



# Balanced Assessment Playbook™

Riverside Insights

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Build an equitable and sustainable assessment program to meet every learner's needs.

# Introduction

Robust assessment programs are essential to ensuring educators have the right data to maximize student growth. Yet, especially in the last decade, the deliberate focus on assessments has unintentionally created negative testing cultures, where schools spend excess time and money preparing students for summative, state tests. Too often, teachers get burned out in an “over-testing” environment, and students can be left behind if schools use the wrong insights to understand student learning needs.

At Riverside Insights, we believe that the right testing environment and assessment program can positively impact students, teachers, schools, districts, families, and communities. A healthy assessment plan creates an inclusive testing process that directly impacts instruction and growth and reflects the diversity of all student learning styles. A balanced testing program helps:

- **Students** feel empowered to demonstrate their strengths
- **Teachers** work less and feel confident in differentiated, data-driven instruction
- **Schools** save money and make the right strategic decisions
- **Districts** show growth for all students
- **Families** understand their child’s strengths and know how best to support their child at home

This playbook will help you build a balanced assessment program that creates a positive testing environment and ensures you have the best insights to equitably serve all students. Each of the playbook’s four interactive sections is actionable and will support you with building a comprehensive assessment program that maximizes your resources and meets every student’s unique learning needs.

**We are excited to partner with you on this journey through Riverside Insights’ Balanced Assessment Playbook.**

## About Riverside Insights

At Riverside Insights, we share your commitment to helping individuals elevate their learning potential – from early childhood through their academic journeys, and for the rest of their lives. Our decades of industry-leading research coupled with our comprehensive suite of assessments gives us the tools to help you build the best assessment program for each student in your classroom, school, or district. Visit us at [www.riversideinsights.com](http://www.riversideinsights.com) for more information.



**Your Expertise + Our Insights**  
**Let’s Unlock Limitless Learning. Together.**

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Section 1

## ASSESSING YOUR ASSESSMENTS

Workbook	Description
<p><b>District Assessment Survey</b></p>	<p>Use this workbook to comprehensively view the “big picture” of your assessment programs across classrooms, grade levels, and campuses. This workbook supports you with identifying the purpose of each assessment and incorporating the right training for your teachers and staff.</p>
<p><b>Building Equitable Identification Processes for ELs, Gifted &amp; Talented, and Special Education</b></p>	<p>If your team oversees identification processes for English Learners, Gifted &amp; Talented, or Special Education, this workbook will help ensure you have processes in place to equitably identify students for additional support.</p>

Section 2

## TESTING CULTURE AND ENVIRONMENT

Workbook	Description
<p><b>Preparing Students and Staff for Assessment Time</b></p>	<p>From operational protocols to classroom routines, countless decisions impact the culture and environment on test day. This workbook will help you and your teams determine the right practices and processes to prepare your students, teachers, and staff for a successful testing experience.</p>
<p><b>Creating a Positive “Test-Ready” Culture</b></p>	<p>Use this workbook to help create a positive testing culture and environment that celebrates student growth and helps students feel safe and encouraged to perform their best.</p>

Section 3

## ASSESSMENT INSTRUMENTS

Workbook

Selecting the Right Assessments

Description

This workbook walks through recommendations for choosing the best assessments to complete your assessment program and to provide robust insights to support every learner's growth.

Section 4

## DATA AND INSIGHTS

Workbook

Data-Driven Administration

Description

Leverage this workbook to set clear, actionable targets at the district (or school) level and build systems and processes to analyze and monitor data across multiple campuses and grades.

Data-Driven Instruction

Ensure your teachers are maximizing their assessment data to guide instruction and intervention in the classroom. Use this workbook to consider best practices for scaling data-driven instruction throughout classrooms and school buildings.

## Section 1

# Assessing Your Assessments

The first step to building a balanced assessment program and healthy assessment culture is understanding your current assessment programs and processes. What programs do you have in place? What assessments are your teachers administering? Are you leveraging the full purpose of each assessment?

In this section, we offer best practices to help you build assessment systems and processes to obtain the right insights for all learners.



### GOALS

- Examine your assessment program from a holistic perspective, identifying the types, frequency, and format of each assessment at every grade level
- Understand the purpose of each assessment and build your staff's assessment literacy
- Create equitable identification processes using research-backed practices for English Language Learner programs, Gifted & Talented, and Special Education



## Assessing Your Assessments: District Assessment Survey

**Step 1:** Use the template below to summarize your overarching assessment programs and processes.

### What assessments do you administer at each grade level?

(Fill out the table below for one grade or use this downloadable template for all grades.)

School / Campus:				Grade Level:			
	Test Name	Subject	Format (Online, Paper)	Frequency / Administration Dates	Purpose of Assessment		
Summative							
Benchmark / Interim							
Diagnostic							
District Assessments (pre-unit / post-unit)							
Nationally normed							
Criterion- referenced							

Step 2: Respond to the reflection questions below.

1	<b>Do you feel as if you have a culture of “over-testing”?</b>
2	<b>How many of your schools administer the same district and nationally-normed assessments?</b>
3	<b>What areas of your assessment program are strong?</b>
4	<b>Where do you have opportunities to improve your assessment program?</b>
5	<b>What training do you currently give your teachers and leaders on the purpose of each district, nationally-normed, or criterion-referenced assessment?</b>

6	At the classroom level, how do you help your students understand the purpose of each assessment?
7	What additional assessment resources do you need at the district level to improve your assessment program?

### Why do these questions matter?

The perception of “over-testing” occurs when students and teachers don’t understand the “why” behind each assessment or when you are assessing the same skills multiple times. An “over-testing” culture can quickly lead to wasted data and negative attitudes towards assessments.

To create a Balanced Assessment Plan, all stakeholders (administrators, teachers, students, and parents) must understand the purpose of each assessment. What information is the assessment providing? How do you plan to use the data? What is the difference between each of these assessments, and how will you use the data to further student development and growth?



## Best Practices and Recommendations

### Next Steps for My District

My District / School...

Recommendations...

...has a culture of “over-testing”

- ✔ Revisit the purpose of each assessment and the skills assessed. Are multiple assessments serving the same purpose and/or measuring the same skills?
- ✔ Review the different types of data gathered from each and the format. Are 2 or more assessments providing the exact same information in the same format?
- ✔ Is your district giving too many of the same type of assessment? Could a diagnostic assessment be administered to replace an additional summative assessment, for example, to identify initial student knowledge and transform classroom instruction?
- ✔ Is the data being used from each assessment?
- ✔ What tests are required by the district versus those selected at the school level? Are these tests overlapping in content and purpose?



## Assessing Your Assessments: Identification and Referral Processes

Respond to the reflection questions below.

1	<p>What is your process to determine which students should be referred to English Learner (EL) services? What assessments do you use?</p>
2	<p>What is your process to determine which students are eligible for advanced academic programs and/or Gifted &amp; Talented programs? What assessments do you use?</p>
3	<p>In what content areas and/or for what purposes do you universally screen students?</p>
4	<p>Do you use an ability assessment, different from an achievement assessment, to understand student aptitude and capacity to learn?</p>
5	<p>Are subpopulations of students equitably identified for Gifted &amp; Talented and advanced academic programming? What about for Special Education?</p>



## Why do these questions matter?

Identification practices for special services can unintentionally misplace or misdiagnose students if the right assessments are not properly utilized. For example, without the proper identification process, English Language Learners can be diagnosed with a learning disability, when really they lack confidence in the English language. Similarly, students from lower socioeconomic backgrounds might perform poorly on achievement tests (due to lack of preparation and resources), so might not test into advanced academic programming.

To equitably identify students for special services, we must ensure that we use universal screening alongside the right combination of assessments to understand every student's innate learning needs and potential.

## Next Steps for My District

My District / School...	Recommendations...
<p>...does not equitably identify students for Gifted &amp; Talented or advanced academic programming.</p>	<ul style="list-style-type: none"> <li> <span style="color: green;">✔</span> Implement the following, research-backed solutions to increase equitable identification:                             <ul style="list-style-type: none"> <li>• Universally screen all students using an abilities assessment such as Riverside Insights' <i>Cognitive Abilities Test™ (CogAT)®</i></li> <li>• Use an abilities assessment with multiple measures to comprehensively understand student aptitude</li> <li>• Leverage local norms to determine cut-off percentiles</li> </ul> </li> <li> <span style="color: green;">✔</span> Check out the Riverside Insights Solutions page for <a href="#">G&amp;T and Advanced Academic Program</a> placement.                             </li> </ul>

## Next Steps for My District

My District / School...

Recommendations...

...struggles to identify whether Emergent Bilinguals have learning needs or language needs.

- ✔ Implement the following, research-backed solutions to differentiate between learning and language needs:
  - Develop a comprehensive language profile of the student, including formal measures of language to establish proficiency and dominance using an assessment like the WMLS III or the WJ IV OL.
  - Investigate academic performance in native language to determine subject area strengths and weaknesses and what students can do when they leverage all their linguistic resources.
- ✔ Check out the Riverside Insights Solutions page for [English Learners](#).

...is over/under identifying Emergent Bilingual students for Special Education.

- ✔ Implement the following, research-backed solutions to equitably identify Emergent Bilingual students for Special Education:
  - Compare abilities to determine if a disability is present in both languages using assessments such as the WJ IV, Batería, or the WMLS III.
  - Conduct progress monitoring to assess response to linguistic/academic intervention using assessments such as *Logramos* or the WMLS III.
- ✔ Check out the Riverside Insights Solutions page for [Special Education](#).

...has difficulty determining whether a student has learning challenges or simply has not been exposed to relevant content.

- ✔ Implement the following, research-backed solutions to determine if a student has learning challenges:
  - Examine ability with reduced language demands using an assessment like the *CogAT*.
  - Build language skills to enable students to gain the skills they need to access the curriculum.
- ✔ Check out the Riverside Insights Solutions page for [Special Education](#).

## Section 2

# Testing Culture and Environment

Testing culture and environment can make or break student performance on test day. How do you ensure your students, families, teachers, and staff are prepared for a focused, smooth, and calm testing environment? What processes and practices do you have in place to promote smooth operations and logistics? How do students and teachers feel on testing day?

In this section, we provide questions and best practices to help you reflect on your current test day preparation and assessment culture.



### GOALS

Survey your academic and operational preparation practices and identify opportunities to better prepare students, teachers, and staff for test day

Assess your testing culture and determine if your culture sets students up for long-term growth and success



Testing Culture and Environment:

## Preparing Students and Staff for Testing Time

Respond to the reflection questions below.

1	Do you have an assessment prep calendar? If so, when do you provide it to teachers and staff?
2	What does your school do to academically prepare students for an assessment?
3	How does your school prepare students for assessment-day logistics?
4	How does your school prepare teachers and staff for assessment-day logistics?
5	How do you identify and train proctors?

6	<b>What operational needs does your school have for assessment day (i.e. laptop distribution, breakfast/snack/lunch times, etc.)?</b>
7	<b>What is your typical schedule for assessment day?</b>
8	<b>How do you mitigate the stress for students and teachers during the assessment process?</b>
9	<b>How do you leverage all stakeholders (parents, teachers, students) during the testing process?</b>
10	<b>What is your plan to address testing irregularities?</b>

## Why do these questions matter?

Preparation (both academically and operationally) is key to building a testing environment and culture where students and teachers feel set up for success. From an academic perspective, students should feel confident with the assessment question types and format before beginning the test. Operationally, teachers and staff must be well-versed in testing logistics so that the test day can run smoothly.

The small details contribute to (or detract from) an overall test day feeling that is calm, focused, and student-centered and can make or break student performance.

## Next Steps for My District

My District / School...	Recommendations...
<p>...does not have clear operational systems in place for assessment days.</p>	<ul style="list-style-type: none"> <li>✔ Document the steps for each action item on assessment day. For example:               <ul style="list-style-type: none"> <li>• How will testing materials be distributed?</li> <li>• What time will teachers arrive to pick up their testing materials?</li> <li>• Who will distribute testing materials?</li> <li>• How will you track test booklet and test answer sheet count each day?</li> </ul> </li> <li>✔ Provide teachers with a testing calendar to administer the right test on the right day</li> <li>✔ Clearly outline what happens during an assessment, including:               <ul style="list-style-type: none"> <li>• What is the official time to begin testing?</li> <li>• Do you have enough proctors in the classrooms and hallways?</li> <li>• How will teachers alert an administrator during testing of an emergency?</li> <li>• How are you keeping your hallways and buildings quiet during testing?</li> </ul> </li> </ul>
<p>...spends too much time test-prepping with students.</p>	<ul style="list-style-type: none"> <li>✔ Reflect on the amount of time teachers are spending teaching vs. “test-prepping”</li> <li>✔ Encourage teachers to continue teaching the curriculum, without focusing on upcoming tests</li> <li>✔ Integrate a few practice problems as spiral review into daily at-bats</li> <li>✔ Transparently discuss the assessment purpose with students and highlight how the data will support their growth</li> </ul>

## Next Steps for My District

My District / School...	Recommendations...
<p>...does not spend enough time test-prepping with students.</p>	<ul style="list-style-type: none"> <li>✔ Help students and parents understand the purpose of each assessment:               <ul style="list-style-type: none"> <li>• Why are they taking the assessment?</li> <li>• How will the data be used?</li> </ul> </li> <li>✔ Remind students to prepare for testing day at home by getting a good night's sleep and eating breakfast</li> <li>✔ Provide students practice problems in class to ensure understanding of question type and skill measures</li> <li>✔ Proactively build a positive testing culture by helping students prepare for the testing schedule and change in routine</li> </ul>
<p>...feels stressful and frenzied on testing days.</p>	<ul style="list-style-type: none"> <li>✔ Plan for testing days together as a staff, discussing:               <ul style="list-style-type: none"> <li>• Assessment day logistics</li> <li>• The purpose of each assessment</li> <li>• "After testing" celebrations</li> </ul> </li> <li>✔ Plan time for teachers and students to ask questions               <ul style="list-style-type: none"> <li>• Each class should have a designated time to discuss the assessment and surface any fears / worries</li> </ul> </li> <li>✔ Create a schoolwide assessment culture, where all classes in the building support the testing environment, even if they aren't testing               <ul style="list-style-type: none"> <li>• A quiet, calm testing environment with a comfortable temperature alleviates student and teacher anxieties</li> </ul> </li> <li>✔ Sharpen logistics and operations to ensure teachers have the right testing materials and are comfortable with administration steps</li> <li>✔ Provide additional recess and special treats to show appreciation for students giving their best</li> </ul>

## Testing Culture and Environment: Creating a Positive “Test-Ready” Culture

Respond to the reflection questions below.

1	How does your school/district intentionally build a positive testing culture?
2	What do you want testing day to look like, sound like, and feel like for students and teachers?
3	How do you celebrate student growth and ensure that students are supported and encouraged throughout the testing preparation and administration processes?

### Why do these questions matter?

Culture directly reinforces student mindset, confidence, and mental well-being. Too often, testing cultures and environments add unnecessary stress to students that create anxiety, unhealthy nerves, and lack of confidence. Over time, these negative cultures impact student well-being and mental health. Positive testing cultures, however, celebrate student growth, help students reflect on their own strengths and areas of opportunity for improvement, and provide students with the self-regulation tools and positive self-reinforcement strategies that build grit, resilience, and healthy social and emotional competencies.

## Next Steps for My District

My District / School...

Recommendations...

...has students that get very anxious on test days.

- ✔ Be transparent and clear about what to expect on testing day.
  - Prepare the student ahead of time for test day using a “what to expect” chart
  - Talk to the students individually or in a small group prior to test day to answer their questions and alleviate their fears
  - Discuss the purpose of each assessment and the anticipated data usage
  - Encourage students to do their best

...does not feel structured, focused, and positive on testing day.

- ✔ Develop systems that reinforce a positive, calm testing environment.
  - Offer extra recess or other “testing day treats” following assessment administration
  - Ensure all teachers know the testing plan ahead of time
  - Prepare administrative tasks in advance so can help students settle into testing day



## Section 3

# Assessment Instruments

Not all assessments are created equally. Assessments vary with the amount of rigorous research behind them, the range of testing accommodations, and the options for data reporting. Some assessments offer more equitable administration experiences for diverse learners, and some assessments provide both national *and* local norms. When selecting a new assessment, it's important to do your research and understand how the assessment was created, how the normative data is collected, and how the data is scored.

In this section, we provide questions and best practices to help you choose the best assessment for your program.



### GOALS

Reflect on current practices for choosing different assessment instruments

Create protocols to evaluate assessments and ensure all students, regardless of learning style, have an equitable opportunity to perform to the best of their capabilities



Assessment Instruments:  
**Selecting the Right Assessments**

Respond to the reflection questions below.

1	<p>What assessment features do you consider before adopting a new assessment (i.e. norms-referenced, multiple languages, etc.)? Of these features, which are the most important?</p>
2	<p>Does your school have admissions tests? How do you determine what assessments to use for admissions purposes (if applicable)?</p>
3	<p>Do you have different criteria for choosing assessments at different grade levels?</p>
4	<p>Do you have criteria for choosing assessments to support English Learners?</p>

5	Do you have accessibility criteria for diverse learners and/or students with special education needs?

### Why do these questions matter?

Assessment data provides guidance for administrators and teachers on the effectiveness of curriculum and instruction and the extent of student learning.

Since assessment data is used to measure student growth and make decisions about a student’s academic trajectory, it’s important to understand how your assessment is designed. For example, if you’re using national percentile ranks to make decisions about student performance, read the assessment’s research guide to ensure the norm sample is representative of the national population. An unrepresentative norm sample could skew the normative data and leave you with an incomplete picture of student performance.

The right assessment tools also provide key insights to drive differentiated instruction. Proper differentiation maximizes learning time while minimizing testing time and increasing student engagement. Before choosing an assessment, it’s important to identify the use of the data and ensure that an assessment’s reports highlight the needed data and that the assessment accommodations will allow all students, regardless of background and learning style, the opportunity to demonstrate their knowledge or aptitude.

### Next Steps for My District

My District...	Recommendations...
<p>...is not getting the right data from an assessment.</p>	<ul style="list-style-type: none"> <li>☑ Before choosing a new assessment, do some prework:                             <ul style="list-style-type: none"> <li>• How will you use the assessment data? Identify the specific type of data you need (i.e. formative, summative, diagnostic, etc.) and outline the data’s use cases</li> <li>• Specify the criteria that align with your district needs, including:                                     <ul style="list-style-type: none"> <li>• Requirements for testing accommodations</li> <li>• Funding limitations</li> <li>• Preferred reporting formats</li> </ul> </li> </ul> </li> <li>☑ Speak to an Assessment Consultant at Riverside Insights to find an assessment that matches your data needs</li> </ul>

## Section 4

# Data and Insights

Assessments are only helpful tools if the data is utilized effectively. Frequently, assessment data is leveraged only for identification or placement and scores are disregarded after administration. Similarly, teachers do not maximize the use of each assessment report to fully understand their students' learning patterns, academic strengths, and differentiation needs. The data analysis time upfront will ultimately save time in the classroom by helping educators determine a starting point and a differentiated plan of action to drive student growth.

In this section, we outline reflection questions and best practices for making data-driven decisions at the district and school levels and data-driven instruction within classrooms.



### GOALS

- Create an overview of your teachers' data analysis practices
- Build in the time and processes for your teachers to analyze the data
- Understand student learning through a holistic model of academic data points



Data and Insights:  
**Data-Driven Administration**

Respond to the reflection questions below.

1	How do teachers and leaders combine assessment data to provide a holistic understanding of student growth?
2	How does assessment data across sub-populations of students compare? How do you respond to gaps between sub-populations?
3	What practices do you leverage to help students have ownership over their data and individual performance?
4	How do you train teachers on using different scores on the reports?

**Why do these questions matter?**

These questions help administrators reflect on data analysis practices across a school or district with a specific focus on building sustainable processes to maximize the use of data. Strong data analysis practices begin with clarity at the administrative level and the implementation of school-wide systems to understand student performance, engage students with their own growth, and maximize teacher capacity for reading assessment reports and utilizing them for differentiation.

## Next Steps for My District

### My District...

### Recommendations...

...has gaps in sub-population performance.

- ✔ The following practices can support with closing performance gaps between different sub-populations:
  - Combine multiple measures to evaluate student performance (i.e. ability and achievement data) instead of relying on a single measure
  - Utilize local norms instead of national norms or a set cut score to narrow the reference pool and compare students from a localized community
  - Evaluate accommodations and implement the necessary accommodations to meet student needs

...does not maximize the use of assessment reports.

- ✔ Build practices into the school day for teachers to use the reports for instructional planning, such as:
  - Organize grade-level or subject-specific PLCs (Professional Learning Communities) with a facilitator to guide collaborative data analysis and discussion
  - Coordinate professional development at the district to review district data, practice using assessment reports, and plan for implementation of data-driven systems at the school level
- ✔ Make data analysis a priority for your teachers by building time for it into the school day.

...does not hold teachers accountable for using data.

- ✔ Key practices can help administrators hold teachers accountable for utilizing data in the classroom. Example practices include:
  - Use PLCs as opportunities to reflect on data-driven practices, share feedback with teachers, and highlight best practices across grade-levels or departments
  - Observe teachers in real-time using data to guide instruction and provide regular feedback
  - Work with teachers to set goals for specific students based on data and monitor student growth over time

## Data and Insights: Data-Driven Instruction

Respond to the reflection questions below.

1	Do you use PLCs (Professional Learning Communities)? If so, how frequently do PLCs meet? What type of data do teachers look at within a PLC?
2	How do teachers use data and insights from each assessment to differentiate instruction in the classroom?
3	How does data support targeted interventions and RTI / MTSS systems?
4	How do you communicate assessment results to parents?
4	How are students engaged in their data?

## Why do these questions matter?

Since teachers are directly working with students to drive student growth, it's essential that they have a strong understanding of the assessment data, reports, and implications. These questions help administrators implement the right systems and practices for teachers to leverage academic data for individualized instruction and maximize growth for all students.

### Next Steps for My District

My District...	Recommendations...
<p>...does not have PLCs or does not have a strong facilitator for the PLCs.</p>	<ul style="list-style-type: none"> <li>✔ Encourage school leaders to use PLCs as a collaborative environment for data analysis and action planning</li> </ul> <p>To create a robust PLC, follow the steps below:</p> <ul style="list-style-type: none"> <li>• Set aside time biweekly for the PLC</li> <li>• Designate a grade-level, department, or school leader to facilitate discussion within the PLC</li> <li>• Set a goal for each meeting</li> <li>• Bring data and/or student work to the meeting</li> <li>• Hire a data specialist to support with data analysis</li> </ul>
<p>...teachers do not know how to pull reports.</p>	<ul style="list-style-type: none"> <li>✔ Before conducting any data analysis, ensure that all teachers have access to the reporting dashboard. Train teachers on logging into the system and pulling necessary reports</li> <li>✔ Contact the assessment vendor, or Riverside Insights if applicable, for training resources</li> </ul>
<p>...parents don't understand the reports.</p>	<ul style="list-style-type: none"> <li>✔ Create resources and training opportunities just for parents, such as:               <ul style="list-style-type: none"> <li>• A parent webinar explaining the assessment, score reports, and data interpretation</li> <li>• A session at Parents' Night on upcoming assessments and score interpretation</li> <li>• A parent report to assist parents with reading the reports</li> </ul> </li> </ul>



For more information or to speak with an Assessment Consultant, visit: [www.riversideinsights.com](http://www.riversideinsights.com)



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