



TRENDS AND OPPORTUNITIES IN K-12 ASSESSMENT: THE NEW ERA OF ESSA

BY: ERIC SKUSE



The passage on December 10, 2015 of the Every Student Succeeds Act (ESSA) was the culmination of a long-running movement away from a completely top down, standard-based approach to measuring student performance. ESSA returns more autonomy to state and local education agencies, and is likely to accelerate the pivot away from high stakes summative tests to new measures and assessment methods to be decided upon primarily by states. This means schools are looking for a different mix of products and services from vendors in the K-12 space, and recent investment has spurred an ever more vibrant and complex market for K-12 decision makers to navigate. The boom in VC funding for education technology startups has lit up the market with innovative curricula and assessment products, pushing both technical and pedagogical boundaries and allowing K-12 stakeholders to rethink possibilities for their institutions and students. Buzzwords like “personalized learning” abound as new entrants leverage technology to provide new products and services aimed at K-12 institutions and educators. Ongoing diversification of assessment and performance measurement needs will create an increasingly complex market for both K-12 institutions and vendor partners to work in.

Emerging Strategy recently conducted a study into changing trends in K-12 assessment. We interviewed a variety of stakeholders and thought leaders to gain insight into what schools need to succeed in today’s diverse K-12 curricula and assessment landscapes. After completing our study, three promising growth areas stand out from the crowded field of experimental offshoots: formative assessments, performance-based assessment and non-academic measures. Non-traditional assessment techniques are gaining significant traction in a K-12 landscape recently upended by political reforms and advances in technology. The objective of this paper is to cut through the noise and provide clarity on how vendors and other K-12 stakeholders can position themselves in this new era of diversification in K-12 curricula and assessment.

What is a Formative Assessment?

Assessments used to monitor student learning to provide ongoing feedback that can be used by instructors to improve their teaching and by students to improve their learning²

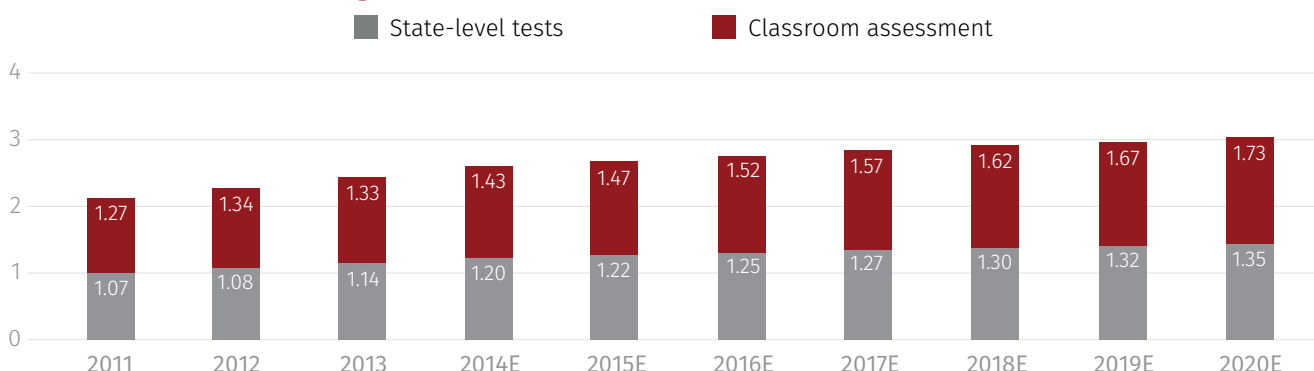
Formative Is The Way Forward

Demand Trends for Formative Assessment Products

Opposition from parents and educators against the perceived burden of high stakes summative assessments associated with Common Core and other state standards has led to significant changes in the K-12 assessment world. According to a Gallup Poll conducted in September 2015, 67%¹ of public school parents believe there is too much testing at their child's school.

In fact, there are clear signs of K-12 institutions and vendors shifting their focus away from traditional summative tests to more classroom-based tests, also known as formative assessments. According to an estimate by Simba Information, formative assessments are projected to be a growth area in the K-12 space — the market for classroom assessment is projected to reach USD 1.7 billion by 2020. Established companies and new entrants are shifting their strategies and competing for market share in this rapidly changing space.

K-12 Testing and Assessment Market, 2011-2020E* (USD Billions)



*Note: E = expected

Source: Simba Information and BMO Capital Markets, 2014

1 Education News, 2015

2 Eberly Center, Carnegie Mellon University, 2016

Major Assessment Vendors Brace For Change

In response to the pivot away from high stakes summative tests, McGraw Hill Education sold off its entire summative testing business to Data Recognition Corporation in July 2015. Additionally, another giant of the publishing world, Pearson, has sustained losses in the tens of millions for lost bids or canceled contracts of state-level summative assessments in New York, Texas and Florida³. Incumbent test publishers must also navigate this landscape alongside a host of new entrants. Upstart companies such as MasteryConnect, Illuminate Education and Performance Matters are expanding their customer bases by offering flexible formative assessment platforms. These platforms not only allow teachers to deploy highly customizable, bite-size assessments in the classroom, but they also provide analytics dashboards to allow teachers at-a-glance insight into student performance. The formative assessment space is poised to expand in light of the new flexibility afforded to states and districts by ESSA, but this trend is just one of many having an impact on how K-12 institution and schools will come to define success in the near future.

“We are leveraging the tools in many schools in our district quite well because of the creative ways we’ve set up our system. We’re loading into the system other metrics which include GPA, grades by course, and then we’re loading in attendance and behavior data. We’re using the system’s early warning indicators to identify students who, for example, fail one or more classes, students who have attendance issues. And then because of the way the tool works, you can then look at student achievement data on assessments in comparison to all of those things.”

-Director of Curriculum, Instruction and Assessment, and a Performance Matters User in MN Public District



Performance-Based Assessment (PBA)

The Next Generation Of Assessment

The steady drumbeat of derision toward the one-size-fits-all summative assessment as an inadequate or partial measure of student learning outcomes is allowing other measurement tools to have a seat at the table. Today, the inclusion of a wider array of measures of student performance is now seen as critical to providing a comprehensive look at the performance of individual students, as well as schools and districts. Performance-based assessment (PBA) is one of the more promising movements percolating around the country, elevating catchphrases such as “deeper learning”, “competencies” and “authentic assessment” into the K-12 lexicon. But today’s catchphrase could very well be tomorrow’s status quo. What do these early experimental efforts mean for the future of K-12 curricula and assessment?

What are Performance-Based Assessments (PBAs)?

A set of strategies for the acquisition and application of knowledge, skills and work habits through the performance of tasks that are meaningful and engaging to students⁴

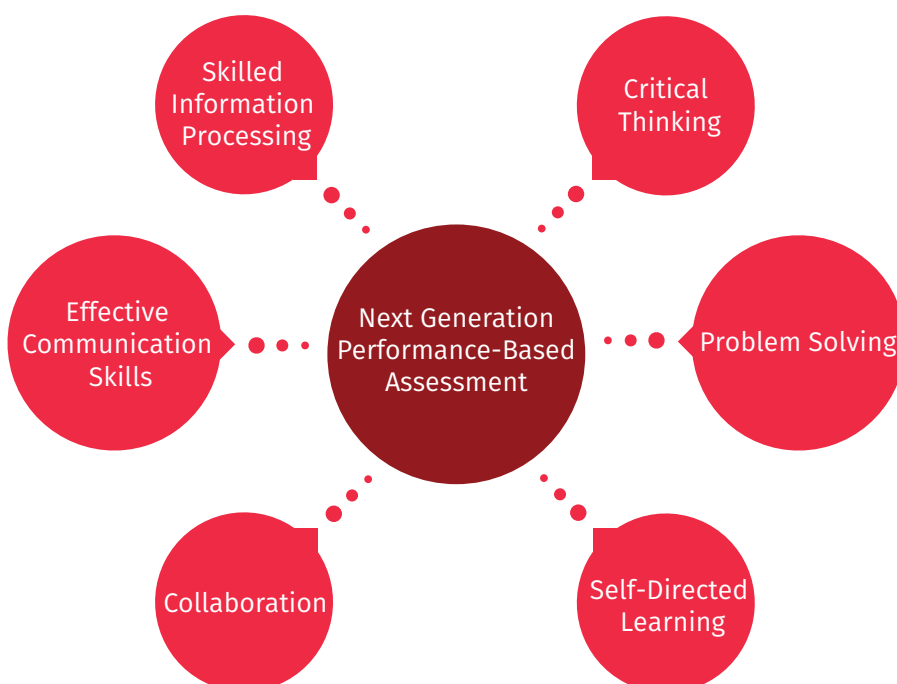
⁴ Association for Supervision and Curriculum Development (ASCD), 2016

“The thing about performance assessment is that it very much requires that we increase teacher assessment literacy. In a standardized test the teacher’s assessment literacy doesn’t really matter, but in a performance test it really is critical. Kids showing what they can do and teachers being savvy and literate in how to design and evaluate an assessment that can be rigorous enough is key.”

-Director, Christensen Institute for Disruptive Innovation

PBA Measures Crucial 21st Century Skills

In a nutshell, deeper, or authentic, learning and assessment goes beyond measuring content knowledge and into measuring students’ ability to apply that knowledge in real-world contexts. An example might include creating a blog to track and comment on the political world to demonstrate content knowledge in an AP Government class. Content knowledge can be shown by writing that blog, but other higher order skills can as well. Skills such as collaboration, problem solving, effective communication skills and critical thinking are important focal points of PBA and creating reliable tools to measure them is increasingly being talked about as we move from the era of No Child Left Behind (NCLB) into the new era of ESSA. This is not necessarily a new or innovative idea, rather the political environment for including non-traditional measures and assessments in the mix, including PBA, has never been more accommodating. Additionally, better technology and IT infrastructure makes scaling these complex systems much easier than before. There is a clear market opportunity for products or services which enable this process of designing, implementing and administering next generation assessments such as PBA. The potential for adoption of PBA is clear, but the time horizon for widespread implementation of these measures is less certain.



Early Successes, But A Long Road Ahead

Without question, there is a long way to go before performance-based assessments go from experimental model to mainstream. A myriad of obstacles, such as scalability, reliability and a greater need for professional development, stand in the way of significant adoption of these types of measures in K-12 schools at present. There are however, some pioneering institutions who are providing a glimpse of what a system involving performance-based assessment might look like. One of the more advanced efforts into implementing PBA can be found in New Hampshire, where seven districts and one charter school piloted a program merging performance-based tasks with traditional standardized tests aligned to Common Core State Standards (CCSS)⁵. Another notable effort into PBAs is ongoing in the state of New York, a state with one of the highest test refusal rates in the country — more than twenty percent for the spring 2015 rollout of Common Core-aligned tests⁶. The New York Performance Standards Consortium is a group of 28 middle and high schools across the state that rely on teacher-created assessments and rubrics to gauge student progress in place of traditional summative assessments.

Parents and teachers have given positive feedback to this unique combination of locally-developed performance tasks with a reduced number of standardized tests, but there are certainly tradeoffs to using the performance tasks in place of standardized tests. Ensuring tasks are administered and assessed objectively across an entire state is a challenge, as is developing tasks that adequately measure what they intend to measure. Add to these challenges the need for better assessment literacy among teachers, or as one New Hampshire official put it “educator judgment”, and the prospect for implementing PBA for other states appears daunting.

⁵ Ed Week, 2015

⁶ Capital New York, 2016

Facebook Enters The Fray

The daunting task of reforming K-12 curricula and assessment hasn't deterred some intrepid institutions from experimenting, and the top down, state-centered model isn't the only one out there. Some experimental K-12 institutions have based their entire instructional models on PBA, such as Summit Public Schools, a California charter network which is developing a custom learning and assessment platform focused on "project-based learning". The program curriculum and assessment scheme heavily focuses on experiential learning through projects, and is delivered to students in a personalized fashion via Personalized Learning Plan, a software platform developed in partnership with Facebook. Summit now offers the PLP platform to public schools free of charge in a much discussed pilot program called Basecamp — it is being used across 19 districts in 10 states for the 2015-16 school year. PLP includes 197 deeper learning projects and over 700 "Playlists" (libraries of learning content, such as videos, articles, etc.), as well as tools that let teachers adjust the curricula or upload their own. Teachers participating in Basecamp have access to a wide range of tools and content to foster experiential learning through having students solve authentic problems. For example, ninth grade math students studying algebra use mathematical models to predict growth in the stock market rather than solely grinding away at practice problems. Innovative, student centered models, such as those being piloted in the Basecamp program are generating tremendous interest and could eventually influence the way student performance is measured across the nation.

What are Non-Academic Measures?

Measures of social and emotional indicators such as engagement, curiosity, perseverance or even safety which can be reliably tested and tracked through assessments

Non-Academic Measures

The Search To Provide A More Holistic View Of Progress

One interesting provision of ESSA is the requirement for states to include at least one “non-academic measure” of school performance in their annual progress tracking efforts. Non-academic measures must be included to provide a more holistic picture of K-12 performance, though it is entirely up to local education agencies to decide what this measure should be, and how to measure it. The thoroughly researched measures of student “grit” and “resilience”, or social and emotional learning (SEL) are being evaluated as possible tools to provide an additional lens into school performance. Although ESSA allows a great deal of latitude for localities to decide what works in their communities, leadership in the area of non-academic measures is coming from well-established institutions in K-12 education. The National Assessment of Educational Progress (NAEP) announced plans to begin measuring non-academic data from students beginning next year. The OECD’s Program in International Assessment (PISA) also recently included questionnaires on self-esteem, school climate and student-teacher relationships.

Local efforts to measure non-academic indicators in schools are already taking root among some pioneering schools and districts. A group of school districts in California comprising the largest urban districts in the state, the CORE network, is advancing a plan to tie measures of SEL to school accountability. CORE’s efforts in tying SEL data to accountability measures has become a controversial plan even among leading researchers in the field — data from questionnaires on non-cognitive measures such as SEL are easily manipulated and attaching accountability to these results only incentivizes that sort of manipulation. Even though connecting these measures to accountability does pose problems, there is clear interest among K-12 stakeholders in pursuing measurements such as SEL to capture a more holistic view of progress. The Gallup Student Poll measures non-academic indicators like well-being and engagement through a twenty-question survey. Last year, more than 875,000 students took it nationwide, and some districts plan to add surveys like this into the mix of student performance measures. As these non-academic measures become more commonly used, expect this trend to further contribute to the diversification of state and district needs.

Flexible, Data Agnostic Platforms Provide Scalability

Non-academic measures are also finding their way into assessment products from niche edtech companies. With the number of specialized companies growing every year, a more diversified market of products oriented toward non-academic measures is certain to develop. Measures like school climate, self-esteem, student-teacher relationships and self-direction could all see increased use in the near future. Local needs will dictate what type of non-academic measures schools will decide to track but one thing is for certain: products providing an agnostic platform, able to accommodate a variety of non-academic measures within K-12 assessment products will be a highly valued aspect of product design going forward. Vendors who provide ways to seamlessly incorporate content and data for non-academic measures will enjoy clear advantage due to the scalability across localities with varying needs.

“ESSA is going to be crazy for vendors. NCLB and Common Core made this a much simpler landscape. With ESSA giving the states the authority to really do whatever they want. Well there are certain things they have to do, certain things they have to track, but other than that they are free to come up with their own wacky stuff. Again, that speaks to the importance of platforms being really arbitrary about the measures that they report on.”

-Practitioner in Residence,
Center on Reinventing Public
Education

Aligning Products With Emerging Needs

Two Opportunities For Competitive Advantage In A New Era

On the vendor side of the equation, diversification of assessments and performance measures used in different states means that flexibility is now a key point of competition. Allowing assessment content and data from multiple, disparate sources to be generated and manipulated at will by users is an increasingly important feature for states and K-12 districts. Inclusion of data on non-academic measures is just one example of the need for different types of data to be measured in tomorrow's assessment systems. Products that are able to include multiple student performance measures will have a competitive advantage over legacy systems designed for the NCLB era. A second point of competitive advantage is the ability for content and/or platforms to measure higher order skills, or "deeper learning". One of the main draws of a performance-based framework like the one used in the Summit Public Schools/Facebook partnership, is that it fosters experiential learning, or learning-by-doing, which is particularly suitable for the sciences (including computer science), long an area of focus for federal and state education funding. Products and services which enable experiential learning and PBA are positioned to benefit from widespread demand for more authentic learning and assessments. Opportunities can be seen in tailored platforms supporting PBA or formative assessment, content repositories for new types of content like tasks/projects and even in professional development services to support assessment literacy or other emerging needs among educators adapting to new models.

States are already aligning themselves to innovative new models, such as those including PBA and other non-traditional measures in order to compete for upcoming Department of Education waivers for states who wish to experiment with non-traditional measures of student performance in pilot programs. Those states who have experience with implementation of measures, such as New Hampshire and New York, stand a better chance at securing one of the seven waivers due to be issued in the near future. The DoE's competitive application process for waivers on experimentation around new measures means states have to put their best foot forward with regard to use and implementation of such measures, and well-positioned vendor partners are taking advantage of these opportunities.

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China & Asia Headquarters

Shanghai

153 Jumen Road Block 8, Suite 301
Huangpu District, Shanghai, China 200023

Tel: (+86) 21 6191 1101

Email: info@emerging-strategy.com

Connect With Us

Explore our website: www.emerging-strategy.com

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