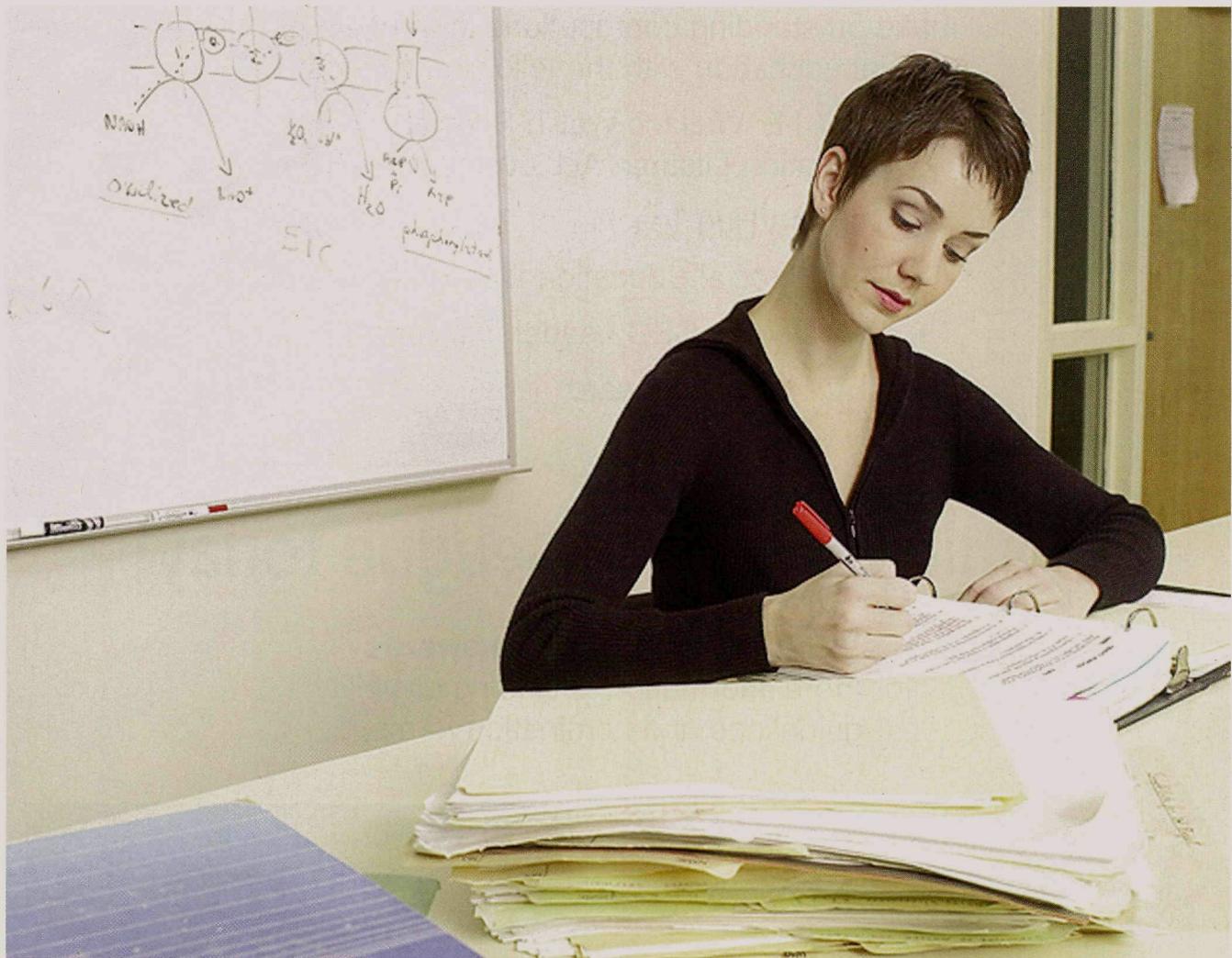


# Formative Assessment Made Easy

*Templates for Collecting Daily  
Data in Inclusive Classrooms*

Kyena E. Cornelius



Katie sat at her desk behind a stack of unit tests and reports. "What happened?" she asked herself. "Why did so many of our students with disabilities do so poorly?" Katie had just graded the written report and end-of-unit tests for her co-taught, eighth grade social studies class. She thought back to the planning of the unit. She and Todd, her general education partner, had made sure their planning intentionally looked at every student's needs and individualized education program (IEP) accommodations. They included all of the students in activities differentiated by readiness level, and all of the students seemed to be engaged. She thought back to each day's lesson. The unit appeared to go smoothly, and Todd and she had kept to their timeline. Katie thought again about the students with disabilities. She knew they were capable, so what did she miss?

Since the reauthorization of the Individuals With Disabilities Education Improvement Act (IDEA, 2006), 57% of students with disabilities have received over 80% of their instruction in the general education classroom (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 2010). As a result, many special educators, such as Katie, team with general educators to provide students with disabilities education in an inclusive setting (Scruggs, Mastropieri, & McDuffie, 2007). In addition, the No Child Left Behind Act of 2001 (NCLB, 2006) calls for higher student academic outcomes. Together, IDEA and NCLB align to provide students with disabilities access to the general education curriculum and accountability of their achievements.

Assessment is usually categorized as either *formative* or *summative*. Districts use summative, high-stakes state assessments to report student achievement. Classroom teachers use end-of-unit summative assessments to record student mastery of content. Special educators use both summative and formative assessment tools to determine student eligibility for special education services and to monitor stu-

dent progress toward IEP goals. Formative assessment is also used as a classroom practice to monitor students' understanding and to adjust instruction to increase learning. In short, formative assessment occurs during instruction to inform teachers of student understanding and to guide additional instructional strategy decisions, whereas summative assessment occurs after instruction with the purpose of evaluating student mastery or demonstrating the *sum of knowledge*.

In addition, formative assessment has been credited with increasing student achievement (Madison-Harris & Muoneke, 2012). The literature on formative assessment suggests that outcomes for students who struggle with learning, students with disabilities, and English language learners increase when formative assessment is implemented as a systematic and continual process (Bangert-Drowns, Kulik, Kulik, & Morgan, 1991; Learning Point Associates, 2009; Madison-Harris & Muoneke, 2012). Formative assessment has the potential to enrich learning and promote deeper understanding of core content (Clark, 2011). Dorn (2010) reported a gap between research and practice of formative assessment, describing the literature base to implement formative assessment as formidable but the evidence of practice as spotty. Formative assessment can be used to organize instruction (Dorn, 2010). Traditionally, pacing guides and content coverage drive instruction. However, formative assessment allows teachers to make instructional decisions based on student needs, thus enabling more personalized instruction for all students.

Wormeli (2007) describes formative assessment as monitoring student progress and adjusting your instructional practice based on information gathered. Just as a good map or global positioning system can effectively guide a journey from start to finish, formative assessment can guide your plan for effective instruction. Tomlinson (1999) also promotes using student work as a planning guide and notes that "assessment is today's means of

understanding how to modify tomorrow's instruction" (p. 10). Teachers should use daily assessment to gauge student understanding of lesson objectives. As teachers plan each following lesson, they should reflect on student understanding and focus on aligning the lesson objectives. This knowledge enables them to make data-driven decisions in instructional planning.

Formative assessment informs a teacher's next steps of instruction. Research suggests that monitoring students, adjusting instruction, and offering feedback can be powerful tools in teaching (Bangert-Drowns et al., 1991; Marzano, 2007). With this objective in mind, teachers should use daily formative assessment to lead students to content mastery and thereby ensure them greater gains (Keeley, 2011; Lingo, Barton-Arwood, & Jolivette, 2011; Wormeli, 2007).

To underscore the importance of this practice, formative assessment and reflective practice are key skills of quality teaching promoted by the Council for Exceptional Children (CEC) and the National Board of Professional Teaching Standards (NBPTS). Several CEC standards address monitoring and planning for classroom practice. Specifically, Professional Standards 6 and 7 advocate grading, promotion, and programming decisions based on well-maintained and objective data (CEC, 2009), and Ethical Principle F states that special educators are committed to "using evidence, instructional data, research, and professional knowledge to inform practice" (CEC, 2010, para. 1). Similarly, the NBPTS third and fourth core propositions call on teachers to monitor student learning and to reflect upon and learn from experiences in their own practice (Hopkins, 2004). Taken together, both CEC and the NBPTS encourage teacher planning to focus on student learning and professional reflection.

Collecting data and monitoring student progress is an essential part of decision making in education (Hojnoski, Gischlar, & Missall, 2009). Classroom data will demonstrate students' progress and help teachers plan

instruction. Admittedly, it can be challenging to gather data and assess students quickly enough to guide daily instruction, especially when teachers do not have easily accessible tools to complete the job. The purpose of this article is to illustrate how formative assessment can enable you to make data-driven decisions that impact student learning in inclusive settings. Accordingly, three easy-to-use templates are offered to gather formative assessment data for quick and confident implementation. The first template, an anecdotal seating chart, is a convenient tool to make quick notes to reference student progress and concerns. The second template, a daily scorecard, is a one-sheet snapshot of all students' progress using curriculum assignments and classroom activities. The third template, an objectives grid, is a running record of students' objectives and the opportunities to document occurrences. Create the tools and put them on a clipboard to use during instruction. When planning with the co-teaching partner, determine the components of the lesson, the student groups, and the teaching roles for the day; also discuss how both teachers can gather information about student learning. When circulating around the class, observe evidence of student progress all around you by utilizing a tool to make a tally mark or quick note for an artifact of evidence. Together, these easy-to-use templates can be used to gather formative assessment data.

### Anecdotal Seating Chart

Recording personal observations of students allows for a more complete picture of engagement and student experiences (Alberto & Troutman, 2012). Aligned with evidence-based practices of anecdotal records assessment, the first template (see Figure 1) offers anecdotal recording in the form of an oversized seating chart. This example was constructed using the shapes feature in Microsoft Word. Using this feature, construct and arrange the boxes to resemble the students' desk arrangement. Enlarge the boxes so that anecdotal notes can be made throughout

the lesson. Jot a quick note about students' interactions with content objectives, use of materials, body language, engagement in discussion, or other pertinent information you do not want to chance forgetting later.

In order for Katie, the teacher described in the opening scenario, to use this tool during classroom instruction, she would place the anecdotal chart on a clipboard and walk around the room monitoring students. Katie might stop next to a student who appears to be watching the discussion but is not actively participating. She knows this student is shy, so Katie engages her with three simple questions. Through the student's answers, Katie assesses her progress toward the objective, places a quick note, and now has one piece of data for progress. Katie moves on and sees a student off task, and her notes indicate this is the second time she has redirected him. She quickly assesses why the student has gone off task twice during one activity and deduces it is the worksheet. Katie adjusts product expectations by asking the student to list the historical events in chronological order,

ond objective, place "RC-2" in the upper left corner of the box. Then, when observing the student, put a check next to the code. This will provide one more piece of data to mark student progress along with the date the objective was addressed. For more precise data collection for IEP progress monitoring, see the Objectives Grid tool on page 20.

Using the anecdotal seating chart can be helpful for co-planning with general education teachers or for use in small group settings. Providing a visual representation of class progress can assist in differentiated lesson planning. Planning instruction that targets students' readiness levels is more natural when you have data on each student in one central location.

### Daily Scorecard

Using a classroom curriculum to create measurements of student growth has been effective in making various decisions in education (Deno, 2003). The second template (see Figure 2) is inspired by research of curriculum-based measurement. Wormeli (2007) poses questions to prompt teacher

## Providing a visual representation of class progress can assist in differentiated lesson planning.

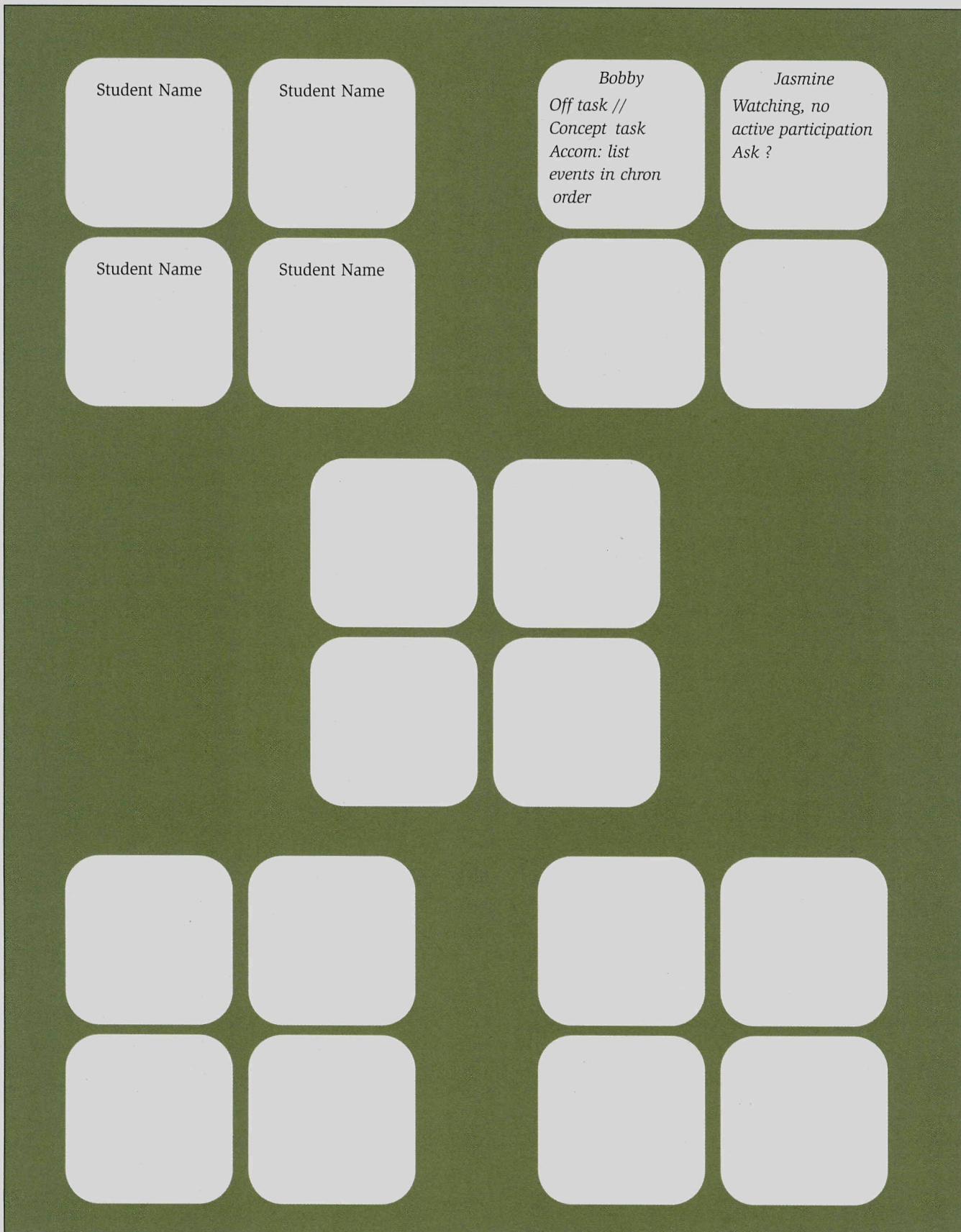
and the student experiences immediate success demonstrating his understanding of the content. After class, Katie and Todd plan instruction for the next day and choose to design a cooperative group review activity for the class opener. Katie looks over the anecdotal seating chart and suggests groupings and discussion questions based on her notes. By implementing one tool, Katie has used data to monitor progress, accommodate student assignments, and plan for the next day.

As a classroom teacher, you can also use this strategy with IEP goals and objectives. As lessons are planned, write students' specific objectives in their boxes. To save space, develop a code from the IEP. For example, if a student has reading comprehension goals and the lesson will target the sec-

reflection of this daily information. The open-ended questioning encourages reflection on student progress toward curriculum objectives while designing future learning experiences. The daily scorecard was created with those reflective questions in mind and creates a one-page visual summary of students' formative data. This helps when reflecting on the curriculum objective and on where students are on the continuum of the objective.

The template consists of six columns for data collection. The following paragraphs will offer some suggestions on how to maximize the template. There are six headings: (1) drill, (2) homework, (3) class practice, (4) physical demeanor, (5) exit ticket, and (6) other. These suggestions are offered as examples; however, the scorecard

**Figure 1. Anecdotal Seating Chart**



*Note.* Use this template to make anecdotal notes during instruction.

## **Figure 2. Daily Scorecard**

*Note.* Use this template for a one-page “snapshot” of student progress. ? = questions. Adapted from *Differentiation: From Planning to Practice, Grades 6–12*, by R. Wormeli, 2007, Portland, MI: Stenhouse Publishers. Copyright 2007 by Stenhouse Publishers. Adapted with permission.

can be personalized to fit the students' needs and specific classroom practices.

Some data can be collected during instruction, more will come from the anecdotal seating chart, and still more will come after looking over student work products. Now picture Katie using this template. When she begins instruction, the *drill*, she asks probing questions to ascertain background knowledge and retention from the last class. Imagine the cooperative group activity she and Todd designed after

the last class. As students engage in the activity, Katie listens to their discussions and has response cards ready for student use. Based on the responses she hears and sees on response cards, she will place a check mark or an x in the drill column. This column can also be used if students write answers down; collect the artifact, and if there is a numerical value place it in the drill column. If there is not an artifact (e.g., personal whiteboards for students are used to display answers),

keep the daily scorecard handy to make tally marks.

The *homework* column can be used in different ways. The teacher can use it to mark a score, to record the commonly missed questions, or to mark a simple yes or no if the student returned homework. Likewise, use this to inform your instructional practice. Information that the teacher deems valuable may change at any given time. For instance, Katie needs more precise information from the home-

work, but is it the concept or the product that is causing difficulty? Here Katie can talk to students, ask a couple of probing questions, and assess their comprehension of the content. Notice on the scorecard template that Katie notes the student understood the concept but had difficulty completing the graphic organizer.

There will be times when student mastery is important, in which case it is more appropriate to note the score. At other times you may need more precise information about questions that were difficult for students in order to conduct an error analysis. This column can be used to meet reflection and planning needs.

The *class practice* column is similar to the homework column because the teacher decides how best to utilize it. During guided practice activities, the teacher can note if students are engaged. Are they meeting the expectations you have set? Are they struggling with a concept during independent practice? Use this column to gather the information needed to further the development of class activities to strengthen student learning. This information may come from an anecdotal seating chart. What notes did you record during instruction? Was the student on task and engaged for every segment of the instruction? This column may also be used when the teacher provides a review before the unit summative assessment. The teacher could mark who is ready and who needs more time. With this information, the teacher can prepare a review activity for those students and arrange a small group review or re-instruction. During guided practice activities, Katie observes one student writing quickly and staring at the clock. The student knows the information and wants to complete the activity, but he needs more time to get his thoughts down. Katie also observes another student struggling with online resources, so she makes these notes under *class practice*.

The column for *physical demeanor* is for the teacher to take time to read body language. The teacher should look closely at a student's face and ask

questions. Are the students confused? Do they look uncomfortable? Or are they happy, smiling, and raising their hands at every opportunity? None of these answers alone will give informative data to help the teacher move forward. However, the answers do provide a starting point for probing. Engage the student who looks confused with a specific question about the content or learning activity. Without acknowledging that the student looks confused, ask him or her to paraphrase or make a connection to a previous class. Do not discount physical demeanor; trust yourself to use it to gauge student learning. Katie looked around the room and saw two students who were engaged, but both had pensive and sullen expressions. She walked over to each of the students and asked explicit questions about the content and the day's objective. Once she was comfortable that they understood the concepts, she asked about their expressions. One student immediately looked up, changed his expression, and said he "got it." Katie determined he just needed the auditory stimulus of hearing himself repeat the concept out loud. Katie made a note to check his IEP for processing strengths. The other student needed a bit more guidance to make a relevant connection to the material. Katie led the student to new understanding by asking questions and tapping into background knowledge. She made a note of "relevance." Katie and Todd routinely presented the relevance of lessons in their opening discussions. This note reminded Katie to explicitly teach personal relevance to this student before discussion began on the next lesson.

The *exit ticket* column is similar to the drill column. If the lesson resulted in an artifact, actual student work, use it. If students use a whiteboard, or if they get up and move to a corner of the room that relates to their understanding level, use the scorecard to mark responses. Again, make this column what is needed in relation to planning needs. Similarly, the *other* column will be information gathered from the anecdotal seating chart. Is there something to follow up with

later? Put a reminder to call home, speak to another teacher, look up a resource, or look up IEP progress. These tools are designed to help, so use each column to mark the information needed to make data-driven decisions to plan future instruction.

After using this template, Katie determined the next class needed more opportunities for student dialogue. By working together, she and Todd designed a series of discussion groups. They wrote guiding questions for the group leaders to use to facilitate discussion as well as provided opportunities for students to write and ask their own questions. Katie also noted from the template that students were having trouble accessing resources to support their answers. She used this information to design instruction that included teacher modeling and guided practice activities for using resource materials.

### Objectives Grid

Capturing data on discrete behaviors and their frequency is often the easiest form of data collection because it only requires a tally mark while observing the behavior's beginning and end (Alberto & Troutman, 2012). Event recording is not limited to social or emotional behaviors; it is effective for academic behaviors as well, such as correct math facts or identifying the main idea in a text. The third template (see Figure 3) allows you to monitor students' IEP goals specific to the day's lesson. The example provided was created using an Excel spreadsheet.

At the beginning of the year, create an Excel workbook for students' IEP goals and objectives. Within the workbook, create a separate worksheet for each student. Type each student's IEP goals and objectives in a separate cell. This will provide you a working database of your students' objectives that you can refer to during lesson planning in order to align with content standards. Organize the workbook to meet your personal needs; the information can be arranged by your daily schedule or content. The workbook can also be organized by the IEP caseload assignment. Depending on the structure of the school, the teacher may teach

**Figure 3. Objectives Grid**

Student	Objective	Date	Opportunity	Occurrence	%
Bobby	Determine the main idea of passage	Today's date	////	///	75%
	Identify at least one supporting detail	Today's date	////	//	50%
Jasmine	Identify cause and effect relationships	Today's date	XXX	///	60%

*Note.* Use this template to monitor progress of IEP objectives.

students who are not on his or her IEP caseload. Thus, the objectives grid becomes evidence of observed progress that can be shared with IEP team members.

When the lesson planning is complete and you know which objectives will be targeted, create a new spreadsheet to use for assessing progress during the lesson. To create your lesson-specific spreadsheet (see Figure 4), begin in cell C1. Leave the first two cells of the worksheet blank and type in the date. To the right, in D1, type the word “opportunity,” and in E1 type the word “occurrence.” Below these headings, in cell A2, type the first student’s name. In B2 and B3, type the targeted IEP objectives in this lesson. Adjust this as necessary to students’ needs. Complete the rest of the worksheet by filling in the students’ names and IEP objectives. Print off the worksheet and keep it available during class instruction.

When instruction begins, the teacher should know the lesson and the IEP objectives he or she is monitoring. Each time an opportunity to respond to this objective is given, place a tally mark in the “opportunity” column. If the student demonstrates the

objective, also place a tally mark in the “occurrence” column. At the end of the class, divide the number of occurrences achieved by the number of opportunities given to compute the percentage. Compare students’ progress from previous lessons and to the criterion stated in the IEP.

Returning to Katie and her students, she notes on her objectives grid the comprehension goal this lesson is targeting. During class she directly probes the students and uses their written work to determine their

### **Conclusion and Implications for Practice**

The templates provided are intended to help the teacher gather daily formative assessment data in his or her classroom. Using the anecdotal seating chart, daily scorecard, and objectives grid can facilitate collaborative planning between the teacher and his or her general education partner. When a teaching team collects and analyzes student data frequently, they can easily adjust instructional pace and student

### **Using the anecdotal seating chart, daily scorecard, and objectives grid can facilitate collaborative planning between the teacher and his or her general education partner.**

progress. With one student, she is looking for progress in determining the main idea and supporting details. For another student, she is monitoring ability to identify cause and effect relationships. Katie knows when these opportunities will be presented in the lesson, so she positions herself close to the students and monitors their responses.

demands to ensure students are making appropriate progress toward content standards. Remember how disheartened Katie was after grading the summative assessment? After Katie introduced Todd to formative assessment, they began to monitor student progress and adjust instruction to meet the needs of students. As Katie and Todd co-plan together, they review the

**Figure 4. Excel Screen Shot: Demonstration of Creating the Objectives Grid**

	A	B	C	D	E	F	G
1			Date	Opportunity	Occurrence		
2	Student A	Objective 1					
3		Objective 2					
4							
5	Student B	Objective 1					
6							
7	Student C	Objective 1					
8		Objective 2					
9							
10							
11							
12							

student data daily. Using formative assessment as a road map, Katie and Todd are navigating their students to higher achievement. You can use formative assessment in the same way to collect evidence of student progress. If a different pace or extra support is needed, use your knowledge of students and their responses to implement strategies to support your decision. The data collected can also drive the research for new evidence-based strategies. Evidence collected in class will facilitate the teacher's role as a professional by enhancing his or her ethical charge to use data to drive instructional decisions.

This article provides easy-to-use templates to lighten a teacher's workload. Using these templates enables teachers to collect daily data on student progress while balancing additional responsibilities of an inclusive classroom. These templates are easy to implement and provide valuable information. By using information to guide instructional decisions and planning, teachers will be more knowledgeable about their students, make better data-driven decisions, and have a written record of student progress.

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