

# Inventory Planning Facilitator's Notes

## Intended Audiences

District leaders who are beginning the planning process for an assessment inventory

## Prerequisite Knowledge

- Basic understanding of the *Student Assessment Inventory for School Districts*
- Knowledge of the summative and interim/benchmark assessments given in the district

## Time

4 hours

## Materials Needed

- Agenda for each participant
- Session PowerPoint slides
- A copy of the *Student Assessment Inventory for School Districts* for each participant
- Stakeholder mapping exercise for each participant
- Assessment inventory communications and messaging materials for each participant

## Session Goals

- Clarify district context and inventory goals and strategies to complete the assessment inventory process.
- Develop an inventory communications and messaging strategy.
- Identify shared and district-specific needs for support in assessment inventory planning and use.

## Session Overview

Participants will review the goals of the assessment inventory process, walk through the “**Reflect and Plan**” questions in the assessment inventory as a group, and identify multiple stakeholders to involve in the inventory process to build support and momentum. Participants will conclude the session by developing a timeline of assessment inventory activities.

Conduct the session at tables that allow for unobstructed conversation in small groups and have enough space for materials.

## Note

The facilitator's notes, slides, and related activities are openly licensed, and districts are encouraged to modify and/or adapt these materials as needed based on local priorities and context.



## PART ONE—SESSION GOALS AND ASSESSMENT INVENTORY REVIEW

### Time: 15 minutes

**Welcome and introductions**—ask participants to introduce themselves, their districts, and what they hope to learn from this training. (10 minutes)

**Slide 2**—Review the session goals.

**Slide 3**—Briefly review the goals of an assessment inventory process.

**Slide 4**—Briefly review the recommended practices and additional information around the assessment inventory. (Five minutes for slides 2–4)

## PART TWO—DISTRICT AND COMMUNITY CONTEXT

### Time: 45 minutes

**Materials needed:** *Student Assessment Inventory for School Districts* “Reflect and Plan” questions (found on page 4)

### OBJECTIVES

Using the “Reflect and Plan” section of the *Student Assessment Inventory for School Districts* as a guide, districts will discuss the local contexts for their assessment inventory processes.

### OUTLINE OF FACILITATION FOR EXERCISE

Districts will have time to provide highlights of their local contexts. Districts will work through questions in the “Reflect and Plan” section of the *Student Assessment Inventory for School Districts*, which can be found on page 4 (note that there are question ordering differences between this facilitation

guide and the “Reflect and Plan” section in the inventory).

**Slide 5—Script:** “In this next section, we will begin to think about your local district and community context.”

**Slide 6—Script:** “District and community context is the very first question in the inventory’s ‘Reflect and Plan’ section because it is critical to have a solid understanding of local context prior to engaging in an assessment inventory process. This question asks about potential contextual factors that may influence the inventory process and lists some of these factors. Spend the next 10 minutes talking in district teams about your local context and how it may impact the assessment inventory process. Then we will come back together as a group for a broader discussion.” District responses can be written on chart paper or a white board. Following the final district to report out, the facilitator should note similarities and differences across districts and stress that each local district context is different.

*What is the district context in which the inventory is being considered?* (40 minutes)



## PART THREE—DISTRICT STRATEGIES TO COMPLETE THE ASSESSMENT INVENTORY PROCESS

**Time: 90 minutes**

**Materials needed:** *Student Assessment Inventory for School Districts* “Reflect and Plan” questions (found on page 4)

### OBJECTIVES

Using the “Reflect and Plan” section of the *Student Assessment Inventory for School Districts* as a guide, districts will determine or clarify the strategies and timelines for their inventory processes.

### OUTLINE OF FACILITATION FOR EXERCISE

Each district will have an opportunity to respond to questions 4–12 from the “Reflect and Plan” section of the inventory, found on page 4 (note again that there are numbering differences between this facilitation guide and the “Reflect and Plan” section in the inventory).

**Slide 7—Script:** *“In this activity, we will continue with assessment inventory planning by focusing specifically on your districts’ strategies to complete the assessment inventory process. This portion of the agenda will be conducted in a round-robin format with districts responding to one or two questions at a time. Part of the purpose of this planning activity will be for districts to learn from each other and refine their answers. Each participant will record a final response to each question to help with district planning for the assessment inventory process. Full participation in this activity is encouraged as it enriches the conversation and will help all districts refine their assessment inventory planning.”*

The time to allot for discussion and reporting out for each question will vary based on where the participants/districts are in their thinking and/or what thinking they may have done prior to the session. Below are approximate times. Adjust the times based on the needs of the group.

**Slide 8**—Objectives of the inventory process (15 minutes)

*What are the objectives of the student assessment inventory?*

*What individual or entity has the authority to act on the results of the inventory? Who will be making the recommendations?*

**Slide 9**—District strategies to complete the assessment inventory process (10 minutes)

*Who is responsible for the success of this process?*

**Slide 10**—Data collection scope and strategies (20 minutes)

*What is the scope of the inventory? Which assessment(s) should be included or excluded from the inventory table? Based on this scope, what information is needed?*

*What groups should be convened or surveyed to help provide answers (e.g., groups of teachers and other assessment users)? How will they be convened (e.g., in focus groups by grade level or subject) and/or surveyed?*

**Slide 11**—Conducting the review (20 minutes)

*Who will collect the information for the inventory?*

*How will the district communicate to necessary parties that these individuals will be collecting this information?*



**Slide 12**—Collaboration (10 minutes)

*Are there other districts with which it would be useful to collaborate during this process?*

*Are other nearby districts going through an inventory process? If so, are they currently using similar assessments?*

*Are there ways collaborating districts can maximize their resources to complete the inventory process?*

**Slide 13**—Success (10 minutes)

*What does success look like? How will the district know if it achieves it?*

## PART FOUR—COMMUNICATIONS AND ENGAGEMENT

**Time: 45 minutes**

**Materials needed: stakeholder mapping exercise, assessment inventory communications and messaging materials**

### OBJECTIVES

- Consider local context as your district prepares for an assessment inventory.
- Identify those stakeholders who are most critical in your district to the assessment inventory process.
- Determine the current level of support and criticality of support for each stakeholder.
- Build a strong district team for the assessment inventory.

### OUTLINE OF FACILITATION FOR EXERCISE

**Slide 14—Script:** *“In this next section, we will think through the key stakeholders you will need to engage throughout the process and how considering these stakeholders might influence the makeup of an assessment inventory leadership team.”*

**Slide 15—Script:** *“First, we will consider the key stakeholders in your communities who are critical to the success of the assessment inventory process. Please look at the stakeholder*

*mapping exercise included in your materials. Brainstorm the stakeholders who will be involved in the inventory process. Be sure to consider those at the district, school, and classroom levels, as well as external stakeholders.”*

**Slide 16—Script:** *“Using the 2 x 2 matrix template, place the key stakeholders on the template according to their current levels of support and the importance of their engagement. Reflect on which stakeholder groups fall into which categories (champions, allies, opponents), according to the matrix. Before you begin, here are a few suggestions:*

- *Strive to use the full spectrum provided by the matrix to indicate which stakeholders are higher or lower than others.*
- *Try to avoid placing stakeholders ‘on the line’ and instead make a judgment as to whether those stakeholders are slightly more on the high or low side.*
- *Focus on developing strategies for increasing the group of champions (moving allies to champions) and having a strategy for engaging opponents. Note that some opponents may be persuadable while others may not be.” (Three minutes for slides 12–14)*

Participants should spend three minutes brainstorming stakeholders involved in the inventory process and another three minutes placing the key stakeholders on the 2 x 2 matrix template. (Six minutes)



After six minutes (with a reminder after three minutes to move to the second part of the exercise), ask for volunteers to share what stakeholders they have placed in each quadrant (e.g., high importance of support and high level of support, high importance of support and low level of support, low importance of support and high level of support, and low importance of support and low level of support). (Three minutes)

**Slide 17—Script:** “Now, based on this initial local context analysis and stakeholder analysis, has this changed your thoughts about who should be involved in the assessment inventory process? If so, how? Here is a list of stakeholders who could be part of an assessment inventory leadership team and/or consulted at various points in the process. Are there any roles that you might include on an assessment inventory leadership team? Stakeholders who should be consulted, surveyed, or take part in focus groups?” (Three minutes)

Conclude this exercise by stressing the importance of understanding the range of stakeholders in the community and how they can be most effectively involved in the assessment inventory process.

## OUTLINE OF FACILITATION FOR COMMUNICATIONS AND MESSAGING EXERCISE

**Slide 18—Script:** “Building on the stakeholder mapping exercise, we will work in pairs to begin to develop a more comprehensive communications and messaging strategy. Participants should spend 20 minutes in pairs considering the questions in the assessment inventory communications and messaging document, building on the key stakeholders identified in the previous exercise to consider key messages, communication channels and activities, and a timeline for communications and outreach. Pairs will report out to the group on key messages and potential communication channels and activities. These questions are also included on the next few slides (slides 16–21).” (20 minutes in pairs considering questions)

**Slides 19–23—**These slides include additional communications and messaging questions.

After 20 minutes, ask for volunteers to share highlights of their proposed communications and messaging plan, as well as what other district staff will need to be involved to develop successful communications and messaging. Conclude the exercise by reemphasizing the importance of integrating communications throughout the assessment inventory process. (10 minutes)

## PART FIVE—TIMELINE AND NEXT STEPS

**Time: 45 minutes**

### OUTLINE OF FACILITATION FOR EXERCISE

Participants will come back together as a large group to discuss three next steps they will take in the assessment inventory process.

**Slide 24—Script:** “As your districts continue to plan assessment inventory processes, it is important to develop timelines based on your local needs and contexts. Today’s training was aimed at helping your districts begin to address planning and communications questions critical to a successful assessment inventory process.”



**Slide 25—Script:** “The final part of today’s training is for each participant to use this information to create a draft timeline for his/her district, working backward from a new or revised assessment system being in place.

**Slide 26—**The questions on this slide are intended to help you start thinking about a timeline that fits with your district’s needs and context. Take the next 20 minutes to address these questions, and then we will come back as a group to share timelines and next steps.” (20 minutes)

[After 20 minutes] **Script:** “While we do not have time to address all of your milestones now, what will be your immediate next steps in the assessment inventory process?” (Ask for a response from each participant, three to five minutes each.)

**Script:** “Did this training meet the learning goals you described at the beginning? What remaining questions do you have?” (Three minutes)

**Slide 27—Script:** “Thank you for participating in this *Student Assessment Inventory for School Districts* training.”