

Professional Development Planning for the K-3 Formative Assessment: A Short Introduction to the PD Planning Tools

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North Carolina's K-3 Formative Assessment Process was developed with funding from the US Departments of Education and Health and Human Services. The K-3 Formative Assessment is being enhanced with funding from the US Department of Education. The contents of these assessment materials do not represent the policy of these Departments and you should not assume endorsement by the Federal Government.

Overview

Three tools are offered to help you plan for professional development activities around the K-3 Formative Assessment throughout a school year. Each template is designed to help you answer one of the following questions:

1. What professional development opportunities will we offer for each stakeholder group (i.e., teachers, administrators) over the school year?
2. For each topic addressed in the long-term plan, what core components¹ and learning targets will be addressed for each stakeholder group?
3. How can I plan for and evaluate whether a professional development opportunity addressed the expected core components and learning targets?

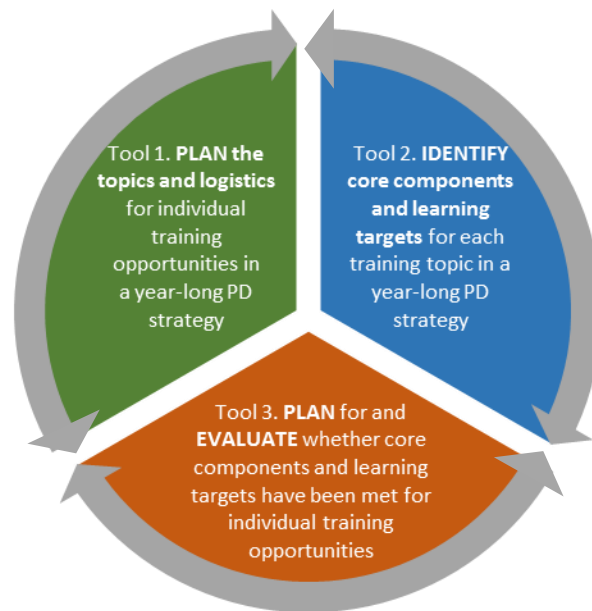
The three tools are designed to inform one another, and are best utilized together (see Figure 1 below). First, consider the K-3 Formative Assessment professional development **topics** you would like to cover over a school year. Tool 1 helps you to organize this information by individual training opportunity and helps plan logistics for annual trainings. Tool 2 allows you to go into more detail about the **core components and learning targets** associated with each training topic. For instance, Tool 2 can help you plan how often the topic will be addressed, in what format(s) the topic should be presented, to whom the topic is directed, who can best present the topic, and which core components are addressed across the annual professional development opportunities.

The information from Tool 2 can be related back to Tool 1, which looks at the year-long K-3 Formative Assessment professional development timeline for each stakeholder by training opportunity. Tool 1 helps to plan the annual logistics of a year-long training plan – what dates, funding, space, and/or trainers are available to fulfill the trainings identified in Tool 2.

Tool 3 can be used throughout the professional development planning process. First, use it alongside Tool 2 to further develop trainings and detail when and how the core components will be addressed in your trainings. Then, after each professional development opportunity, use Tool 3 to evaluate whether the core components and other learning outcomes were successfully addressed.

¹ The core components come from *Puckett Institute (2017). Professional Development Briefs. Morgantown, NC*. They are outlined in more detail later in this Overview.

Figure 1. Using the Professional Development Planning Tools Together



The Six Core Components²

Literature has shown that when professional development activities incorporate as many of the following Core Components as possible, they are more effective at encouraging educators to adopt or change educational practices. The planning tools are based on these six evidence-based, core professional development planning principles.

- **Component 1: Introducing and Illustrating a Practice to Educators**
Describe the formative assessment process and demonstrate how to use it, focusing on its key characteristics, settings where formative assessments are best used, and expected outcomes.
- **Component 2: Active and Authentic Educator Learning Experiences**
Provide opportunities to practice using the K-3 Formative Assessment in authentic, real-life settings.
- **Component 3: Educator Understanding of a Practice**
Provide feedback to educators on what worked well, what can be improved, and what student benefits were observed.
- **Component 4: Opportunities to Become Proficient in a Practice**
Engage educators in self-reflection and self-assessment to promote deep understanding of the K-3 Formative Assessment.
- **Component 5: Professional Development Specialist (PDS) Supports**
Provide support to educators through in-service training and follow-up sessions to reinforce their understanding and use of the K-3 Formative Assessment.
- **Component 6: Professional Development of Sufficient Duration and Interest**
Provide professional development through multiple learning opportunities spread out over time.

² The core components come from *Puckett Institute (2017). Professional Development Briefs. Morgantown, NC.*

Considering Other Professional Development Opportunities

K-3 Formative Assessment training is not the only training teachers and administrators will participate in over a school year. When developing a year-long K-3 Formative Assessment plan, it is important to consider how this professional development plan will fit within a more comprehensive PD plan for stakeholders. Here are some questions you may want to consider:

- Who needs to approve our professional development plan?
 - *Note:* With its inclusion of learning targets and comprehensive training plans for each topic, Tool 2 offers a great format for presenting your professional development plan to decision makers.
- To what other professional development opportunities are our participants already committed?
- Can K-3 Formative Assessment trainings be offered in conjunction with other professional development commitments?
 - For example, knowing that a district provides a day-long, in-service every August may be a great opportunity to share training spaces and costs.
- In what ways, if any, can K-3 Formative Assessment trainings be designed to satisfy teachers' credentialing requirements? Can teachers receive credit for an opportunity?
 - *Note:* Tool 1 includes a column for PD Hours, which will facilitate an evaluation of whether the training opportunity meets requirements for teachers' ongoing professional development credits.
- Are there other formats to present a training topic?
 - For example, can some instructional topics be moved online to allow for more discussion-based topics to be considered in in-person training opportunities?

Professional Development Planning Tool 1: What professional development opportunities will we offer for each stakeholder group over the school year?

Use PD Planning Tool 1 to plan for the K-3 Formative Assessment professional development opportunities that will occur for each stakeholder group throughout a school year. Complete a template for each stakeholder group; be sure to consider the topics covered in each PD opportunity; the best timing and location for the opportunity; who is best able to lead the training; and how much it will cost. Note PD hours to assist with assessing teachers' ongoing professional development credits. This tool can be adapted to plan across multiple school years or for a few months within the year.

Target Audience: K-3 Teachers						
Time Period:						
Opportunity (format)	Topic(s)	PD Hours	Date & Time	Location	Lead	Estimated or Budgeted cost
Formative assessment Kick-off (in-person)	<ul style="list-style-type: none"> Introduction to K-3 Formative Assessment How to use the K-3 Formative Assessment How to use the technology platform 	12	July 30-31, 2018 9am-3pm	Wilson Elementary School	Joe Smith jsmith@trainer.org 555-555-5555	<ul style="list-style-type: none"> \$300 x 35 teachers = \$10,500 \$500 Rental fee \$200 Food \$300 Trainer Total: \$11,500
Notes: <ul style="list-style-type: none"> Example: Reach out to Joe Smith ahead of time to confirm mid-year refresher training dates. 						

Target Audience: K-3 Administrators Time Period:						
Opportunity (format)	Topic(s)	PD Hours	Date & Time	Location	Lead	Estimated or Budgeted cost
<i>What is formative assessment (Webinar)</i>	<ul style="list-style-type: none"> <i>Introduction to formative assessments</i> <i>Overview of pilot program</i> 	2	<i>May 31, 2018 1-3pm</i>	<i>WebEx</i>	<i>Pam Johnson Sate Lead 555-555-5555</i>	<ul style="list-style-type: none"> <i>\$5,000 for labor hours</i>
Notes: <ul style="list-style-type: none"> <i>Example: Update pilot kick-off dates by May 15 to help Pam build training materials</i> 						

Professional Development Planning Tool 2: For each topic addressed in the long-term plan, what core components and learning targets will be addressed for each stakeholder group?

Use PD Planning Tool 2 to plan a comprehensive training agenda for each individual K-3 Formative Assessment training topic addressed in the year-long PD plan. For each topic, identify the specific PD opportunities that will support the learning; who will present at each opportunity; the intended learning target for each opportunity; and the core components addressed by the opportunity. In the example below, we consider the training topic “Introduction of the K-3 Formative Assessment” identified in Professional Development Planning Tool 1.

Topic:			
Target Audience: K-3 Teachers			
Opportunity (Format)	Lead/Presentation	Learning Target	Details & Core Components
July 30 Kick-off (In-Person)	John Smith, Regional Consultant “Overview of Select K-3 Formative Assessment Content”	Teachers will be able to: <input type="checkbox"/> Identify two techniques for incorporating the assessment into classroom routines <input type="checkbox"/> Incorporate feedback into their administration of the assessment	Component 1: Overview of the assessment materials. Veteran Teacher will provide examples of how she has incorporated the assessment into her classroom routine. Component 2: Regional Consultant guides educators through 3 videos across different progressions to practice observing students and using the assessment materials. Component 3&4: After each video and in small groups, ask educators to provide their process when using the materials; Regional Consultant and Veteran Teacher provide feedback on the process to educators.

Topic: Target Audience: K-3 Administrators			
Opportunity (Format)	Trainer/Presenter	Learning Target	Details & Core Components
May 31 Training (Webinar)	Pam Johnson "What is formative assessment?"	Administrators will be able to: <input type="checkbox"/> Define formative assessments <input type="checkbox"/> Identify teachers for pilot program in coming school year	Component 1: Introduction to the K-3 Formative Assessment, including a description of the domains (focus on the whole child), the constructs included in each domain, and an explanation of the structure of the progressions, along with the performance descriptors and examples.

Professional Development Planning Tool 3: How can I plan for and evaluate whether the PD activity's objectives were met?³

Use PD Planning Tool 3 to help plan professional development opportunities and evaluate whether objectives were met. Consider which Core Components you expect to be addressed in each training opportunity, and mark them in the left-most column. Though you should plan to address every component through a year-long professional development plan, each training opportunity may address a different combination of components. You can also add your learning targets from Tool 2 to the final table. During your activity, ask an outside evaluator to use the rubric to score whether you did or did not meet the expected components and learning targets by marking the right-most column. You may also use a participant evaluation form to score the training (see example at end). Then, use the same rubric as a self-evaluation, marking the right-most column based on your own evaluation of the professional development opportunity. Compare your impressions to that of your outside evaluator and/or participants, making notes for how to improve future activities.

When planning future activities, consider comparing evaluations of the previous activity to recent outcome data (e.g., platform, coaching, and teacher-self assessment data) to see in which areas participants have succeeded or struggled. This can be helpful, not only to identify future training areas, but also to evaluate the effectiveness of your previous training methods.

³ Checklist adapted from Puckett Institute (2017). *Professional Development Brief, No. 4: Professional Development Planning Process Tool and Checklist*. Morgantown, NC.

Training: Date & Time:			
Expected? <i>Fill out prior to PD event.</i>	Core Component 1: Introducing and Illustrating a Practice to Educators Does the professional development describe how to use the K-3 Formative Assessment in detail and provide multiple examples of the practice by...?	Met/Unmet <i>Fill out after PD event.</i>	Notes
<input type="checkbox"/>	Describing the characteristics and uses of K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Describing the expected outcomes of using the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Describing the settings where the K-3 Formative Assessment can be used?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Describing and illustrating how the K-3 Formative Assessment is aligned with state, district, or school standards?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Using photographs, videos, or other multimedia tools to illustrate how to use the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Providing at least three different examples of how the K-3 Formative Assessment can be used with students?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	

Expected? <i>Fill out prior to PD event.</i>	Core Component 2: Active and Authentic Educator Learning Experiences Does the professional development use learner experiences to illustrate the use of the practice by...?	Met/Unmet <i>Fill out after PD event.</i>	Notes
<input type="checkbox"/>	Using simulations or other exercises to have educators use the K-3 Formative Assessment, ideally in the setting that they will use the assessment process (e.g., classroom or school)?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Engaging the educators in multiple opportunities to use the K-3 Formative Assessment during the training?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Observing or having the educators record the real-time use of the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	

Expected? <i>Fill out prior to PD event.</i>	Core Component 3: Educator Understanding of a Practice Does the professional development promote educator participation in training by...?	Met/Unmet <i>Fill out after PD event.</i>	Notes
<input type="checkbox"/>	Offering multiple opportunities for the trainer to provide real-time feedback to educators?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Allowing educators to ask questions about how to use the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Using collective educator participation to learn the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Using videos to prompt educators to describe the characteristics of the practices that were used?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Engaging educators in descriptions of changes or improvements in student learning as a result of using the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	

Expected? <i>Fill out prior to PD event.</i>	Core Component 4: Opportunities to Become Proficient in a Practice Does the professional development engage educators in evaluation of their experiences using the K-3 Formative Assessment by...?	Met/Unmet <i>Fill out after PD event.</i>	Notes
<input type="checkbox"/>	Offering multiple opportunities for educators to reflect on using the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Engaging educators in group discussions about their experiences using the practice (e.g., what worked, what did not work)?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Engaging educators in the development of plans for using the K-3 Formative Assessment in the classroom?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Allowing educators to develop improvement strategies for using the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Using a performance checklist to have educators self-assess how to use the K-3 Formative Assessment with fidelity?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Using journaling, work samples, reflective inquiry, discussions or other collaborative methods to facilitate deep understanding of how to use the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Engaging educators in collaborative planning or communities of practice to provide ongoing peer support for initial learning?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	

Expected? <i>Fill out prior to PD event.</i>	Core Component 5: Professional Development Specialist (PDS) Supports Does the professional development allow for trainers to provide close support to educators by...?	Met/Unmet <i>Fill out after PD event.</i>	Notes
<input type="checkbox"/>	Providing opportunities or plans for the educators to receive ongoing feedback on their use of the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Planning and implementing ongoing supports (peer, coach, supervisor, or mentor, etc.) to reinforce initial learning?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Offering multiple avenues or methods for educators to reach trainers when they have questions?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Using classroom observations of educator practices to provide context-specific suggestions, supportive feedback, and encouragement?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	

Expected? <i>Fill out prior to PD event.</i>	Core Component 6: Professional Development of Sufficient Duration and Interest Does the professional development or future planned professional development events ensure that the duration, intensity, and number of sessions needed to learn to use a practice are sufficient to use the K-3 Formative Assessment with fidelity by...?	Met/Unmet <i>Fill out after PD event.</i>	Notes
<input type="checkbox"/>	Incorporating ongoing learning opportunities into the training over repeated occasions?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Distributing educator opportunities over time so educators can learn to use the K-3 Formative Assessment during multiple sessions?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Jointly identifying with educators ongoing opportunities to improve their use of the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>	Allowing sufficient time and practice for educators to feel confident to use the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	

Expected? <i>Fill out prior to PD event.</i>	Learning Targets Does the professional development or future planned professional development events met the identified learning targets?	Met/Unmet <i>Fill out after PD event.</i>	Notes
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
<input type="checkbox"/>		<input type="checkbox"/> Met <input type="checkbox"/> Unmet	
Notes and Next Steps			

Sample Participant Evaluation Form

To complete PD Planning Tool 3, it may be helpful to use a participant evaluation form to evaluate the extent to which a training met the expected outcomes and components. Keep in mind, each training may address a different combination of components. The example below incorporates components 1, 2, and 4.

Training _____ Date _____ Role _____

A. Please indicate how satisfied you were with your experience in this training:

1 2 3 4 5
Highly Unsatisfied Unsatisfied Indifferent Satisfied Highly Satisfied

B. Please rate if the training met the following goals:

Component 1: Introduced and Illustrated the K-3 Formative Assessment	Met or Unmet
Described the characteristics and uses of the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Described the expected outcomes of using the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Described the settings where the K-3 Formative Assessment can be used?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Described and illustrated how the K-3 Formative Assessment is aligned with state, district, or school standards?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Provided at least three different examples of how the K-3 Formative Assessment can be used with students?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Core Component 2: Active and Authentic Educator Learning Experiences	Met or Unmet
Used simulations or other exercises to use the K-3 Formative Assessment, ideally in the setting that you will use the assessment process (e.g., classroom or school)?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Engaged educators in multiple opportunities to use the K-3 Formative Assessment during the training?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Observed or had the educators record the real-time use of the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Core Component 3: Educator Understanding of a Practice	Met or Unmet
Offered multiple opportunities for the trainer to provide real-time feedback to educators?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Allowed educators to ask questions about how to use the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Used collective educator participation to learn the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Used videos to prompt educators to describe the characteristics of the practices that were used?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Engaged educators in descriptions of changes or improvements in student learning as a result of using the practice?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Core Component 4: Opportunities to Become Proficient in a Practice	Met or Unmet
Offered multiple opportunities for educators to reflect on using the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Engaged educators in group discussions about their experiences using the practice (e.g., what worked, what did not work)?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Engaged educators in the development of plans for using the K-3 Formative Assessment in the classroom?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Allowed educators to develop improvement strategies for using the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet

Used a performance checklist to have educators self-assess how to use the K-3 Formative Assessment with fidelity?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Used journaling, work samples, reflective inquiry, discussions or other collaborative methods to facilitate deep understanding of how to use the K-3 Formative Assessment?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Engaged educators in collaborative planning or communities of practice to provide ongoing peer support for initial learning?	<input type="checkbox"/> Met <input type="checkbox"/> Unmet

Notes, if applicable:

C. After participating in this training, do you feel you could:

Learning Target	Met or Unmet
Identify two techniques for incorporating the assessment into classroom routines	<input type="checkbox"/> Met <input type="checkbox"/> Unmet
Incorporate feedback into your own observations and use of assessment materials	<input type="checkbox"/> Met <input type="checkbox"/> Unmet

Notes, if applicable:

D. What aspects of the training did you find most and least helpful?

E. Any additional feedback you would like to give the trainers?