thinking - Example Items

Level 3 Item Example for Math

$$S = wx + y/z.$$

If $0 < w < x < y < z$ in the equation above, then the greatest increase in S would result from adding 1 to the value of which variable?

- A w
- B x
- C y
- D z

Explanation: If a multiple-choice item is Level 3, often it is because the multiple choices do not constrain or guide the possible solutions. The choices here allow for all possible responses to this item.

Level 3 Item Example for ELA

There is much controversy surrounding the topic of indoor/outdoor cats. Allowing cats to run loose poses a grave risk to the songbird population. That being said, a strong feline presence in one's yard can keep a garage (and the house!) free from mice. However, while there are valuable points on both sides, one indisputable fact remains: even the strongest, fiercest cat is no match for passing cars, big dogs, and other dangers.

Which quote from the text supports the author's claim that pet cats should be kept indoors?

Explanation: In this item, the student needs to decide which parts of the text are appropriate to the item. This is especially important when there is information from both sides of a topic.

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Level 4 - Extended Thinking

Level 4 Extended Thinking:

- requires complex reasoning, planning, developing, and thinking, most likely over an extended period of time
- requires taking into consideration a number of variables when doing a study
- requires the cognitive demands of the task to be high and the work very complex
- requires students to make several connections—relate ideas within the content area or among content areas—and to select one approach among many alternatives on how the situation should be solved
- includes activities such as designing and conducting experiments and projects; developing and proving conjectures; making connections between a finding and related concepts and phenomena; combining and synthesizing ideas into new concepts; and critiquing experimental designs

Level 4 Extended Thinking cannot be reached in traditional standardized testing. This level requires long term assignments/projects that are great for classroom use. A feedback and revision process is a key component of Level 4. As a result, Level 4 Extended Thinking items do not appear on North Carolina EOG or EOC assessments.

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Level 4 - Extended Thinking - Example Items

Level 4 Item Example for Math

Sam, Tetsuo, and Kim each own some baseball cards that Ted is willing to trade them for. Here is what they are worth:

Sam's Cards: Boone - \$0.80, Galarraaga - \$0.40, McGee - \$1.50

Tetsuo's Cards: Smith - \$1.30, Jones - \$1.00

Kim's Cards: Johnson - \$0.70, Carter - \$2.20

Ted will trade his Wilson card for \$6.75 worth of cards. What is the best trade that Sam, Tetsuo, and Kim can make for Ted's Wilson card?

What trade could Sam, Tetsuo, and Kim offer Ted that would be the most fair between Sam, Tetsuo, and Kim? Explain your thinking and show all your work.

Explanation: This is a complex, open-ended problem requiring students "to make several connections and apply one approach among many." It requires the students to plan and organize, and to weigh solutions based on different kinds of criteria. Students should be allowed an extended period of time to complete this item.

Level 4 Item Example for ELA

A term paper that requires students to complete the tasks of reviewing, critiquing, and rewriting.

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Quiz

This quiz will assess understanding of Depth of Knowledge (DOK) levels. In order to be an item writer or reviewer a minimum score of 80% is required and an unlimited number of attempts to achieve the minimum score.

Click **ONLY** the Previous Page and Next Page buttons while in the quiz. **DO NOT** click the Previous or Next links at the bottom of the page until having successfully completed the quiz.

Grading method: Highest grade


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Question 1

Not yet answered

Points out of 1.00

 Flag question

What depth-of-knowledge (DOK) level requires the simple recall of information such as a fact, definition, term, or simple procedure?

Select one:

- ☐ a. DOK 1
- ☐ b. DOK 2
- ☐ c. DOK 3
- ☐ d. DOK 4

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Question 2

Answer saved

Points out of 1.00

Flag question

- What depth-of-knowledge (DOK) level includes recounting explicit information or performing a well-known algorithm?

Select one:

- ☒ a. DOK 1
- ☐ b. DOK 2
- ☐ c. DOK 3
- ☐ d. DOK 4

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Question 3

Not yet answered

Points out of 1.00

Flag question

What depth-of-knowledge (DOK) level cannot be reached using multiple choice items?

Select one:

- ☐ a. DOK 1
- ☐ b. DOK 2
- ☐ c. DOK 3
- ☐ d. DOK 4

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Question 4

Not yet answered

Points out of 1.00

Flag question

What depth-of-knowledge (DOK) level requires students to analyze a text or make some decisions as to how to approach a problem or activity?

Select one:

- ☐ a. DOK 1
- ☐ b. DOK 2
- ☐ c. DOK 3
- ☐ d. DOK 4

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Question 5

Not yet answered

Points out of 1.00

Flag question

What depth-of-knowledge (DOK) level requires students to support information given in a text or take more than one step to solve a problem, such as when they are asked to compare data?

Select one:

- ☐ a. DOK 1
- ☐ b. DOK 2
- ☐ c. DOK 3
- ☐ d. DOK 4

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Question 6

Not yet answered

Points out of 1.00

Flag question

What depth-of-knowledge (DOK) level requires students to make conjectures about validity of claims or use higher level thinking to solve non-routine problems?

Select one:

- ☐ a. DOK 1
- ☐ b. DOK 2
- ☐ c. DOK 3
- ☐ d. DOK 4

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Question 7

Not yet answered

Points out of 1.00

Flag question

What depth-of-knowledge (DOK) level requires students to analyze the effect of point of view or reason, plan, and use evidence when problem solving?

Select one:

- ☐ a. DOK 1
- ☐ b. DOK 2
- ☐ c. DOK 3
- ☐ d. DOK 4

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Quiz

This quiz will assess understanding of Depth of Knowledge (DOK) levels. In order to be an item writer or reviewer a minimum score of 80% is required and an unlimited number of attempts to achieve the minimum score.

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Grading method: Highest grade

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Next Steps

Continue training by selecting the course that relates to concepts found in the DOK:

[TD101C1_ELA: English Language Arts Standards Grade 3-8](#)

[TD101C2 ELA: English Language Arts Standards High School](#)

[TD101C1_MAT: NC Math Standards Grades 3-8](#)

[TD101C2 MAT: NC Math Standards High School](#)

Use the enrollment key "webb" to self-enroll in the course.

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Language and Assessment

- Language is an essential part of any assessment.
- While rich language can make assessment more interesting for some students, it can also cause confusion and misunderstanding for others.
- Jamal Abedi, a leading researcher in the assessment of English Learner (EL) students, points out “. . . It is of paramount importance to distinguish between language that is a natural part of an assessment and the language that is unrelated to the assessment process” (Elliot, Ryan, Beddow & Kurtz, 2011, p. 219).

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What is Plain English in Assessment?

- Plain English is a viable, research-supported process for helping to reduce the complexity of language on an assessment in order to improve clarity without altering the constructs targeted for measurement.
- Plain English improves accessibility for EL students and non-EL students who are not proficient in English Language Arts.

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Accessibility in Assessment

- Accessibility refers to “. . . the degree to which a test and its constituent item set permit the test taker to demonstrate knowledge of the target construct of a test” (Beddow et al., 2010, p. 2).
- Unnecessary and complex language may affect the overall accessibility of an assessment.

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Why Use Plain English in Assessment?

- Assessments should provide valid and reliable information about what students know and can do.
- Research on the assessment of EL students clearly and consistently shows a large performance gap between EL and non-EL students in all content areas.
- There is no evidence to suggest that EL students have less ability to learn than non-EL students.
- Legislation requires fair assessment and accountability for all students.
- Section 1005 of the Every Student Succeeds Act (ESSA) of 2015 instructs states to implement high-quality assessments that shall “be developed, to the extent practicable, using the principles of universal design for learning.”
- In other words, North Carolina's assessments should be designed so that its students can access and understand them to the greatest extent possible.
- Variables such as linguistic and cultural biases may be responsible for performance gaps.

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Plain English Strategies

- The following slides list the linguistic features on assessments that research has shown to have an effect on the performance of EL students along with Plain English strategies for addressing them.
- These strategies are **NOT** strict rules. It is always important to first consider whether the language used in an item is relevant to the construct being measured.

Linguistic Feature	Plain English Strategies	Examples
Unfamiliar words	Use simple, high-frequency words. Exception: vocabulary directly related to the content students are expected to know Use generic terms and contexts familiar to diverse backgrounds.	Ex. Use the word dog instead of canine. Ex. Use the word tree instead of oak. Ex. Use "grocery store" instead of "Food Lion"
Words/phrases that do not have a clear translation	Avoid verbs that consist of two words and idioms. Avoid words with multiple meanings.	Ex. Use the word cancel instead of call off. Ex. Use the phrase "It's too late" instead of "You missed the boat."

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Synonyms and Pronouns

Linguistic Feature	Plain English Strategy	Examples
Overuse of Synonyms	Use the same word to describe a single concept or thing in an item.	Ex. Synonyms like table, chart, and matrix should not be used to describe the same thing in an item.
Overuse of Pronouns	Use pronouns when the noun they are used to replace is in close proximity.	Ex. "Maria had 10 marbles in a bag. It weighed 1 pound. Then she added some more until it weighed two pounds." vs. "Maria had 10 marbles in a bag. The bag weighed 1 pound. Then, she added more marbles until the bag weighed 2 pounds."

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Linguistic Feature	Plain English Strategy	Examples
Negation Sentences containing negations (e.g., no, not, none, never) are harder to comprehend than affirmative sentences.	Use affirmative statements when appropriate.	Ex. "Jane is gone." vs. "Jane is not here."
Long Noun Phrases	Only include adjectives that are essential to an item.	Ex. "A loaded tractor-trailer truck weighs..." vs. "A loaded truck weighs . . ."

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Verb Tense and Passive Voice

Linguistic Feature	Plain English Strategy	Examples
Verb Tense	Use simple present tense when appropriate. The present tense is easiest to understand.	Ex. "Aaron goes to the store." vs. "Aaron is going to the store."
Passive Voice The Passive voice occurs when the subject of a sentence is the recipient of the verb's action.	Use the active voice. The active occurs when a sentence has a subject that acts on its verb. It is easier for readers to understand.	Ex. "The dog chased the squirrel." vs. "The squirrel was chased by the dog."

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Sentence Length

Linguistic Feature	Plain English Strategies	Examples
Sentence Length Longer sentences tend to be complex and harder to understand.	Break long sentences into shorter ones. Remove unnecessary detail. Use bullets to list an item's details. This is especially helpful in math and science.	Ex. "There are 136 students in a school cafeteria. There are 8 students sitting at each table." vs. "There are 136 students eating lunch in an elementary school cafeteria with 8 students sitting at each table."

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Complex Sentence Structure

Linguistic Feature	Plain English Strategies	Examples/Recommendations
Complex sentence structure Complex sentences tend to be more difficult to understand than simple and compound sentences.	Use a subject-verb-object sentence structure for statements. Begin questions with a question word. Use present tense and the active voice. Avoid starting a question with a dependent clause. Avoid "if" statements. Use multiple short sentences vs. one long sentence.	Ex. "Evan delivers the newspaper to 100 people a day. How many people does Evan deliver the newspaper to in 5 days?" vs. "If Evan delivers the newspaper to 100 people a day, how many people does Evan deliver to in 5 days?" Ex. "What does 'hold your horses' mean in paragraph 4?" vs. "In the selection, what is meant by the phrase 'hold your horses'?"

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Construct and Complexity

- Questions to consider when applying Plain English strategies:
 - What are the skills and content targeted for measurement?
 - What is the level of cognitive complexity that needs to be assessed

* An item's targeted construct and its cognitive complexity should not be altered. Plain English strategies are designed to simplify the wording of an item without altering the construct and complexity required in the standards.

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Sample Item 1

Sample Item - Math, Grade 3

<p>ORIGINAL VERSION</p> <p>Sam walks 4 miles a day. His goal is to walk 36 miles. After 6 days, how many miles does Sam have left to accomplish his goal? Which equation below represents this problem?</p> <p>A) $3 \times 5 + n = 36$</p> <p>B) $4 \times 6 + n = 36$</p> <p>C) $4 \times 6 \times n = 36$</p> <p>D) $9 \times 4 + n = 36$</p>	<p>Standard 3.OA.8: Solve two-step problems using addition, subtraction, and multiplication, representing problems using equations with a symbol for the unknown number.</p> <p>Cognitive Complexity: Skill/Concept (DOK)</p>
--	---

Accessibility Issues:

- The third sentence has a complex structure: "After 6 days, how many miles does Sam have left to accomplish his goal?"
- The third sentence also uses a word that could be unfamiliar to some students: "accomplish."
- The item asks two questions.

<p>IMPROVED VERSION</p> <p>Sam's goal is to walk 36 miles.</p> <ul style="list-style-type: none">• He walks 4 miles each day.• He has walked for 6 days. <p>Which equation can be used to find how many more miles Sam needs to walk to reach his goal?</p> <p>A) $3 \times 5 + n = 36$</p> <p>B) $4 \times 6 + n = 36$</p> <p>C) $4 \times 6 \times n = 36$</p> <p>D) $9 \times 4 + n = 36$</p>	<p>Standard 3.OA.8: Solve two-step problems using addition, subtraction, and multiplication, representing problems using equations with a symbol for the unknown number.</p> <p>Cognitive Complexity: Skill/Concept (DOK)</p>
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Plain English Strategies:

- "Accomplish" is replaced with an easier word ("reach").
- Bullets are used to list an item's details.
- Item uses multiple short sentences.
- Sentences follow a subject-verb-object structure.

*Note: Alignment to the standard and cognitive complexity did not change.

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Sample Item 2

Sample Item - Math, Grade 3

<p>ORIGINAL VERSION</p> <p>Logan is setting up a produce stand. Each basket can hold a maximum of 6 plums. If he has 348 plums, what is the fewest number plum baskets Logan can prepare and still use all the plums?</p> <p>A) 56</p> <p>B) 57</p> <p>C) 58</p> <p>D) 59</p>	<p>Standard 4.NBT.6: Find whole number quotients and remainders with up to three-digit dividends and one-digit divisors with place-value understanding using rectangular arrays, area models, repeated subtraction, partial quotients, properties of operations, and/or the relationship between multiplication and division.</p> <p>Cognitive Complexity: Recall</p>
---	---

Accessibility Issues:

- The first sentence has a verb consisting of two words: "setting up."
- Item contains words with multiple meanings: "stand" and "produce."
- "Maximum" might be an unfamiliar word (grade 6).
- The question has a complex sentence structure: "If he has 348 plums..."

<p>IMPROVED VERSION</p> <p>A farmer has 348 apples, and he wants to put them into baskets. He will put 6 apples into each basket. How many baskets will the farmer use?</p> <p>A) 56</p> <p>B) 57</p> <p>C) 58</p> <p>D) 59</p>	<p>Standard 4.NBT.6: Find whole number quotients and remainders with up to three-digit dividends and one-digit divisors with place-value understanding using rectangular arrays, area models, repeated subtraction, partial quotients, properties of operations, and/or the relationship between multiplication and division.</p> <p>Cognitive Complexity: Recall (DOK)</p>
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Plain English Strategies:

- Item was edited to avoid using a verb consisting of two words, words with multiple meanings, and unfamiliar words.
- Sentences follow a subject-verb-object structure.
- The question starts with a question word.

*Note: Alignment to the standard and cognitive complexity did not change.

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Sample Item 3

Sample Item - Science, Grade 5

<p>ORIGINAL VERSION</p> <p>A food chain in an ecosystem includes blueberry bushes, rabbits, and owls.</p> <ul style="list-style-type: none">• The rabbits eat the blueberry bushes.• The owls eat the rabbits. <p>If the population of owls decreases, how will this affect the population of blueberry bushes?</p>	<p>Standard 5.L.2.3: Infer the effects that may result from the interconnected relationship of plants and animals to their ecosystem.</p> <p>Cognitive Complexity: Understanding/Conceptual (Bloom's)</p>
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Accessibility Issues:

- Item contains unnecessary detail ("blueberry") and is wordy.
- The question has a complex sentence structure: "If the population of owls decreases..."

<p>IMPROVED VERSION</p> <p>This shows a food chain.</p> <p>bush → rabbit → owl</p> <p>The population of owls decreases in the food chain. What will most likely happen to the population of bushes?</p>	<p>Standard 5.L.2.3: Infer the effects that may result from the interconnected relationship of plants and animals to their ecosystem.</p> <p>Cognitive Complexity: Understanding/Conceptual (Bloom's)</p>
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Plain English Strategies:

- Unnecessary detail was removed ("blueberry").
- A simple diagram replaced some of the text.
- A subject-verb-object sentence structure is used.
- Previous question is broken up into two short sentences.
- Question starts with a question word.

*Note: Alignment to the standard and cognitive complexity did not change.

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Sample Item 4

Sample Item - Science, Grade 5

<p>ORIGINAL VERSION</p> <p>Water droplets forming on grass during a cool summer night is an example of which part of the water cycle?</p> <p>A) condensation</p> <p>B) transpiration</p> <p>C) evaporation</p> <p>D) precipitation</p>	<p>Standard 5.P.2.1: Explain how the sun impacts the processes of the water cycle (including evaporation, transpiration, condensation, precipitation and runoff).</p> <p>Cognitive Complexity: Remember/Factual (Bloom's)</p>
--	---

Accessibility Issues:

- The question is lengthy and does not begin with a question word.

<p>IMPROVED VERSION</p> <p>Water droplets often form on grass at night when the temperature cools. Which part of the water cycle is this?</p> <p>A) condensation</p> <p>B) transpiration</p> <p>C) evaporation</p> <p>D) precipitation</p>	<p>Standard 5.P.2.1: Explain how the sun impacts the processes of the water cycle (including evaporation, transpiration, condensation, precipitation and runoff).</p> <p>Cognitive Complexity: Remember/Factual (Bloom's)</p>
--	---

Plain English Strategies:

- Question is broken into two short sentences.
- Question now begins with a question word.

*Note: Alignment to the standard and cognitive complexity did not change.

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Sample Item 5

Sample Item - Reading, Grade 4

<p>ORIGINAL VERSION:</p> <p>Which statement from the text supports the idea that chefs do not have much free time?</p> <p>A) "It's a lot of planning."</p> <p>B) "Every day it's something different."</p> <p>C) "When everybody is playing, you're working."</p> <p>D) "We're going to have a wide variety of things."</p>	<p>Standard RI.4.1: Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>Cognitive Complexity: Skill/Concept (DOK)</p>
---	---

Accessibility Issues:

- The question uses negation ("do not have").
- "Free time" does not have a clear translation.

<p>IMPROVED VERSION:</p> <p>Which statement from the text supports the idea that chefs have unusual hours?</p> <p>A) "It's a lot of planning."</p> <p>B) "Every day it's something different."</p> <p>C) "When everybody is playing, you're working."</p> <p>D) "We're going to have a wide variety of things."</p>	<p>Standard RI.4.1: Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>Cognitive Complexity: Skill/Concept (DOK)</p>
---	---

Plain English Strategies:

- The negation is reworded to use an affirmative phrase.
- "Free time" is reworded to use the more accessible phrase, "unusual hours."

*Note: Alignment to the standard and cognitive complexity did not change.
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Sample Item 6

Sample Item - Reading, Grade 4

<p>ORIGINAL VERSION:</p> <p>According to the information in the text, how does the author show that being an executive chef is hard work?</p> <p>A. by showing the many different duties of an executive chef every day</p> <p>B. by describing the many recipes that an executive chef can make each season</p> <p>C. by explaining the different classes that an executive chef must complete</p> <p>D. by talking about the people who have eaten in his restaurant recently</p>	<p>Standard RI.4.5: Describe the overall structure of events, ideas, concepts, or information in a text or part of a text.</p> <p>Cognitive Complexity: DOK--Strategic Thinking</p>
---	---

Accessibility Issues:

- The question is wordy and contains unnecessary detail ("According to the information in the text".)

<p>IMPROVED VERSION:</p> <p>How does the author show that being an executive chef is hard work?</p> <p>A) by showing the many different duties of an executive chef every day</p> <p>B) by describing the many recipes that an executive chef can make each season</p> <p>C) by explaining the different classes that an executive chef must complete</p> <p>D) by talking about the people who have eaten in his restaurant recently</p>	<p>Standard RI.4.5: Describe the overall structure of events, ideas, concepts, or information in a text or part of a text.</p> <p>Cognitive Complexity: DOK--Strategic Thinking</p>
---	---

Plain English Strategies:

- The unnecessary detail in the stem was removed.

*Note: Alignment to the standard and cognitive complexity did not change.

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Pre Quiz Warning

The quiz that follows this page (Qualification Quiz) is a graded quiz. It is recommended that trainees review any content that was covered in this course before beginning this quiz.

Trainees will now be presented with a set of 10 questions. This quiz is not timed, but it does count. Trainees may use any notes they may have made.

Trainees must pass with a minimum score of 90% and are permitted to take the quiz multiple times.

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Plain English Quiz

Grading method: Highest grade

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Question 1

Not yet answered

Points out of 1.00

Flag question

Which statement provides an accurate description of Plain English in assessment?

Select one:

- ☐ a. Plain English is a viable process for altering the construct targeted for measurement in an assessment item.
- ☐ b. Plain English is an evidence-based approach for ensuring students perform well on an assessment.
- ☐ c. Plain English is a research-supported process for reducing the complexity of language on an assessment.
- ☐ d. Plain English is a team-oriented approach for reducing the cognitive complexity of items on an assessment.

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Question 2

Not yet answered

Points out of 1.00

Flag question

What is the purpose of designing assessments with accessibility in mind?

Select one:

- ☐ a. to help ensure that an assessment and its item set permit a student to demonstrate his or her knowledge of constructs targeted for measurement
- ☐ b. to help ensure students perform well on assessments and answer test items correctly
- ☐ c. to help determine the targeted construct and cognitive complexity an item is intended to measure on an assessment
- ☐ d. to help determine the conditions of the environment in which the assessment will be taken

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Question 3

Not yet answered

Points out of 1.00

Flag question

What is most likely responsible for performance gaps between EL and non-EL students on assessments?

Select one:

- ☐ a. unnecessary cognitive complexity
- ☐ b. altered constructs targeted for measurement
- ☐ c. differentiated instruction
- ☐ d. linguistic and cultural biases

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Question 4

Not yet answered

Points out of 1.00

Flag question

Which linguistic feature has research shown to improve the accessibility of a test item for EL students?

Select one:

- ☐ a. verbs that consist of two words
- ☐ b. the active voice
- ☐ c. the use of pronouns
- ☐ d. negation

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Question 5

Not yet answered

Points out of 1.00

Flag question

Which sentence uses the passive voice?

Select one:

- ☐ a. The lesson was taught by an English teacher.
- ☐ b. The English teacher wanted to be sure students understood the lesson.
- ☐ c. English is not hard if you have a good teacher.
- ☐ d. When in doubt, the English teacher told students to use a dictionary.

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Question 6

Not yet answered

Points out of 1.00

Flag question

Which choice is a Plain English strategy for addressing complex sentence structures?

Select one:

- ☐ a. using multiple adjectives to describe a noun
- ☐ b. using the same word to describe a single concept or thing in an item
- ☐ c. using generic terms and contexts familiar to diverse backgrounds
- ☐ d. using a subject-verb-object pattern for statements

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Question 7

Not yet answered

Points out of 1.00

Flag question

Below are two sentences. There is a linguistic feature in the second sentence that presents an accessibility issue.

"Sally and Jane were sitting at the kitchen table. Sally wanted to talk about her day, but she seemed only interested in eating her lunch."

What is the linguistic feature in the second sentence that presents an accessibility issue?

Select one:

- ☐ a. The second sentence begins with a dependent clause.
- ☐ b. The second sentence contains unclear pronouns.
- ☐ c. The second sentence uses the passive voice.
- ☐ d. The second sentence contains words with multiple meanings.

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Question 8

Not yet answered

Points out of 1.00

Flag question

Below is a question aligned to a third-grade mathematics standard. There are multiple linguistic features in the wording of the question that present accessibility issues.

"If a shape is divided into halves, how many equal parts are there?"

Which Plain English strategy would address the accessibility issues found in the wording of the question?

Select one:

- ☐ a. using the active voice and present tense
- ☐ b. removing unnecessary detail
- ☐ c. breaking long sentences into shorter ones
- ☐ d. using bullets to list an item's details

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Question 9

Not yet answered

Points out of 1.00

Flag question

Below is a question aligned to an eighth-grade science standard. There are multiple linguistic features in the wording of the question that present accessibility issues.

"Which of the following would most likely result in a decrease in the diversity of organisms in a community by disturbing the balance of tolerant and intolerant organisms?"

What are the linguistic features in the wording of the question that present accessibility issues?

Select one:

- ☐ a. the question is wordy and uses the passive voice.
- ☐ b. The question uses negation and long noun phrases.
- ☐ c. The question uses verbs that consist of two words and words with multiple meanings.
- ☐ d. The question uses different words to describe a single concept and contains unclear pronouns.

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Question 10

Not yet answered

Points out of 1.00

Flag question

Below is a question aligned to an eighth-grade reading standard. There are multiple linguistic features in the wording of the question that present accessibility issues.

"Using the information in the text, what is the meaning of the word rerouted as used in paragraph 5?"

Which Plain English strategies would address the accessibility issues found in the wording of the question?

Select one:

- ☐ a. using the active voice and the present tense
- ☐ b. replacing unfamiliar words with simple, high-frequency words and avoiding idioms
- ☐ c. using only necessary adjectives and avoiding words with multiple meanings
- ☐ d. beginning the question with a question word and removing unnecessary detail

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Plain English Quiz

Summary of attempt

Question	Status
1	Answer saved
2	Answer saved
3	Answer saved
4	Answer saved
5	Answer saved
6	Answer saved
7	Answer saved
8	Answer saved
9	Answer saved
10	Answer saved

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[Submit all and finish](#)

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Successful completion of the activities of this course allows students to be eligible to receive a PDF certification of contact hours completed.

Summary of previously received certificates

Issued

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Click the button below to open your certificate in a new browser window.

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Introduction

The purpose of this course is to review the content standards to which test items must be aligned. This course will first present North Carolina's standards for this content area and then introduce their properties through the cognitive framework used to create the standards and the items.


At the end of each segment below, trainees will be asked to complete a short practice set that will prepare them for the Qualifying Quiz. Trainees may attempt each practice set an unlimited number of times.

It should take approximately one (1) hour to complete this online, self-directed course.

Grades 3–8 Mathematics Item Writing

 North Carolina Mathematics Standards	<input checked="" type="checkbox"/>
 North Carolina Standard Course of Study for Mathematics Grades 3–8	<input checked="" type="checkbox"/>
 Alignment of Sample Item to Standard - Sample 1	<input checked="" type="checkbox"/>
 Alignment of Sample Item to Standard - Sample 2	<input checked="" type="checkbox"/>
 Alignment of Sample Item to Standard - Sample 3	<input checked="" type="checkbox"/>
 Alignment of Sample Item to Standard - Sample 4	<input checked="" type="checkbox"/>
 Math Grades 3–8 Alignment Practice Set	<input checked="" type="checkbox"/>
 What Makes a Strong Item	<input checked="" type="checkbox"/>
 Item Improvement - Sample 1	<input checked="" type="checkbox"/>
 Item Improvement - Sample 2	<input checked="" type="checkbox"/>
 Item Improvement - Sample 3	<input checked="" type="checkbox"/>
 Item Improvement - Sample 4	<input checked="" type="checkbox"/>
 Item Improvement Practice Set	<input checked="" type="checkbox"/>
 Achievement Level Descriptors	<input type="checkbox"/>
 ALD Sample Items	
Restricted Not available unless: The activity Achievement Level Descriptors is marked complete	
 Prequiz Warning	
Restricted Not available unless: The activity ALD Sample Items is marked complete	
 Qualification Quiz	<input checked="" type="checkbox"/>

Next Steps

 Next Steps	<input checked="" type="checkbox"/>
 Certificate of Completion	<input type="checkbox"/>

North Carolina Mathematics Standards

North Carolina *Standard Course of Study* for Mathematics Grades 3 - 8

HOW TO READ THE GRADE-LEVEL STANDARDS

The North Carolina *Standard Course of Study* for Mathematics is organized by domain, cluster, and individual standard.

The domain is a larger group of related standards. Within a domain, the standards are grouped into clusters. A cluster is a smaller group of related standards. The standard defines what students should understand and be able to do. Below is an example from grade 3:

[DOMAIN] Operations and Algebraic Thinking (OA)

[CLUSTER] Solve problems involving the four operations, and identify and explain patterns in arithmetic.

- [STANDARD] 3.OA.8 Solve two-step word problems using addition, subtraction, and multiplication, representing problems using equations with a symbol for the unknown number.
- [STANDARD] 3.OA.9 Interpret patterns of multiplication on a hundreds board and/or multiplication table.

DOMAINS

Domains for Math Grades 3–5

- 1 - Operations and Algebraic Thinking (OA)
- 2 - Number and Operations in Base Ten (NBT)
- 3 - Number and Operations - Fractions (NF)
- 4 - Measurement and Data (MD)
- 5 - Geometry (G)

Domains for Math Grades 6–7

- 1 - Ratios and Proportional Relationships (RP)
- 2 - The Number System (NS)
- 3 - Expressions and Equations (EE)
- 4 - Geometry (G)
- 5 - Statistics and Probability (SP)

Domains for Math Grade 8

- 1 - The Number System (NS)
- 2 - Expressions and Equations (EE)
- 3 - Functions (F)
- 4 - Geometry (G)
- 5 - Statistics and Probability (SP)

TD101C1_MAT: NC Math Standards Grades 3-8

ABBREVIATIONS

Each standard is presented using abbreviations.

An example is 3.OA.8:

3: Grade Level 3

OA: Operations and Algebraic Thinking domain

8: The 8th standard within the Operations and Algebraic Thinking domain for grade 3.

Some standards have associated substandards. An example is 6.NS.6.a.

6: Grade Level 6

NS: The Number System domain

6: The 6th standard within the Number System domain for grade 6.

a: The first substandard under 6.NS.6.

REVIEW THE STANDARDS

Please visit the [North Carolina Department of Public Instruction \(NCDPI\) K–12 Math Curriculum and Instruction google site](#) to review the North Carolina *Standard Course of Study* for Mathematics.

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North Carolina Standard Course of Study for Mathematics Grades 3–8

North Carolina *Standard Course of Study* for Mathematics Grades 3–8

STANDARDS FOR MATHEMATICAL PRACTICE

In addition to the content grade-level specific standards, the Standards for Mathematical Practice are expected to be integrated into every mathematics lesson for all students grades K–12. The Standards for Mathematical Practice describe varieties of expertise that mathematical educators at all levels should seek to develop in their students. These practices rest on important "processes and proficiencies" with longstanding importance in mathematics education. The first of these are the NCTM process standards of problem solving, reasoning and proof, communication, representation, and connections. The second are the strands of mathematical proficiency specified in the National Research Council's report *Adding It Up*: adaptive reasoning, strategic competence, conceptual understanding (comprehension of mathematical concepts, operations and relations), procedural fluency (skill in carrying out procedures flexibly, accurately, efficiently, and appropriately), and productive disposition (habitual inclination to see mathematics as sensible, useful, and worthwhile, coupled with a belief in diligence and one's own efficacy).

The following Standards of Mathematical Practice should be incorporated into items when appropriate.

The eight Standards of Mathematical Practice are:

- 1 - Make sense of problems and persevere in solving them.
- 2 - Reason abstractly and quantitatively.
- 3 - Construct viable arguments and critique the reasoning of others.
- 4 - Model with mathematics.
- 5 - Use appropriate tools strategically.
- 6 - Attend to precision.
- 7 - Look for and make use of structure.
- 8 - Look for and express regularity in repeated reasoning.

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Alignment of Sample Item to Standard - Sample 1

Assigned Standard: 3.NBT.2

Add and subtract whole numbers up to and including 1,000.

- Use estimation strategies to assess reasonableness of answers.
- Model and explain how the relationship between addition and subtraction can be applied to solve addition and subtraction problems.
- Use expanded form to decompose numbers and then find sums and differences.

Sample Item

School X used 488 pencils last year. School Y used 375 pencils last year. What is the total number of pencils the two schools used last year?

- A. 753
- B. 763
- C. 853
- D. 863

Explanation: This item aligns to the assigned standard.

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Alignment of Sample Item to Standard - Sample 2

Assigned Standard: 5.NF.7

Solve one-step word problems involving division of unit fractions by non-zero whole numbers and division of whole numbers by unit fractions using area and length models, and equations to represent the problem.

Sample Item - Does Not Align

A group of four friends will equally share $\frac{3}{4}$ of a cake. How much of the cake will each friend get?

- A. $\frac{3}{10}$
- B. $\frac{1}{3}$
- C. $3\frac{1}{5}$
- D. $5\frac{1}{3}$

Explanation: This item **does not align** to the assigned standard. The standard evaluates the division of unit fractions by whole numbers and whole numbers by unit fractions. This item however, involves dividing a nonunit fraction by a whole number.

Sample Item - Does Align

A group of four friends will equally share $\frac{1}{2}$ of a cake. How much of the cake will each friend get?

- A. $\frac{1}{2}$
- B. $\frac{1}{4}$
- C. $\frac{1}{6}$
- D. $\frac{1}{8}$

Explanation: By changing the fraction from $\frac{3}{4}$ to $\frac{1}{2}$, the item now aligns to the assigned standard.

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Alignment of Sample Item to Standard - Sample 3

Assigned Standard: 6.EE.1

Write and evaluate numerical expressions, with and without grouping symbols, involving whole-number exponents.

Sample Item

What is the value of $2^3 + 8^2$?

- A. 22
- B. 24
- C. 72
- D. 105

Explanation: This item aligns to the assigned standard.

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Alignment of Sample Item to Standard - Sample 4

Assigned Standard: 8.G.9

Understand how the formulas for the volumes of cones, cylinders, and spheres are related and use the relationship to solve real-world and mathematical problems.

Sample Item - Does Not Align

A rectangular sandbox is 48 inches long, 36 inches wide, and 12 inches deep. What is the volume of the sandbox?

- A. 96 cubic inches
- B. 192 cubic inches
- C. 10,368 cubic inches
- D. 20,736 cubic inches

Explanation: This item **does not align** to the standard. The standard states to use the formulas for volumes of cones, cylinders, and spheres. This item involves finding the volume of a rectangular prism.

Sample Item - Does Align

A cylindrical tube has a diameter of 5 inches and a height of 25 inches. What is the **approximate** volume of the tube?

- A. 196 cubic inches
- B. 393 cubic inches
- C. 491 cubic inches
- D. 1,963 cubic inches

Explanation: In order to meet the assigned standard a completely new item needed to be developed. Notice that the item now involves determining the volume of a cylinder, which aligns to the assigned standard.

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Math Grades 3–8 Alignment Practice Set

This practice will help trainees identify any aspects of item writing in which they might need reinforcement. It is scored, but it doesn't count, and trainees can take it as many times as they want.

Trainees may use the [standards](#) and any notes they may have taken while completing the activity.

Grading method: Highest grade

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What Makes a Strong Item

When writing items, be aware of the following concerns. Attending to these concerns will make stronger items.

1. Items should not be overly wordy. They should contain only pertinent information.
2. Choose the wording of the items carefully. Avoid wording that gives context clues to what the key will be (e.g. 'the smallest amount').
3. Answer choices should contain common student errors.
4. Answer choices should contain only one correct answer.
5. Answer choices should not give away the key (e.g., be the only large number).
6. Answer choices should not have overlapping ranges. Answer choices should be mutually exclusive (e.g., use 1–2, 3–4, 5–6, 7–8 instead of 1–2, 2–3, 3–4, 4–5.)
7. Avoid teaching in the stem (e.g. providing information that teaches students material about a specific topic.)
8. Make sure that the item is realistic, both in context and mathematically.
9. Keep units consistent within the item.
10. Make sure the item is not ambiguous. Be precise about what is being described.
11. Do not create an item that can be solved correctly by using incorrect reasoning or by applying wrong methods.
12. Avoid clang association.

The next few pages will present weak items based on some of the issues stated above and will show how to make the items stronger.

Last modified: Wednesday, March 15, 2017, 7:34 AM

[Previous: Math Grades 3–8 Alignment Practice Set](#)

[Next: Item Improvement - Sample 1](#)

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Item Improvement - Sample 1

Weak Item

Marilyn and Linda work in a computer factory. Marilyn works Monday through Friday. Linda works Tuesday through Saturday. Marilyn packages 10 computers an hour. Linda packages 4 more computers an hour than Marilyn. How many computers can the two package in 6 hours?

- A. 64
- B. 84
- C. 124
- D. 144

Explanation

The item has a lot of unnecessary wording. By removing the unnecessary wording, we are able to create an item that is easier to read.

Improved Item

Marilyn and Linda work in a computer factory. Marilyn packages 10 computers an hour. Linda packages 4 more computers an hour than Marilyn. How many computers can the two package in 6 hours?

- A. 64
- B. 84
- C. 124
- D. 144

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Item Improvement - Sample 2

Weak Item

What is the value of $\frac{3}{2} \times \frac{2}{5}$?

- A. $\frac{6}{10}$
- B. $\frac{5}{7}$
- C. $\frac{6}{7}$
- D. $\frac{3}{5}$

Explanation

The item has two correct answers. Foil A and Foil D are equivalent forms of the same fraction. Every item should have only one correct answer.

Improved Item

What is the value of $\frac{3}{2} \times \frac{2}{5}$?

- A. $\frac{6}{5}$
- B. $\frac{5}{7}$
- C. $\frac{6}{7}$
- D. $\frac{3}{5}$

Explanation

The item now has only one correct answer.

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Item Improvement - Sample 3

Weak Item

A rectangle has a perimeter of 48 cm. The length of the rectangle is twice the width. What is the length of the rectangle?

- A. 96 cm
- B. 50 cm
- C. 24 cm
- D. 16 cm

Explanation

Foils A and B are poor answer choices. The perimeter of the rectangle is 48 cm, so without doing any work, a student can eliminate choices A and B because they are both larger than the perimeter. Foils A and B should be revised so a student is unable to easily eliminate the foils based on the information given in the stem of the item.

Improved Item

A rectangle has a perimeter of 48 cm. The length of the rectangle is twice the width. What is the length of the rectangle?

- A. 8 cm
- B. 12 cm
- C. 16 cm
- D. 24 cm

Explanation

With all the foils being less than 48, the student can no longer rule out answer choices as being obviously incorrect. Secondly, the revised foils are common mistakes. Foil B is 48 divided by 4. Foil A is the width of the rectangle.

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[Next: Item Improvement - Sample 4](#)

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Item Improvement - Sample 4

Weak Item

Carter recorded the daily high temperature for seven days in the table below.

Day	Temperature (°F)
1	31°
2	34°
3	22°
4	17°
5	16°
6	12°
7	22°

What is the mean temperature for his data?

- A. 16°
- B. 17°
- C. 22°
- D. 31°

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Explanation

For these data, the mean, median, and mode all equal 22. A student does not have to distinguish between the different measures of central tendency. The item does not assess a student's knowledge of mean.

Improved Item

Carter recorded the daily high temperature for seven days in the table below.

Day	Temperature (°F)
1	30°
2	34°
3	22°
4	17°
5	16°
6	12°
7	16°

What is the mean temperature for his data?

- A. 16°
- B. 17°
- C. 21°
- D. 31°

Explanation

By changing the first and last temperature in the table, the mean, median, and mode are now all different. The item better assesses a student's knowledge of mean.

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Item Improvement Practice Set

This practice set will help trainees identify any aspects of item writing in which they might need reinforcement. It is scored, but it doesn't count; and trainees can take it as many times as they want.

Trainees may use the [standards](#) and notes they may have taken while completing the activity.

Grading method: Highest grade

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Grading method: Highest grade

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Not complete

Points out of 1.00

Flag question

Which statement is true about the item shown below?

Frank is having a sleepover and invites 6 friends. In the morning, they eat cereal for breakfast. A serving of the cereal is $\frac{3}{4}$ cup. They eat a total of 12 servings. How many total cups of cereal did they eat?

- A. 12 cups
- B. 9 cups
- C. 4.5 cups
- D. 1.5 cups

Select one:

- ☐ a. The item has unnecessary wording.
- ☐ b. There is nothing wrong with this item.
- ☐ c. The item does not have realistic data.
- ☐ d. The item foils give away the correct answer.

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Not complete

Points out of 1.00

Flag question

An item is shown below.

A rectangle has a width of 3 meters and a length of 6 meters. What is the area of the rectangle?

- A. 9 square meters
- B. 12 square meters
- C. 15 square meters
- D. 18 square meters

Which statement is true about the item?

Select one:

- ☐ a. The item is ambiguous.
- ☐ b. The answer choices give away the key.
- ☐ c. The item can be solved correctly using incorrect reasoning.
- ☐ d. There is nothing wrong with this item.

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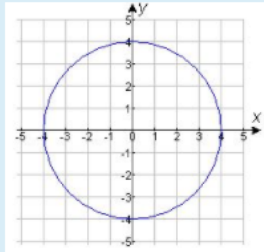
Not complete

Points out of 1.00

Flag question

An item is shown below.

A circle is drawn in the coordinate plane as shown below.



Which statement is true about the point (3, 2)?

- A. The point lies outside the circle.
- B. The point lies inside the circle.
- C. The point is on the circle.
- D. The point is the center of the circle.

Which statement is true about the item?

Select one:

- ☐ a. This item contains wording in the stem that gives away the correct answer.
- ☐ b. This item contains foils that do not include common errors.
- ☐ c. The item contains foils that are overlapping.
- ☐ d. This item contains teaching within the stem.

Check

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Not complete

Points out of 1.00

Flag question

Which statement is true about the item below?

Mrs. Kramer records the time, in seconds, of eight of her students in the 100 meter run. The times are displayed in the table below.

14.8	6.9
12.3	7.1
10.9	10.9
11.4	11.3

What is the median time for the eight students?

- A. 11.40 seconds
- B. 11.20 seconds
- C. 11.10 seconds
- D. 10.90 seconds

Select one:

- ☐ a. The item contains foils that do not contain common student mistakes.
- ☐ b. The item does not have realistic data.
- ☐ c. The item contains answer choices that give away the correct answer.
- ☐ d. The item can be solved by using incorrect mathematical reasoning.

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Achievement Level Descriptors

An Achievement Level Descriptor is used to explain the knowledge, skills, and processes that students display on the EOG or EOC. There are 4 Achievement Level Descriptors:

Achievement Level	Meets On-Grade-Level Proficiency Standard	Meets Career-and-College Readiness Standard
Level 5	Yes	Yes
Level 4	Yes	Yes
Level 3	Yes	No
Not Proficient	No	No

Not Proficient - Students who are Not Proficient demonstrate inconsistent understanding of grade level content standards and will need support.

Level 3 - Students at Level 3 demonstrate sufficient understanding of grade level content standards though some support may be needed to engage with content at the next grade/course.

Level 4 - Students at Level 4 demonstrate a thorough understanding of grade level content standards and are on track for career and college.

Level 5 - Students at Level 5 demonstrate comprehensive understanding of grade level content standards, are on track for career and college, and are prepared for advanced content at the next grade/course.

Item writers and item reviewers will be asked to assign an Achievement Level Descriptor (ALD) to the content and skill level of each item. Ensuring that our items are aligned to our standards as well as our ALDs will help us better understand student performance and ensure the appropriate depth and rigor for all assessments.

The following links contain the achievement level descriptors for Mathematics. Please print the documents and keep them as a reference when writing and reviewing items.

[Mathematics EOGs](#)

[NC Math 1 and NC Math 3 EOCs](#)

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ALD Sample Items

ALD Level 3 Sample Grade 3

Standard: 3.NF.3.

ALD Level 3: Represent equivalent fractions using area models.

Which figure shows a shaded amount that is equivalent to the fraction $\frac{2}{6}$?



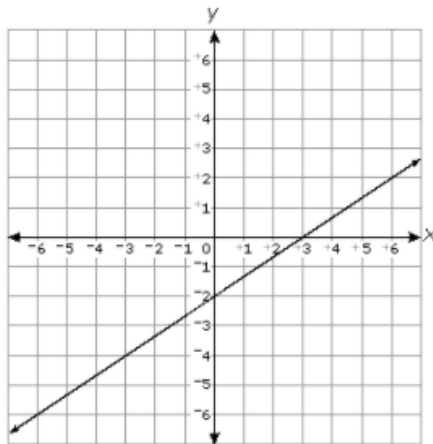
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ALD Level 3 Sample Grade 8

Standard: 8.F.4

ALD Level 3: Write an equation in slope-intercept form given a graph.

What is the equation of the line graphed below?



A $y = \frac{2}{3}x - 2$

B $y = \frac{2}{3}x + 3$

C $y = \frac{3}{2}x - 2$

D $y = \frac{3}{2}x + 3$

ALD Level 4 Sample Grade 5

Standard: 5.NBT.5

ALD Level 4: Multiply a three-digit number by a two-digit number using the standard algorithm in real-world word problems.

A supermarket has 238 large boxes of cereal. Each large box holds 32 small bags of cereal. How many small bags of cereal are in the supermarket?

A 6,506 bags

B 6,616 bags

C 7,506 bags

D 7,616 bags

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ALD Level 4 Sample Grade 7

Standard: 7.EE.1

ALD Level 4: Add, subtract, and expand linear expressions with rational coefficients.

Which expression is equivalent to $\frac{1}{2}(2n + 6)$?

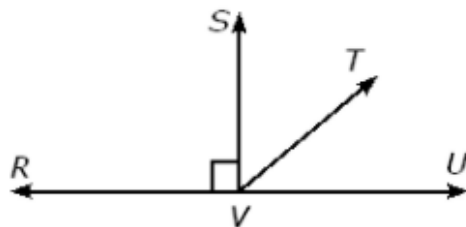
- A $\frac{1}{2} + 2n + 6$
- B $2\frac{1}{2}n + 6\frac{1}{2}$
- C $n + 6$
- D $n + 3$

ALD Level 5 Sample Grade 4

Standard: 4.MD.6

ALD Level 5: Solve multistep problems involving the addition and subtraction of angle measurements."

RVU is a straight line and $\angle TVU$ has a measure of 40° in this figure.



What is the measure of $\angle SVT$?

- A 40°
- B 45°
- C 50°
- D 90°

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ALD Level 5 Sample Grade 6

Standard: 6.RP.3

ALD Level 5: Solve multiple unit conversions of different quantities in the ratio (converting and multiplying measurements).

A motorcycle can go 50 miles using one gallon of gas. **About** how many gallons of gas will be used to go 150 kilometers?

(Note: 1 mile is approximately 1.6 kilometers.)

- A 5 gallons
- B 3 gallons
- C 2 gallons
- D 1 gallon

Last modified: Monday, July 12, 2021, 12:08 PM

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Prequiz Warning

The quiz that follows this page ([Qualification Quiz](#)) is a graded quiz. It is recommended that trainees review any content that was covered in this course or any previous course including the content standards before beginning this quiz.

Trainees will now be presented with a set of 10 questions. This quiz is not timed, but it does count; whereas the practice set did not. Trainees may use any notes they may have made.

To qualify for an initial item writing or reviewing contract, trainees must pass with a minimum score of 80%.

Last modified: Wednesday, July 22, 2020, 11:22 AM

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Qualification Quiz

This quiz will assess trainees' understanding of the standards and item writing practices for Mathematics Grades 3–8. In order to be an item writer or reviewer, trainees must achieve a minimum score of 80% [8/10]. This quiz can be attempted as many times as necessary to achieve a minimum score.

Click **ONLY** the Previous Page and Next Page buttons while in the quiz. **DO NOT** click the Previous or Next links at the bottom of the page until the quiz has been successfully completed.

Grading method: Highest grade

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Not yet answered

Points out of 1.00

Flag question

The item shown below was written to assigned standard 3.OA.7.

Jane bought 8 packages of markers. Each package held 6 markers. How many total markers did Jane buy?

- A. 14
- B. 24
- C. 46
- D. 48

Which statement is true about the item?

Select one:

- ☐ a. The item matches the assigned standard.
- ☐ b. The item aligns to 3.OA.8.
- ☐ c. The item aligns to 4.OA.3.
- ☐ d. The item aligns to 4.OA.5.

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Not yet answered

Points out of 1.00

Flag question

The item shown below was written to assigned standard 4.NF.4.

Jorge poured 38 gallons of water into 6 buckets. He poured the same amount of water into each bucket. How much water did Jorge pour into each bucket?

- A. $6\frac{4}{6}$
- B. $6\frac{1}{2}$
- C. $6\frac{1}{3}$
- D. $6\frac{1}{6}$

Select one:

- ☐ a. The item matches the assigned standard.
- ☐ b. The item aligns to 5.NF.3.
- ☐ c. The item aligns to 5.NF.4.
- ☐ d. The item aligns to 5.NF.7.

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Question 3

Not yet answered

Points out of 1.00

Flag question

The item shown below was written to assigned standard 7.EE.1.

What is the value of x in the equation $3(2x + 10) = 60$?

- A. 5
- B. $8\frac{1}{3}$
- C. $11\frac{2}{3}$
- D. 15

Which statement is true about the item?

Select one:

- ☐ a. The item matches the assigned standard.
- ☐ b. The item aligns to 7.EE.2.
- ☐ c. The item aligns to 7.EE.4.
- ☐ d. The item aligns to 8.EE.7.

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Question 4

Not yet answered

Points out of 1.00

Flag question

The item shown below was written to assigned standard 7.G.4.

A circular pond has a radius of 20 feet. What is the **approximate** distance around the pond?

- A. 63 feet
- B. 126 feet
- C. 1,257 feet
- D. 5,027 feet

Which statement is true about the item?

Select one:

- ☐ a. The item matches the assigned standard.
- ☐ b. The item aligns to 7.G.2.
- ☐ c. The item aligns to 7.G.5.
- ☐ d. The item aligns to 7.G.6.

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Question 5

Not yet answered

Points out of 1.00

Flag question

An item is shown below.

Kylie finished $\frac{1}{2}$ of her class assignment. She finished $\frac{1}{4}$ of her homework assignment. How much of her total assignment has she finished?

- A. $\frac{1}{8}$
- B. $\frac{1}{4}$
- C. $\frac{1}{2}$
- D. $\frac{3}{4}$

Which statement is true about the item?

Select one:

- ☐ a. There is nothing wrong with this item.
- ☐ b. The item creates ambiguity with the way it is written.
- ☐ c. There is teaching taking place within the stem of the item.
- ☐ d. The answer choices do not include any common student mistakes.

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Question 6

Not yet answered

Points out of 1.00

Flag question

An item is shown below.

What is the value of m when $6 + m = 8$?

- A. 2
- B. 4
- C. 12
- D. 14

Which statement is true about the item?

Select one:

- ☐ a. There is nothing wrong with this item.
- ☐ b. The answer choices have more than one correct answer.
- ☐ c. The item creates ambiguity with the way that it is written.
- ☐ d. The answer choices has choices that give away the correct answer.

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Not yet answered

Points out of 1.00

Flag question

An item is shown below.

James is working on a project. He finished $\frac{2}{3}$ of the project in class. He finished $\frac{1}{2}$ of the project at home. How much of the project does he have left to finish?

- A. $\frac{1}{6}$
- B. $\frac{1}{4}$
- C. $\frac{2}{6}$
- D. $\frac{3}{5}$

Which statement is true about the item?

Select one:

- ☐ a. The answer choices give away the correct answer.
- ☐ b. There is an excessive amount of wording in the stem.
- ☐ c. There is nothing wrong with this item.
- ☐ d. The item is not realistic.

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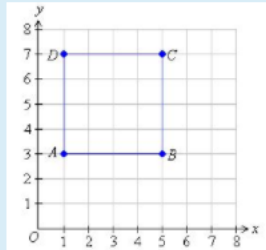
Not yet answered

Points out of 1.00

Flag question

An item is shown below.

A figure is shown below.



Which describes the figure?

- A. parallelogram
- B. rectangle
- C. square
- D. trapezoid

Which statement is true about the item?

Select one:

- ☐ a. There is one answer choice that is very different then the other answer choices.
- ☐ b. There is nothing wrong with this item.
- ☐ c. There is teaching taking place within the stem of the item.
- ☐ d. The item contains overlapping answer choices.

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Not yet answered

Points out of 1.00

Flag question

An item is shown below.

The Pythagorean Theorem, $a^2 + b^2 = c^2$, can be used to determine the third side of a right triangle given the first two sides. The legs of a right triangle are 9 inches and 40 inches. What is the length of the hypotenuse?

- A. 1,681 inches
- B. 360 inches
- C. 49 inches
- D. 41 inches

Which statement is true about the item?

Select one:

- ☐ a. The student can correctly solve the item using the wrong reasoning.
- ☐ b. There is nothing wrong with this item.
- ☐ c. The answer choices do not include common student mistakes.
- ☐ d. There is unnecessary teaching taking place within the stem of the item.

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Not yet answered

Points out of 1.00

Flag question

An item is shown below.

What is the greatest common factor of 8 and 50?

- A. 400
- B. 200
- C. 58
- D. 2

Which statement about the item is correct?

Select one:

- ☐ a. There is teaching taking place within the stem of the item.
- ☐ b. The item has answer choices that do not contain common student mistakes.
- ☐ c. There is nothing wrong with this item.
- ☐ d. The item has answer choices that cue the correct answer.

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TD101C1_MAT: NC Math Standards Grades 3-8

TD101C1_MAT: NC Math Standards Grades 3-8

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Next Steps

Congratulations!

Upon completion of this course, trainees are invited to continue learning on the other B level course or other C level courses. Additionally, and most importantly, trainees can apply to be an item writer or reviewer by completing an online interest form.

If trainees would like to obtain a PDF certificate indicating completion of this course for their records, please click the Next link below or navigate back to the course outline and click the [Certificate of Completion](#) resource.

[[Click this link to go to the online application for item writing and reviewing](#)]

[[Click here to navigate back to the list of courses in the Test Development training series](#)]

Last modified: Wednesday, July 22, 2020, 12:58 PM

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Part X Appendix

Exhibit X-01 Assurances

2021–21 IADA ASSURANCES					
SBE REGION	LEA CODE	LEA/CHARTER NAME	SCHOOL CODE	SCHOOL NAME	2021–22 ASSURANCE RECEIVED
Northwest	140	Caldwell County Schools			Yes
Western	209	Cherokee Central Schools (Federal)			Yes
Southeast	400	Greene County Schools			Yes
Western	440	Haywood County Schools			Yes
Northwest	181	Hickory City Schools			Yes
North Central	510	Johnston County Schools			Yes
Sandhills	620	Montgomery County Schools			Yes
Southeast	650	New Hanover Schools			Yes
Sandhills	770	Richmond County Schools			Yes
Sandhills	830	Scotland County Schools			Yes
Sandhills	26B	Alpha Academy Charter	26B	Alpha Academy Charter	Yes
Southeast	65Z	D.C. Virgo Preparatory School	65Z	D.C. Virgo Preparatory School	Yes
North Central	39A	Falls Lake Academy	39A	Falls Lake Academy	Yes
Southwest	60Q	Invest Collegiate	60Q	Invest Collegiate Transform	Yes
Sandhills	63A	The Academy of Moore County	63A	The Academy of Moore County	Yes
Sandhills	60B	Sugar Creek Charter School	60B	Sugar Creek Charter School	Yes