

# Design Stories of Six Experienced Teachers Designing their Formative Assessment Plans

Online Resource 1: Supplementary material to the article:

Designing formative assessment that improves teaching and learning, what can be learned from the design stories of experienced teachers

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|                              | Patricia                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Tracy                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Stuart                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Bernadette                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Lisa                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Jenna                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
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| 1.<br>Describing the context | <p>Chose an existing series of lessons for a fifth-year class with objectives which are still difficult for students where FA can hopefully contribute.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p>Chose an existing series of lessons and objectives that is part of a coherent planning for all years. She chose the first series of the year because she wanted to make a good start and she chose a second-year class because that leaves her with more room for adjustment and improvement than the higher classes would.</p>                                                                                                                                                                                                                                                                                                                                                   | <p>Used the lessons for a chapter that took place at the right moment to align with our interviews. Because he only has a first-year class.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p>Only teaches a first-year class and used an existing series of lessons that took place at the right moment to align with our interviews and that has been improved every year. This series of lessons is complete with objectives and formative activities and will be concluded with a test.</p>                                                                                                                                                                                                                                                                                                                                                           | <p>Used existing series of lessons and learning objectives for the first chapters of the year in a first-year class.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p>Used existing lessons of two related chapters for a fifth-year class where she already had a clear vision of what she wanted to learn, check, and test.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|                              | <ul style="list-style-type: none"> <li>- Used an existing series of lessons to build the formative assessment plan on.</li> <li>- Made changes to the lesson plans if this seemed necessary during the planning of formative assessment.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                     | <ul style="list-style-type: none"> <li>- Spoke with others about learning objectives to improve them.</li> <li>- Made a timeline.</li> <li>- Put learning objectives and criteria for success at the end of the timeline.</li> <li>- Added a moment for clarifying expectations and reflection.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>- Analyzed and rewrote the learning objectives of the textbook chapter.</li> <li>- Analyzed former materials and formerly encountered misconceptions to formulate criteria for success.</li> <li>- Divided objectives and criteria for success over the lessons for this chapter.</li> <li>- Added new concepts, jargon, and possible misconceptions to each lesson.</li> </ul>                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"> <li>- Designed and adjusted the lessons, objectives, criteria for success and formative activities over the last four years.</li> <li>- Made a timeline to specify the checkpoints for all students and what learning objectives, decisions, data collection and follow-ups were linked to these checkpoints.</li> </ul>                                                                                                                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li>- Checked whether the learning objectives were still relevant and if they needed adjustments.</li> <li>- Decided to start off with a certain number of lessons but to feel free to adjust this based on how everything worked out.</li> <li>- Described how she wanted to explicit expectations to students. Expectations about the learning objectives as well as an explanation for students why and how she would work with formative assessment.</li> </ul>                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li>- She used the learning objectives from the textbook to find overarching learning objectives.</li> <li>- Based on those learning objectives and corresponding criteria for success she planned the number as well as the content of the lessons she thought was necessary to accomplish these objectives and the corresponding formative assessment.</li> </ul>                                                                                                                                                                                                                                                                                                                        |
| 2.<br>Planning checkpoints   | <ul style="list-style-type: none"> <li>- Patricia and her colleague focused three checkpoints on a selection of the learning objectives instead of all of them.</li> <li>- They chose learning objectives that are important for students because they form a considerable part of the final exam program.</li> <li>- To decide how many checkpoints, they wanted to incorporate they considered the learning function of these checkpoints as well. How could these checkpoints contribute to learning through ensuring there was enough repetition and structure regarding the learning processes concerning these learning objectives. For example, they decided to add a</li> </ul> | <ul style="list-style-type: none"> <li>- Tracy included all learning objectives that are part of the chosen period in one or more of four checkpoints.</li> <li>- She planned checkpoints at each moment where she had completed all general instruction for a certain learning objective.</li> <li>- She chose to have the first checkpoint as soon as possible because Tracy wants to know as soon as possible what students know and can do.</li> <li>- Checkpoint three is used to get information on how to differentiate because this is a moment where students start to diverge.</li> <li>- The last checkpoint includes all learning objectives to inform how to</li> </ul> | <ul style="list-style-type: none"> <li>- Stuart included all learning objectives that are part of the chosen period in one or more of two checkpoints.</li> <li>- The moments for these checkpoints are consciously chosen because Stuart considers it of great importance to adjust his teaching and learning when students have not acquired certain learning objectives at these points.</li> <li>- He planned one checkpoint halfway the series of lessons, to have a check on all sub-learning objectives that they focused on so far and to provide students and himself with an overview of what they have already learned and what is still in need for extra attention.</li> </ul> | <ul style="list-style-type: none"> <li>- Bernadette included all learning objectives that are part of the chosen period in one or more of three checkpoints.</li> <li>- Bernadette planned three checkpoints but feels free and sees the possibilities to add extra checkpoints when she thinks this is necessary.</li> <li>- She used the main learning objectives to decide what are the moments where students need to be at a specific point in their learning and she wants to check if they know and can-do certain things at that time. This together with if she sees possibilities for a relevant follow-up in subsequent lessons made her</li> </ul> | <ul style="list-style-type: none"> <li>- Lisa included all learning objectives that are part of the chosen period in one or more of five checkpoints.</li> <li>- She chose consciously to not plan too many checkpoints to make sure the plan was feasible and she as a teacher was not doing all the work, but students also had to take their responsibility.</li> <li>- If learning objectives are difficult, she uses a checkpoint for one learning objective and if not, she combines multiple learning objectives in one checkpoint.</li> <li>- The first checkpoint was planned in the first lesson to gain insight in students' prior knowledge on the topic and includes all learning</li> </ul> | <ul style="list-style-type: none"> <li>- Jenna planned checkpoints for all learning objectives but not for all criteria for success. She chose criteria based on the relevancy for future learning and if they include other criteria for success. <i>"Some criteria are so much related that if you test one you also test the three criteria that preceded this one"</i>.</li> <li>- To plan the checkpoints Jenna looked at her lessons to find out what are the moments when all criteria for success for a certain learning objective should be met. At those moments she wants to have students check for themselves if they possess all knowledge and skills to meet these criteria. Subsequently, she asks</li> </ul> |

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|                                                  | <p>third middle checkpoint to incorporate enough repetition for the students.</p> <ul style="list-style-type: none"> <li>- The teachers really needed to transcend the different subjects in this chapter to find out how to link different checkpoints and learning objectives in such a way that they could intensify learning.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p>prepare for the final test in the last lesson(s).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <ul style="list-style-type: none"> <li>- The second checkpoint in lesson eight is planned to find out how to best spend the final lesson before the test.</li> <li>- Besides these formal checkpoints the teacher uses student mini whiteboards and exit tickets in each lesson to quickly check how instruction is understood by students and where every student learning is going.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p>decide where to plan the checkpoints.</p> <ul style="list-style-type: none"> <li>- She divided the checkpoint evenly over the planned lessons based on the length of the course.</li> <li>- Besides these formal checkpoints she also uses other planned and unplanned activities that provide her with information on learning to adjust her teaching when necessary.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <p>objectives. This also provides students with a better notion of what is expected concerning the learning objectives.</p> <ul style="list-style-type: none"> <li>- Checkpoints two until four are planned when Lisa wants to wrap up learning on a certain paragraph in the book and go on to the next one.</li> <li>- The final checkpoint is a rehearsal test that checks all learning objectives.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p>students about the outcomes to find out if she can go on to the next learning objective or if she should adjust lessons to reach the current learning objective.</p> <ul style="list-style-type: none"> <li>- Jenna made sure that students had enough time to practice before she plans a checkpoint.</li> <li>- She really chooses which of the checkpoints are meant for herself to get a good overview of student learning and which are only for the students.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 3.<br>Designing rich data collection             | <ul style="list-style-type: none"> <li>- Although the plan does not show the rich data collection right away Patricia is confident that the activities at the checkpoints that help her to get insight in student learning are providing her with rich information. <i>"I think it's rich information because you certainly address the mistakes you saw and the corresponding underlying misconceptions. But while it is so self-evident that it is not mentioned here."</i> One example: The teachers underline all mistakes and then the assignment for students is to improve it. In this way both the teacher as the student gets a notion on what to improve and how to improve it.</li> </ul>                                                                                                                                                                                                                                                                          | <ul style="list-style-type: none"> <li>- Data-collection is designed as assignments that match the lessons. In this way students get to practice and at the same time it provides the teacher with the information she needs. For example, the first checkpoint is a speed-date activity that gives students the opportunity to practice their speech and provides Tracy with a good overview of student's speech when she walks around in the classroom during the assignment and gathers all written peer feedback afterwards.</li> <li>- Tracy says she foresees that other activities besides the checkpoints can provide her with new information about learning that can also be used to design follow-up lessons.</li> </ul>                                                                                                                                                  | <ul style="list-style-type: none"> <li>- Stuart uses mini whiteboards and exit tickets for checking what students pick up in a certain lesson and the checkpoints to challenge students to show what they have learned about the learning objectives overarching multiple lessons.</li> <li>- to accomplish this the assignments for the checkpoints are designed like test assignments and checked on the coverage of all desired learning objectives.</li> <li>- Stuart especially wants to use the checkpoints for students to get a good grip on what they have already accomplished and what they still need to learn and practice in upcoming lessons.</li> </ul>                                                                                                                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>- The main learning objective is being able to have a conversation so therefore it is logical if the data-collection is also through speaking.</li> <li>- However, there is not enough time in each lesson to give every student the opportunity to speak.</li> <li>- Bernadette solved this problem by using the checkpoints to bring together all information on student learning/speaking from all lessons until that moment. All conversations/ written assignments together provide Bernadette with a cumulative view of student learning concerning the learning objectives for speaking.</li> </ul>                                                                                                                                                                                                                                                                                               | <ul style="list-style-type: none"> <li>- Lisa chose different ways of collecting data about learning to insert variety in her lessons but also to make sure all students can show their learning even if they cannot write very well. She wants to check understanding and not how well students are able to write or formulate an answer.</li> <li>- Lisa combines what she learns from the checkpoints with what she sees in online assignments students make during the lessons to prepare her lessons.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                         | <ul style="list-style-type: none"> <li>- Jenna chooses to use a lot of different activities to collect data on learning for the necessary variety.</li> <li>- She chooses activities that yield the most for her and the students and that she is familiar with. She does not feel a lot of room to experiment with new activities because this class is so close to the final exam, she rather saves experimenting with new formative activities for the lower classes.</li> <li>- As an example of why it is important to ensure that data collection provides the right information, she mentions analyzing students' summaries: <i>"then what am I looking at whether they wrote things down correctly or whether they can summarize or not? (...) then I better give them tips than that I spend 45 minutes analyzing and then don't use it."</i></li> </ul>                                                                                   |
| 4.<br>Making room for adjustment and improvement | <ul style="list-style-type: none"> <li>- A follow-up in this plan usually meant that students could move along to the next subject if they had proven to master the learning objectives or got an extra well-suited instruction and assignments if they did not.</li> <li>- Another follow-up that was more student-driven was introduced in this plan where students that did master the learning objectives and the student who did not yet, worked together to improve incorrect assignments.</li> <li>- Patricia and her colleague spend a lot of time in preparing the room for adjustment and improvement. They made sure that the assignments and instructions that could be necessary after a checkpoint were available for students and teachers to work with.</li> <li>- Patricia told us how she managed to create room for adjustment and improvement in a packed curriculum. First, they decided to skip a lot of the comprehensive assignments until</li> </ul> | <ul style="list-style-type: none"> <li>- Tracy puts all gathered information about learning from checkpoint one and two together to decide how to design extra instruction and rehearsal assignments for a first rehearsal lesson that is planned after checkpoint two.</li> <li>- The information from checkpoint three is used to decide how Tracy can best differentiate in the follow-up lesson but also to design instruction and assignments for the second rehearsal lesson that follows. So, there are two lessons that are based on the outcomes of checkpoint three, one lesson with an opportunity to differentiate and one to rehearse.</li> <li>- The outcomes of the final checkpoint, a rehearsal test, are used in the final lesson where students can practice for the final test with assignments, they were advised to do based on the rehearsal test.</li> </ul> | <ul style="list-style-type: none"> <li>- Stuart uses the information about the learning of his students to continuously check whether his teaching needs adjusting.</li> <li>- However, because he sees this as a self-evident and continuous activity for all teachers, he only wrote down the planned follow-up for students in his formative assessment plan.</li> <li>- Stuart says that usually planning allows him to just give another lesson for students to repeat and where he can explain things again. If there is less time students must practice more independently.</li> <li>- Stuart prepared a follow-up for students that need extra help, extra instruction, assignments, and possibilities to ask questions, as well as students that need to be challenged more, deepening- and discussion assignments.</li> <li>- Stuart mentions a lot of examples of how he makes room for adjusting and improving teaching and learning.</li> </ul> | <ul style="list-style-type: none"> <li>- Bernadette explains that in this introduction course for a first-year class most of the students achieve the learning goals. Therefore, the follow-up focuses mostly on challenging the students.</li> <li>- For each follow-up lesson she has described assignments students can do when they want to progress further in their learning on this subject. <i>"What will challenge them and yield something extra?"</i></li> <li>- Students can choose from different assignments based on the outcomes of the checkpoints. They do not have to do all assignments. Bernadette suggests a follow-up activity for each student but also lets students themselves think about what the best next step is to take.</li> <li>- If students get a positive score they can advance to extra challenging assignments if they get a negative score because they cannot do it yet, they repeat more.</li> </ul> | <ul style="list-style-type: none"> <li>- The outcomes of the first checkpoint are only used by the teacher to find out about prior knowledge and adjust her instruction if necessary.</li> <li>- After each checkpoint, with exception for the first one, Lisa planned a lesson for adjustment and improvement, she calls it a recovery lesson.</li> <li>- At each recovery lesson there is room for extra instruction and Lisa provides students with information about what they can improve and what they can do to improve this. The responsibility to do this is left with the student.</li> <li>- Students receive individual feedback and if it appears that more students need help on the same things instruction and practice are done in a group.</li> <li>- In the rehearsal lessons there is also the possibility to use examples of answers, right or wrong, to show</li> </ul> | <ul style="list-style-type: none"> <li>- The decisions Jenna focuses on with her checkpoint are either 'Can I continue to the next learning objective?', 'how should I differentiate?' or 'What do we need to repeat in the following lessons?'.</li> <li>- Both Jenna and her students answer the question on what needs to be repeated in upcoming lessons based on the checkpoints.</li> <li>- Jenna uses the information on where students are in their learning in the same or next lessons to decide if she can continue or go back. And always has slides at hand in case it is needed.</li> <li>- However, she felt time pressure she finally decided that having enough time for repetition as part of formative assessment was so important that she really had to take time for this in her lesson planning. <i>"Because if you don't do that well, don't lay down that basis properly, you can start working on another"</i></li> </ul> |

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|                                                | <p>students mastered all reproduction assignments. Secondly, at given times they decided to postpone an instruction until they knew if students really needed an instruction. The checkpoints provided them with the information to decide for whom this instruction was needed or if they could skip an instruction all together which resulted in more time in the curriculum.</p> <p>- However, a difficulty that remains according to Patricia is when students will improve their learning too slowly and she really must proceed anyway.</p>                                                                                                                                                                                                                                                          | <p>- Although the precise possibilities for the rehearsal lessons are also still open Tracy did make sure she has rehearsal- and more deepening assignments ready to go. "The only question at hand is then who will do what and what will my role be. Am I going to focus on one group or the other? And that also depends on the number of students and where they are in their learning."</p> <p>- Because the lesson and formative assessment plan is very full Tracy foresees problems when lessons will be cancelled or when students gain too much delay. She really needs to experience in practice how she can best solve this.</p> | <p>For example, he skips (parts of) instruction if the checkpoints or other information on learning shows that it is not necessary anymore. Or instead of taking a whole lesson for rehearsal he lets a few students for whom this is useful watch tutorials and make extra assignments.</p> <p>- Stuart plans room for improvement for students in the successive lessons as well as in assignments in future lessons that take place after the chapters final test. <i>"That they understand that it is not just for now and the next test but that that learning is continuous"</i> Sometimes giving students room for improvement even means moving a test to a later moment.</p> | <p>- Bernadette makes sure however that every student gets enough repetition to move all learning to the long-time memory.</p>                                                                                                                                                                                                                                                                                                                                                                                                              | <p>students what they need to pay attention when answering on a test.</p> <p>- After the final checkpoint students also write down themselves specifically what they plan to do to improve their learning based on the outcomes of the rehearsal test. In preparing for the rehearsal test and in the final recovery lesson they really get the time to work on their improvement.</p> | <p><i>subject soon. But they still haven't mastered that, and next comes something that practically goes back to this, so the base must be set right."</i></p> <p>- According to Jenna especially the follow-up is what costs the most time in formative assessment but at the same time is very important.</p> <p>- On the other hand, formative assessment can also help her to decide what to skip if time is tight.</p> <p>- Jenna says making a formative assessment plan makes visible that these difficulties in making time for improvement and rehearsal exist and helps you to find ways to create more space for learning.</p> |
| <p>5.<br/>Taking a<br/>Helicopter<br/>view</p> | <p>- Patricia shows us that the helicopter view, checking if all necessary elements are present and reflecting on coherency, is not a final step in the design process but something that you do continuously during designing formative assessment plans.</p> <p>- Designing a formative assessment plan for Patricia is a reciprocal process of designing formative assessment as well as learning activities. She reflects on the lesson plans based on the formative assessment and reflects on the formative assessment plan from the learning perspective, how can it support learning in the best way.</p> <p>- She says she needs others to look at her design and conversations about these designs to keep improving the quality and coherency of her lessons and formative assessment plans.</p> | <p>- Tracy thought the check by taking the helicopter view at the end was very helpful to see if all elements were present in the formative assessment plan.</p> <p>- The consistency and coherency were already covered because she started off with an existing lesson plan.</p> <p>- According to Tracy the check on feasibility is probably something that becomes can only be done through the implementation of the formative assessment plan in practice.</p>                                                                                                                                                                         | <p>- Stuart states that he not only wants to take the helicopter view at the end of designing his formative assessment plan but also during and after the execution of the formative assessment plan.</p> <p>- Especially after the implementation can be valuable <i>"Only then you can really fly over it and notice whether the cohesion is good enough or whether there could be better coordination"</i> Reflection for example on the learning objectives, test results and common mistakes can then be used to improve the lessons and the formative assessment plan.</p>                                                                                                      | <p>- Bernadette does not mention that she made use of the helicopter view as a final design step. In her interview she just mentions that she evaluated and improved the total program each year and that she used the teacher learning community to take a closer look at these plans together with a colleague.</p> <p>- For the coherency she used the learning objectives as a guideline. <i>"that's why I specifically linked those learning objectives, I wanted them all to come back somewhere with the focus on speaking."</i></p> | <p>- Lisa tells us that the last design step is something you do continuously during the design process</p>                                                                                                                                                                                                                                                                            | <p>- Jenna already checked the feasibility of the checkpoints when she had planned them and linked the learning objectives to them to see whether all learning objectives were covered in the formative assessment plan.</p> <p>- Because different themes within her subject are coherent this makes a check on the consistency between checkpoints less necessary.</p> <p>- By looking for the overarching learning objectives at the start she also already focused on the coherency, and she is planning to repeat this with her colleagues.</p>                                                                                      |