

U.S. Department of Education

Washington, D.C. 20202-5335



APPLICATION FOR GRANTS UNDER THE

GRANTS FOR ENHANCED ASSESSMENT INSTRUMENTS

CFDA # 84.368A

PR/Award # S368A110001

Grants.gov Tracking#: GRANT10883364

Closing Date: JUN 03, 2011

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This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

Application for Federal Assistance SF-424

Version 02

*** 1. Type of Submission:**

- Preapplication
- Application
- Changed/Corrected Application

*** 2. Type of Application:**

- New
- Continuation
- Revision

*** If Revision, select appropriate letter(s):**

*** Other (Specify)**

*** 3. Date Received:**

06/02/2011

4. Applicant Identifier:

5a. Federal Entity Identifier:

*** 5b. Federal Award Identifier:**

State Use Only:

6. Date Received by State:

7. State Application Identifier:

8. APPLICANT INFORMATION:

*** a. Legal Name:**

Wisconsin Department of Public Instruction

*** b. Employer/Taxpayer Identification Number (EIN/TIN):**

39-6006487

*** c. Organizational DUNS:**

809611254

d. Address:

*** Street1:**

125 South Webster Street

Street2:

*** City:**

Madison

County:

*** State:**

WI: Wisconsin

Province:

*** Country:**

USA: UNITED STATES

*** Zip / Postal Code:**

53703

e. Organizational Unit:

Department Name:

Off of Educ Accountability

Division Name:

Div for Stud and School Succes

f. Name and contact information of person to be contacted on matters involving this application:

Prefix:

Mr.

*** First Name:**

Philip

Middle Name:

*** Last Name:**

Olsen

Suffix:

Title:

Assistant Director

Organizational Affiliation:

*** Telephone Number:**

(608) 266-8779

Fax Number:

*** Email:**

philip.olsen@dpi.wi.gov

Application for Federal Assistance SF-424

Version 02

9. Type of Applicant 1: Select Applicant Type:

A: State Government

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

*** 10. Name of Federal Agency:**

U.S. Department of Education

11. Catalog of Federal Domestic Assistance Number:

84.368

CFDA Title:

Grants for Enhanced Assessment Instruments

*** 12. Funding Opportunity Number:**

ED-GRANTS-041911-001

* Title:

Office of Elementary and Secondary Education (OESE): Enhanced Assessment Instruments Grants
Program CFDA Number 84.368A

13. Competition Identification Number:

84-368A2011-1

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

*** 15. Descriptive Title of Applicant's Project:**

Assessment Services Supporting ELs through Technology Systems (ASSETS)

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

Application for Federal Assistance SF-424

Version 02

16. Congressional Districts Of:

* a. Applicant

* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

17. Proposed Project:

* a. Start Date:

* b. End Date:

18. Estimated Funding (\$):

* a. Federal	<input type="text" value="10,486,195.00"/>
* b. Applicant	<input type="text" value="0.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="0.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="10,486,195.00"/>

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

- a. This application was made available to the State under the Executive Order 12372 Process for review on .
- b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation.)**

Yes No

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name:

Middle Name:

* Last Name:

Suffix:

* Title:

* Telephone Number: Fax Number:

* Email:

* Signature of Authorized Representative: * Date Signed:

Application for Federal Assistance SF-424

Version 02

*** Applicant Federal Debt Delinquency Explanation**

The following field should contain an explanation if the Applicant organization is delinquent on any Federal Debt. Maximum number of characters that can be entered is 4,000. Try and avoid extra spaces and carriage returns to maximize the availability of space.



U.S. DEPARTMENT OF EDUCATION
BUDGET INFORMATION
NON-CONSTRUCTION PROGRAMS

OMB Control Number: 1890-0004

Expiration Date: 06/30/2005

Name of Institution/Organization:
Wisconsin Department of Public L...

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION A - BUDGET SUMMARY
U.S. DEPARTMENT OF EDUCATION FUNDS

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 92,132	\$ 92,132	\$ 92,132	\$ 92,132	\$ 0	\$ 368,528
2. Fringe Benefits	\$ 39,165	\$ 39,165	\$ 39,165	\$ 39,165	\$ 0	\$ 156,660
3. Travel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
6. Contractual	\$ 2,209,789	\$ 2,214,598	\$ 3,144,292	\$ 2,223,052	\$ 0	\$ 9,791,731
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 24,134	\$ 24,134	\$ 24,134	\$ 24,134	\$ 0	\$ 96,536
9. Total Direct Costs (lines 1-8)	\$ 2,365,220	\$ 2,370,029	\$ 3,299,723	\$ 2,378,483	\$ 0	\$ 10,413,455
10. Indirect Costs*	\$ 18,185	\$ 18,185	\$ 18,185	\$ 18,185	\$ 0	\$ 72,740
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 2,383,405	\$ 2,388,214	\$ 3,317,908	\$ 2,396,668	\$ 0	\$ 10,486,195

***Indirect Cost Information (To Be Completed by Your Business Office):**

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government? Yes No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: 7/1/2010 To: 6/30/2011 (mm/dd/yyyy)

Approving Federal agency: ED Other (please specify): _____

(3) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

Is included in your approved Indirect Cost Rate Agreement? or, Complies with 34 CFR 76.564(c)(2)?



U.S. DEPARTMENT OF EDUCATION
BUDGET INFORMATION
NON-CONSTRUCTION PROGRAMS

OMB Control Number: 1890-0004

Expiration Date: 06/30/2005

Name of Institution/Organization:
Wisconsin Department of Public L...

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION B - BUDGET SUMMARY
NON-FEDERAL FUNDS

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
2. Fringe Benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
3. Travel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
6. Contractual	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
9. Total Direct Costs (lines 1-8)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
10. Indirect Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

ASSURANCES - NON-CONSTRUCTION PROGRAMS

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.

NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.

<p>* SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL</p> <p>Suzanne Linton</p>	<p>* TITLE</p> <p>Deputy State Superintendent</p>
<p>* APPLICANT ORGANIZATION</p> <p>Wisconsin Department of Public Instruction</p>	<p>* DATE SUBMITTED</p> <p>06/02/2011</p>

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C.1352

Approved by OMB
0348-0046

1. * Type of Federal Action: <input type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. * Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. * Report Type: <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
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4. Name and Address of Reporting Entity:
 Prime SubAwardee

* Name: Wisconsin Department of Public Instruction

* Street 1: 125 S Webster Street * Street 2: _____

* City: Madison * State: WI: Wisconsin * Zip: 53703

Congressional District, if known: _____

6. * Federal Department/Agency: U.S. Department of Education	7. * Federal Program Name/Description: Grants for Enhanced Assessment Instruments
	CFDA Number, if applicable: 84.368

8. Federal Action Number, if known: _____	9. Award Amount, if known: \$ _____
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10. a. Name and Address of Lobbying Registrant:

Prefix _____ * First Name: not applicable Middle Name: _____

* Last Name: not applicable Suffix: _____

* Street 1: _____ * Street 2: _____

* City: _____ * State: _____ * Zip: _____

b. Individual Performing Services (including address if different from No. 10a)

Prefix _____ * First Name: not applicable Middle Name: _____

* Last Name: not applicable Suffix: _____

* Street 1: _____ * Street 2: _____

* City: _____ * State: _____ * Zip: _____

11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* Signature: Suzanne Linton

* Name: Prefix: Dr. * First Name: Michael Middle Name: _____
* Last Name: Thompson Suffix: PhD

Title: Deputy State Superintendent Telephone No.: 608-266-3584 Date: 06/02/2011

NOTICE TO ALL APPLICANTS

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P.L.) 103-382).

To Whom Does This Provision Apply?

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

What Does This Provision Require?

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct

description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?

The following examples may help illustrate how an applicant may comply with Section 427.

- (1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.
- (2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.
- (3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is **1894-0005**. The time required to complete this information collection is estimated to average 1.5 hours per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. **If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to:** U.S. Department of Education, 400 Maryland Avenue, S.W., Washington, D.C. 20202-4537.

Optional - You may attach 1 file to this page.

GEPA.pdf		Delete Attachment	View Attachment
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Section 427 (ED GEPA427)
Assessment Services Supporting ELs through Technology Systems (ASSETS)

The purpose of this proposed project, *Assessment Services Supporting ELs through Technology Systems (ASSETS)*, under the Enhanced Assessment Grant, is to benefit children who encounter one or more of the six types of barriers that impede equitable access or participation: gender, race, national origin, color, disability, or age. Race, national origin, and disability are the three barriers that English language learners (ELs), our target population, most often face. In addition to, or as a subset of the above, ELs face linguistic and cultural barriers that often marginalize them in schools and society.

The project proposed here is designed to assist states, districts, schools, teachers, and students in more equitably and appropriately assessing the academic language development of ELs and in using assessment results to inform educational decision-making on an ongoing basis. By being well informed about the language acquisition process and having meaningful data to guide the selection and implementation of appropriate curriculum and instruction to meet these goals, teachers and students will be in better position to make meaningful decisions to guide student progress in learning English. By learning English, particularly the academic discourse of the content areas, ELs will be better prepared to meet the challenging academic demands of English language classrooms and to be academically successful. Furthermore, the project will result in an assessment system and data reporting structure that disaggregates by learner subgroups, such as ELs whose formal education has been interrupted and ELs by native language.

In addition, through this project we will involve acknowledged experts and school community stakeholders who represent the linguistic, cultural, racial, and other traditionally marginalized groups similar to the ELs for whom this project is intended. These voices will inform the development and implementation process to assure that the assessments and processes we develop are relevant yet free of inappropriate bias. We will also build into our system a reporting procedure or form that is accessible to students and their families in a way that allows for comprehension in an equitable manner without diminishing the content. In some cases, this may mean translations or graphic depictions of critical information.

Finally, because of the proposed project's focus on the linguistic and cultural needs of ELs, we are cognizant of the importance of inclusiveness and will make every effort by advertising in wide array of venues and media to recruit job applicants and staff developers who are often not well represented in similar activities or programs, especially non-native speakers of English, educators with disabilities and/or specialization in the education of children with special needs, and educators who identify with racial, cultural, or linguistic minorities, including Native Americans.

Under the leadership of the Wisconsin Center for Education Research (WCER), all organizations participating in the proposed project will ensure equitable access to, and participation in, the project's activities. As hiring activities take place for the additional FTE's and recruitment and selection processes occur for all activities, the project leaders will solicit participation from all groups including those often underrepresented due to gender, race, national origin, color, disability, or age and will adhere to hiring practices that avoid discrimination on the basis of age, color, creed, disability, marital status, national origin, race, religion, and sex. When hiring new staff, position descriptions and job advertisements will be circulated widely to attract qualified, interested applicants from all groups including those traditionally underrepresented. All participating organizations provide reasonable workplace accommodations and adhere to providing access for physically.

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

*** APPLICANT'S ORGANIZATION**

Wisconsin Department of Public Instruction

*** PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE**

Prefix: Dr. * First Name: Michael Middle Name:

* Last Name: Thompson Suffix:

* Title: Deputy State Superintendent

*** SIGNATURE:** Suzanne Linton

*** DATE:** 06/02/2011

SUPPLEMENTAL INFORMATION
REQUIRED FOR
DEPARTMENT OF EDUCATION GRANTS

1. Project Director:

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
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2. Applicant Experience:

Novice Applicant Yes No Not applicable to this program

3. Human Subjects Research

Are any research activities involving human subjects planned at any time during the proposed project Period?

Yes No

Are ALL the research activities proposed designated to be exempt from the regulations?

Yes Provide Exemption(s) #:

--

No Provide Assurance #, if available:

FWA00005399 (UW Madison)

Please attach an explanation Narrative:

HumanSubjectsNarrative.pdf

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Assessment Services Supporting ELs through Technology Systems (ASSETS)

Nonexempt Human Subjects Research Narrative

The research proposed for the ASSETS project is related to the development and validation of the assessments to be developed under the project. Research activities will be conducted by four entities—Wisconsin Center for Education Research (WCER), The Center for Applied Linguistics (CAL), University of California, Los Angeles (UCLA), and WestEd. A brief description of each study is provided below with respect to the following: The human subjects involvement and characteristics, sources of materials, recruitment and informed consent, potential risks, protection against risk, importance of the knowledge gained, and collaborating sites.

Wisconsin Center for Education Research

WCER will conduct a consequential validity study to determine whether the ASSETS project assessments are being implemented as intended and whether their intended effects are being achieved. Data for this study will come from two sources: 1) an online survey and 2) focus group sessions.

Online surveys: Approximately 250 teachers, their students, and the students' parents will be involved in the online surveys. Participation will be voluntary and teachers will be recruited by soliciting nominations from district-level leadership in the participating EAG states. Inclusion criteria for the teachers will be based on establishing representation of the EL population and representation of the content areas. Researchers will follow WCER IRB human subjects informed consent procedures. The parents of students in participating teachers' classrooms will be asked to give parental consent and students, depending on age, will be asked to give written consent. Participants will be surveyed regarding:

1. Teachers' perceptions of what is being assessed;
2. Teachers' and administrators' preparation for assessment administration;
3. Teachers' and administrators' interpretation and use of results;
4. Types of professional development activities engaged in to support the assessment;
5. Types of curricular material (if any) adopted as a result of participation in the assessment;

6. Parents' perceptions of the assessment and its purposes; and
7. Students' perceptions of the assessment and its purposes.

Focus groups: Approximately 30 representatives from state educational agencies (SEAs) and local educational agencies (LEAs) will be invited to focus groups to discuss the topic listed above. Participation will be voluntary and SEAs and LEAs will be invited with the goal of establishing representation of the WIDA ASSETS consortium states. Researchers will follow WCER IRB human subjects informed consent procedures.

Risks are expected to be minimal given participants will be asked to comment on the effectiveness of educational materials not unlike the kinds of curricular and assessment materials they typically interact with. Benefits include knowing how well the new assessments are implemented and whether the intended effects are achieved.

The Center for Applied Linguistics

CAL's research will involve students in three different capacities during test development: 1) field testing, 2) cognitive labs, and 3) pilots. The most students will be needed for the field test of the summative assessment, which requires about 900 students in each grade level cluster (4500 total). The cognitive labs and pilots of the ASSETS project assessments will require far fewer students, approximately 30 per grade level cluster per round of cognitive labs, and 50 per grade level cluster in the pilot.

Participation will be voluntary. Schools will be recruited by soliciting nominations from state and district-level leadership in the participating states. Then the schools will identify which students are eligible for participation. Inclusion criteria for the students will be based on establishing representation of the spectrum of English language proficiency levels, obtaining a diverse sample that mirrors the greater EL population in the participating states, and obtaining a sample large enough to produce data that can be analyzed both qualitatively (cognitive labs and pilot testing) and quantitatively (field test).

Researchers will follow CAL IRB human subjects informed consent procedures for students and their parent/guardian. The parents of participating students will be asked to give parental consent and students, depending on age, will be asked to give assent or written consent.

During the cognitive labs, a researcher will administer the assessment or a part of the assessment to the student. After the test administration, the test administrator will interview the student about his or her actions during the test administration, following an interview protocol, to better understand the student's thinking about the test items, graphics, animations, as well as the functionality and usability of the test. A second researcher will be in the room, recording the student's responses to interview questions. The interviews with students allow researchers to gain insight into how students understand test items and why they respond the way they do.

During the pilot and field test of the assessments, students will take the assessments in a testing session that resembles the operational assessment procedures. Student responses to items on the pilot test will be used to confirm changes made to the assessments after the cognitive labs. The student responses to test questions on the field test will be collected to analyze the psychometric properties of the items.

Risks will be minimal given that participants will be asked to utilize educational materials not unlike the kinds of curricular and assessment materials they typically interact with. Benefits include empowering students to be critical thinkers and important stakeholders in providing feedback to the test makers, pinpointing specific revisions necessary to improve items prior to field testing, learning how well new assessment items are functioning, and, after the field test results are analyzed, scores on the new assessment will be interpretable on the WIDA English Language Proficiency Scale.

University of California, Los Angeles

Approximately 100 teachers and their students will be involved in UCLA's study. Participation will be voluntary and teachers will be recruited by soliciting nominations from district-level leadership in the participating EAG states. Inclusion criteria for the teachers will be based on establishing representation of the EL student population, representation of the content areas and obtaining the cooperation of approximately 50 elementary and 50 secondary teachers.

Researchers will follow UCLA IRB human subjects informed consent procedures for teachers and students in their classrooms. The parents of students in participating teachers' classrooms will be asked to give parental consent and students, depending on age, will be asked to give assent or written consent.

Teachers will be asked to complete questionnaires about their teaching preparation and experiences and will be administered tasks to measure current knowledge, skills and practices. Classroom observations conducted by researchers will be videoed and coded for integration of the new assessment frameworks and prototype assessments in teachers' practices. Periodic reevaluations will be made to document processes of incorporation and any changes in practice over time. Student outcome measures will include the quality of classroom interactions with teachers and student performance on new WIDA benchmark and summative assessments.

Risks are expected to be minimal given participants will be asked to utilize educational materials not unlike the kinds of curricular and assessment materials they typically interact with. Benefits include knowing how well new assessment frameworks and test items can be utilized in real classrooms to inform the assessment development process.

WestEd

WestEd will conduct cognitive interviews on a purposeful sample of English learner (EL) and non-EL students to validate the accessibility of test items and inform the interpretation of student performance on ASSETS items. These cognitive interviews will include both concurrent and retrospective structured protocols and require students to provide verbal reports on their processing of a selected set of items, in order to examine whether any construct-irrelevant factors are affecting student access to and engagement with the items, and whether the items are measuring the targeted constructs as intended.

The cognitive interviews will involve a total of approximately 150 EL and non-EL students in participating consortium states. Subjects will be purposefully selected such that the range of English language proficiency levels is represented in the sample. Subjects also will be purposefully selected such that they fall across a range of ages/grades—in elementary, middle, and high school. Participation is voluntary and the parents of students will be asked to give parental consent and students, depending on

age, will be asked to give assent or written consent, following WestEd IRB human subjects informed consent procedures.

The cognitive interviews will involve a standardized think-aloud protocol for both concurrent and retrospective data collection. Researchers will be trained on the protocol and take hand-written notes on the cognitive strategies used by students during problem-solving, based on the verbal “think-alouds” of the students. These one-on-one interviews will be conducted in a setting familiar to the students, during school hours, and with a trained researcher. All procedures and protocols described in the proposed study have been designed to comply with the Department of Education’s IRB regulations for safe and appropriate research with minimal burden to human subjects and in keeping with the principles of ethical research outlined in the *Standards for Educational and Psychological Testing* (AERA, APA, & NCME, 1999). Members of the research team who will be involved in conducting the cognitive interviews will complete an online course covering research with human subjects and data security prior to the study’s commencement.

The information gathered for the purposes of this study is not expected to put the subjects at any risk. Rather, the potential benefits to EL students, and the potential contribution of outcomes of this study to improved assessment practices are promising in showing that ASSETS project assessments are providing an accurate measure of student knowledge, skills and abilities, and that the interpretation of results can be used to best benefit students vis-à-vis the instructional decisions, programs, and services they are subsequently provided. The data that are collected will be processed, and will not include any identifiable student-level information. This study is not expected to put the subjects at any risk. Researchers will bear responsibility for ensuring the welfare of students and school staff who volunteer to participate. In this regard, three specific potential areas of concern have been identified. First, school staff (especially teachers) may experience undue burden due to the time required to meet the demands of the project. Second, students may experience undue burden due to the time and cognitive energy required to complete the cognitive interview. Finally, the confidentiality of sensitive student information and performance data

must be maintained. To address these concerns, WestEd will employ specific safeguards to protect the rights and welfare of all students and school and district support staff.

Project Narrative

Abstract Narrative

Attachment 1:

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Assessment Services Supporting ELs through Technology Systems (ASSETS)

Wisconsin Department of Public Instruction

Project Abstract

The Wisconsin Department of Public Instruction, in collaboration with the World-Class Instructional Design and Assessment (WIDA) Consortium, proposes to develop a next-generation comprehensive and balanced assessment system for English learners (ELs). This project, known as *Assessment Services Supporting ELs through Technology Systems* (ASSETS), will leverage the considerable experience of WIDA and its collaborating partners and consortium state educational agencies (SEAs) to create an innovative technology-based assessment system that is (a) anchored in WIDA’s established English language proficiency (ELP) standards that are aligned with the Common Core State Standards; (b) informed by rigorous ongoing research; and (c) supported by comprehensive professional development and outreach, all of which will be developed within the framework of a multistate consortium.

As the management partner of the ASSETS project, WIDA, housed within the Wisconsin Center for Education Research at the University of Wisconsin–Madison, will build on its successful foundation, following well-established approaches that include (a) a *consortium* approach in which representatives from consortium SEAs have an active voice in the design and direction of the project; (b) a *system* approach in which standards, assessments, professional development, and research are well aligned; and (c) a “*can do*” approach that equips educators to tap into what students can do to develop language, access grade-level content, and reach college and career readiness. In collaboration with SEAs and the project’s development and research partners—the Center for Applied Linguistics, UCLA, WestEd, Data Recognition Corporation, and MetriTech, Inc.—and with the advisement of nationally recognized leaders in the field, WIDA will undertake the following activities for ASSETS:

- *Establish a consortium structure* that gives representatives of the respective SEAs a voice in the design, implementation, governance, and policymaking of the ASSETS assessment system;

- *Develop, pilot, field-test, and finalize ELP assessments* (see below) that use technology to allow for more authentic language assessment tasks and compatibility with content-driven assessment systems;
- *Create a technology-based training program* for test scorers;
- *Create professional development and outreach materials*;
- *Conduct evaluation* of the assessments and professional development; and
- *Plan for scale-up and sustainability* of the assessment system beyond the grant period.

The new assessments will include (a) *a summative test* that will cover the language domains of listening, speaking, reading, and writing and the five WIDA ELP standards; (b) *an on-demand diagnostic (screener) test* to be used to determine eligibility for EL services and program placement within those services; (c) *classroom benchmark assessments* that will be organized by language domain and standard at five grade-level clusters and that will incorporate innovative item types and response spaces; and (d) *formative assessment resources* that will include language learning progressions corresponding to college and career readiness standards for incorporation into instructional assessment for ELs.

The ASSETS project represents a critical first step in creating a next-generation EL assessment system. This system will maintain and enhance a large-scale summative assessment in a technology environment, but more critically, it will introduce on-demand, targeted, standards-based benchmark assessments to the classroom that, together with formative assessment processes and resources, can have a powerful and immediate impact on language teaching and learning. WIDA fully expects that with direction from consortium members, the assessments, professional development, and research created and conducted under this grant will continue to improve and expand, offering educators more resources to serve the needs of their students and to guide program development and educational policy.

As of May 27, 2011, the following states have signed memoranda of understanding for this project: Alabama, Delaware, District of Columbia, Idaho, Illinois, Maine, Maryland, Massachusetts, Missouri, Montana, New Hampshire, New Jersey, New Mexico, North Carolina, North Dakota, Oklahoma, Pennsylvania, Rhode Island, South Dakota, Utah, Vermont, Virginia, Wisconsin, and Wyoming.

Project Narrative

Project Narrative

Attachment 1:

Title: Pages: Uploaded File: **1244-ASSETSProposalFINAL.pdf**

Assessment Services Supporting ELs through Technology Systems (ASSETS)

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The Wisconsin Department of Public Instruction, in collaboration with the World-class Instructional Design and Assessment (WIDA) Consortium, proposes to develop a next-generation comprehensive and balanced assessment system for English learners (ELs). This project, known as *Assessment Services Supporting ELs through Technology Systems* (ASSETS), will leverage the considerable experience of WIDA as a consortium of states, as a collaborating partner with leaders in the field of academic English and EL assessment, and as a program known for delivering high-quality products and services focused on enhancing the educational opportunities of ELs in U.S. schools. ASSETS will result in an innovative technology-based assessment system that is (a) anchored in WIDA’s established English language proficiency (ELP) standards that are aligned with the Common Core State Standards; (b) informed by rigorous ongoing research; and (c) supported by comprehensive professional development and outreach, all of which will be developed within the collaborative framework of a multistate consortium.

The WIDA Consortium, housed within the Wisconsin Center for Education Research at the University of Wisconsin–Madison, was originally established with funding from a U.S. Department of Education Enhanced Assessment Grant and currently includes 26 states and the District of Columbia.¹ Since 2003, WIDA has created and adopted comprehensive ELP standards (2004, 2007, in press) that represent the second language acquisition process and the language of the content areas of language arts, mathematics, science, and social studies. Based on these standards, WIDA has developed:

- A K–12 annual summative ELP test, Assessing Comprehension and Communication in English State-to-State for English Language Learners (ACCESS for ELLs®);
- An initial screener, the WIDA ACCESS Placement Test (W-APT™); and

¹ WIDA Consortium membership as of May 2011: Alabama, Alaska, Delaware, the District of Columbia, Georgia, Hawaii, Illinois, Kentucky, Maine, Maryland, Minnesota, Mississippi, Missouri, Montana, New Hampshire, New Jersey, New Mexico, North Carolina, North Dakota, Oklahoma, Pennsylvania, Rhode Island, South Dakota, Vermont, Virginia, Wisconsin, and Wyoming.

- An on-demand, “off-the-shelf” test of ELP known as WIDA MODEL™ that can be used for placement or for interim assessment.

In addition to its standards and assessments, WIDA pursues a research agenda on behalf of member states. WIDA research explores not only the validity of the assessments, but also areas of interest such as ELP growth rates, correlations between ELP tests and academic tests, and classroom implementation of the ELP standards. Concurrently, WIDA provides extensive professional development opportunities and maintains a comprehensive website (www.wida.us).

The ASSETS project builds on WIDA’s successful three-part approach, as illustrated in Table 1.

Table 1

Foundations of WIDA’s Successful Approach

Elements of approach	WIDA Consortium	ASSETS
Consortium	Consortium members voluntarily join together to address EL needs while satisfying state/federal requirements. All members have a voice and benefit from collaboration.	The ASSETS next-generation ELP assessment system will be designed with collaborative input from consortium members to meet their needs.
Integrated systems	WIDA’s ELP test—ACCESS for ELLs®—is integrated within an aligned assessment system comprising comprehensive ELP standards, multiple assessments, professional development, and EL-related research.	ASSETS will integrate technology-based assessments and professional development in an innovative and comprehensive system that corresponds with state academic standards, including the Common Core and is compatible with other academic assessment systems.

Elements of approach	WIDA Consortium	ASSETS
“Can do” philosophy	Underlying WIDA’s products and services is the belief that developing language proficiency is about tapping children’s capacity—not overcoming their limits.	Underlying ASSETS is the belief that valid, reliable assessment equips educators to help students develop language, access grade-level content, and reach college and career readiness.

On March 30, 2011, representatives from 22 states—19 current WIDA member states and 3 additional states—met to plan for the next-generation standards and assessment system. This proposed ASSETS project represents the consensus reached at that meeting on the direction to be taken moving forward. In pursuing these directives, WIDA² will take the following steps:

- *Establish consortium structure.* WIDA will give representatives of the respective state educational agencies (SEAs) a voice in the design, implementation, governance, policymaking, and other relevant issues pertaining to the ASSETS assessment system. SEA decision making will include, but not be limited to, establishing a common definition of *English learner*, approving the assessment design, determining accommodations policies and procedures, and establishing data-reporting criteria.
- *Develop ELP assessments.* WIDA will develop, pilot, field-test, and finalize ELP assessments that use technology to allow for (a) more authentic language assessment tasks, including performance-based tasks for all language domains (listening, speaking, reading, and writing); (b) timelier—in some case,

² The original WIDA Consortium and the collaborative partnership created for the purpose of realizing the goals of the ASSETS project (WIDA-ASSETS) are different but overlapping entities. For simplicity, we generally use *WIDA* in this proposal to refer to both entities. Members of WIDA-ASSETS include the Wisconsin Department of Public Instruction, the consortium member SEAs, the WIDA project team at the Center for Applied Linguistics, and the WIDA project at the Wisconsin Center for Education Research (*WIDA Central*). In the future, the ASSETS project consortium members may elect to create a new name.

instantaneous—score reporting; (c) reduced burden on test administrators; and (d) compatibility with content-driven assessment systems, including those of the Partnership for the Assessment of Readiness for College and Careers and the SMARTER Balanced Assessment Consortium, as well as with individual state achievement measures. The new assessments to be developed include:

- *A computer-based summative test.* The summative test—to be administered annually in Grades K–12 for accountability and program purposes—will cover (a) the language domains of listening, speaking, reading, and writing and (b) the five WIDA ELP standards, encompassing social and instructional language and the language of language arts, mathematics, science, and social studies. This test will include (a) selected-response options for listening and reading that are machine-scored and (b) constructed-response options for speaking and writing that are digitally recorded or handwritten on paper and centrally scored by human raters.
- *A computer-based on-demand diagnostic (screener) test.* The screener test will be used to determine eligibility for EL services and program placement within those services. The test format will be derived from the summative test, with all scoring done locally.
- *Computer-based classroom benchmark assessments.* A series of benchmark assessments will be organized by language domain and standard at five grade-level clusters: 2, 5, 7–8, 9–10, and 11–12. In the speaking and writing domains, item and task types will be similar to those for the summative and screener tests. The listening and reading domains, however, will incorporate innovative item types, including performance tasks, and innovative response spaces that allow for partial- and full-credit scoring. These benchmarks will provide immediate feedback.
- *Formative assessment.* WIDA will develop a foundation for the formative assessment process to be used by classroom teachers. This process will include the design of language learning progressions corresponding to college and career readiness standards for *incorporation* into instructional assessment for ELs.
- *Create a training program for scorers.* WIDA will create, pilot, and field-test an adaptation of the Multimedia Rater Training Program (MRTP). Developed by our test development partner, the Center

for Applied Linguistics, the MRTP is an interactive software program designed to teach professionals to rate oral language proficiency. The adapted MRTP will provide intensive, on-demand training and practice in scoring speaking and writing. It will be used by educators for scoring the screener and benchmark assessments.

- *Create professional development and outreach materials.* WIDA will develop, pilot, field-test, and finalize materials and methods for (a) professional development on implementation of the assessment system, including appropriate and effective use of assessment results, and (b) outreach to stakeholders, including families, policymakers and researchers.
- *Conduct evaluation.* WIDA will evaluate the assessments and professional development using industry-approved practices and standards in psychometrics, quality control procedures, and qualitative and quantitative research methodologies.
- *Plan for scale-up and sustainability.* WIDA will establish a plan for scaling up the new assessment system and sustaining it beyond the grant period. The plan will cover (a) procuring a post-grant technology-based platform provider and scoring partner through a request for proposals process in accordance with state procurement rules; (b) devising a consortium governance structure that is sustainable for the long term; and (c) working with states to ensure access to the standards, assessments, professional development, and research results.

The ASSETS project represents a critical first step in creating the next generation EL assessment system, which includes standards that correspond to college and career readiness standards, a complete suite of research-based assessments, professional development that is centered on the needs of ELs by focusing on building educators' knowledge and skills, data management systems that allow for meaningful analysis, and research that is timely, actionable and supports ELs. This system maintains and enhances large-scale summative assessment in a technology environment, but more critically, it introduces on-demand, targeted, standards-based benchmark assessments to the classroom that, together with formative assessment processes and resources, can have a powerful and immediate impact on language teaching and learning. WIDA fully expects that with direction from consortium members, the

assessments, professional development and research created and conducted under this grant will continue to improve and expand, offering educators more resources to serve the needs of their students and to guide program development and educational policy. As an example of the anticipated continual improvement to the system, Table 2 illustrates WIDA’s vision of how the assessments will evolve from WIDA’s current offerings, to what will be developed by the end of the grant, and what is likely to be further developed after the grant period as the system becomes operational.

Table 2

Assessment System: Current, End-of-Grant, and Long Term Post-Grant

Features	Summative assessment			On-demand screener			Benchmark assessments		
	C	G	PG	C	G	PG	C	G ^b	PG ^c
Paper-based	✓	✓	✓ ^a	✓	✓	✓ ^a	✓		
Computer-based		✓	✓		✓	✓		✓	✓
Semi-adaptive					✓				
Adaptive			✓			✓			
Innovative item types			✓			✓		✓	✓

Note. C = current system. G = system at end of grant period. PG = post-grant system.

^aPaper-based version available as an accommodation. ^bIn selected domains/standards for Grades 2, 5, 7–12. ^cIn all domains/standards for all grades.

Absolute Priorities

The ASSETS project will address all five absolute priorities, as discussed throughout this proposal. Here, we summarize briefly:

- *Absolute Priority 1—Collaborations.* ASSETS represents a collaboration among the current WIDA Consortium member states, including Wisconsin; several additional (non-WIDA) states; the Wisconsin Center for Education Research (WCER); the Center for Applied Linguistics (CAL); Data Recognition Corporation (DRC); MetriTech, Inc.; the National Center for Research on Evaluation,

Standards, and Student Testing (CRESST) at UCLA; WestEd; and individual expert consultants.

Representative educators from local educational agencies (LEAs) and schools will also participate in aspects of this project.

- *Absolute Priority 2—Use of multiple measures.* The ASSETS project will develop multiple measures of student progress in learning English through several types of assessments and resources mentioned above and detailed below.
- *Absolute Priority 3—Charting student progress.* The assessments will be developed so that the resulting data can be used to chart student progress over time (a) at local classroom and school levels to guide curriculum and instruction, (b) at SEA and LEA levels for accountability purposes, and (c) at the consortium level to inform the field and policymakers.
- *Absolute Priority 4—Comprehensive academic assessment instruments.* ASSETS will result in a system of comprehensive academic language assessment instruments that leverage technology to assess authentic language development more accurately than paper-based tests. The assessment system will include a screener, an annual summative test, periodic benchmark tests and resources for formative assessment.
- *Absolute Priority 5—English language proficiency assessment system.* The ASSETS ELP assessment system will be anchored in WIDA’s existing ELP standards (aligned with the Common Core State Standards) and include multiple types of new high-quality assessments designed to (a) monitor student progress, inform instruction, and provide accountability measures; (b) yield actionable data; (c) be compatible with states’ assessment systems; and in conjunction with other WIDA resources, (d) provide for the inclusion of all ELs, including students with severe cognitive disabilities.

Competitive Preference Priority

Since 2003, WIDA has grown as a consortium with a governance structure that allows for significant SEA input and an open communications policy that has served it well. The governance structure of the new WIDA-ASSETS Consortium will be similar. This new consortium currently includes twenty-four

states (21 current WIDA Consortium member states and 3 non-WIDA states) from whom WIDA has received signed Memoranda of Understanding.

The new consortium will have two types of members: *advisory members* (SEAs involved with more than one consortium under this grant competition) and *governing members* (SEAs committed only to WIDA-ASSETS). Only governing members will be able to participate in final policy decisions. The goal for final decisions will be consensus, but a simple majority vote will be enough to set policy in most instances. Operational decisions will be made by WIDA Central, the project management partner. WDPI and WCER will manage grant funds.

A subcommittee of the governing states will form a Steering Committee, to be chaired by the representative from the Wisconsin Department of Public Instruction. The role of the Steering Committee will be to provide researchers and test developers with direction and advice to ensure that products and services meet the needs of the states and the requirements of the law. The Steering Committee will also advise WIDA Central on operational decisions. Additional subcommittees may be formed as needed to guide the work of the consortium.

Any state will be able to join the consortium by agreeing to be bound by all statements and assurances in the grant application and executing a memorandum of understanding making the required assurances for adopting and using project products. Advisory members will be able to upgrade their membership status by changing their involvement with other consortia. Member states will be permitted to leave the consortium for any reason during the project period, upon U.S. Department of Education approval.

The timeline for key decisions and project implementation will be established by the project plan. The Steering Committee will research and prepare, using working groups as necessary, all policy decisions and required definitions for a full vote by the governing states.

1. THEORY OF ACTION

Modern conceptualizations of test validity center on the *use* made of assessments results (e.g., American Educational Research Association [AERA], American Psychological Association [APA], & National Council on Measurement in Education [NCME], 1999, p. 9). In Section 4, we present our

approaches to validation based on Bachman's (2005) assessment use argument. Here, we simply state (a) the intended uses to be made of each of the four components of our proposed assessment system; (b) the way in which this assessment system can be incorporated into coherent educational systems; and (c) the way in which these educational systems will improve academic achievement for ELs.

The first element in the assessment system is the *screeener*. Scores from the screener will primarily be used to identify students as ELs. The screener will also provide a preliminary determination of proficiency as defined by the WIDA ELP standards (Section 2.2) for use in classroom or course placement, initial grouping of students, and progress monitoring.

Students found eligible for services will take the *summative assessment* annually. This assessment will provide a fair, valid, and reliable measure of student performance in the four domains of reading, writing, speaking, and listening, together yielding a comprehensive ELP score. Scores from this assessment are intended for use at state, LEA, school, classroom, and student levels to chart student progress over time, inform decisions about when students should exit English language support programs, and help determine school, LEA, and state effectiveness for accountability purposes. At the local level, scores may serve as one component of principal and teacher evaluations and as an indicator of needed professional development and support.

The *benchmark assessments* will enable schools to chart student progress in finer increments and with more precision than the summative test. Scores from the benchmark assessments are intended for use at LEA, school, classroom, and student levels to monitor language progress on an ongoing basis, to differentiate language instruction or regroup students during the school year, and to inform teachers' collaborative lesson planning and design. At program and district levels, the results will be able to be used to determine ELP benchmarks, contribute to program and district accountability, and inform evaluations of education programs.

In creating these instruments, WIDA will identify key assessable academic language, drawn from the linguistic (e.g., vocabulary, text complexity, forms and conventions) and sociocultural elements in the WIDA ELP standards. Based on these constructs, WIDA, in collaboration with researchers at UCLA, will

then develop language learning progressions, the foundation of the *formative assessment* resources. Ongoing formative assessment will yield meaningful feedback to students and actionable data to teachers so that they can collaborate, adjust their curriculum and instruction, and communicate with families, board members, and other stakeholders in the community.

The ASSETS assessment system will give our consortium states the opportunity to incorporate high-quality assessments and assessment results into their educational systems to improve teaching, learning, and language instruction programs. Through its link to college- and career-ready standards, the assessment system will complement the overall educational system and serve as a pathway for EL access and participation. Each assessment will be designed for use (a) *vertically* with other components of the assessment system to provide a better picture of student language performance and (b) *horizontally* with other components of the overall educational system to contextualize academic achievement data and more accurately profile annual, interim, or ongoing student performance. The fundamental goal of the system, however, is to provide actionable data that leads to improved student outcomes in the belief that when educators know what students can do, they are better equipped to guide those students in building their language base to access grade-level content to reach college and career readiness.

The assessment system will also provide a basis for consortium-led research that will provide data to improve EL achievement nationally. The screener could be used for validity studies of home language surveys for EL identification and determination of eligibility for language support. The summative assessment will provide data for predictive validity studies of performance on achievement measures, determination of the time required for subgroups of ELs to gain full English proficiency, and comparability studies of computer- and paper-based forms. The benchmark data will be useful in predictive validity studies of the summative assessment, reliability studies of performance tasks, research on the use of language data for decision making, and evaluation of language education programs. The formative assessment process will yield data for studies of classroom use of ELP standards, implementation of academic language progressions, and teachers' perceptions of student performance. The combined data will also contribute to evolving definitions of *English learner* and to our

understanding of academic language and its impact on academic achievement. Finally, research using data generated by the proposed assessment system will shed light on the academic achievement of ELs and the field of second language acquisition more generally.

2. ASSESSMENT DESIGN

2.1 Number and Types of Assessments

Building on the solid foundation of its existing annual summative assessment—ACCESS for ELLs®—and the accompanying on-demand screener, the *W-APT™*, WIDA will develop three types of next-generation assessments as part of the ASSETS assessment system:

1. A computer-based annual *summative assessment*;
2. An accompanying computer-based on-demand *screener*; and
3. Computer-based classroom *benchmark assessments*.

In addition, WIDA will undertake much-needed research to begin developing academic English language learning progressions as the foundation for teacher-friendly *formative assessment* resources. Together, the annual summative assessment, screener, benchmarks, and formative assessment resources will constitute a comprehensive set of assessment tools.

To ensure that all consortium members can make a smooth transition to computer-based testing, paper versions of the annual summative assessment and on-demand screener will also be available during the grant period, incorporating appropriate changes to make them as parallel as possible to the next-generation assessments.

By the end of the grant period, WIDA will have parallel computer- and paper-based annual summative and on-demand screener tests in five grade-level clusters (kindergarten, 1–2, 3–5, 6–8, and 9–12), across all five WIDA standards and proficiency levels and in all four language domains (see Section 2.2). Multiple innovative computer-based benchmark tests will be available for Grades 2, 5, 7–8, 9–10, and 11–12 organized by standard, language domain, and proficiency level. To further guide educators, language learning progressions will be drafted to inform the formative assessment resources.

2.2 Assessment of Relevant Standards

The WIDA Consortium preK–12 ELP standards, currently being implemented in 28 states and the District of Columbia, are at the foundation of the proposed project. Grounded in scientifically based research (August & Shanahan, 2006; Francis, Lesaux, Kieffer, & Rivera, 2006; Genesee, Lindholm-Leary, Saunders, & Christian, 2006), linguistic theory (Bailey, 2007; Schleppegrell, 2004; Scarcella, 2003), and best educational practices for ELs (Chamot, 2009; Echevarria, Vogt, & Short, 2008; Freeman, Freeman, & Mehuri, 2002), WIDA’s comprehensive ELP standards publications (2004, 2007, in press) illustrate pathways for ELs to become fully proficient in both social and academic English. The WIDA ELP standards, internationally referenced (Gottlieb & Jones, 2008), encompass the language needed for success in school and beyond. They are organized as follows:

- *Five grade-level clusters:* preK–K, 1–2, 3–5, 6–8, and 9–12³
- *Five language standards:* social and instructional language; the language of language arts; the language of mathematics; the language of science; and the language of social studies
- *Four language domains:* listening, speaking, reading, and writing
- *Five ELP levels:* 1–Entering, 2–Beginning,⁴ 3–Developing, 4–Expanding, and 5–Bridging

The WIDA ELP standards are represented by strands of *model performance indicators* (MPIs) that form matrices for each grade-level cluster. The consortium’s existing annual summative assessment, ACCESS for ELLs[®], directly measures ELs’ ELP in relation to the WIDA standards. All items on the test are designed to allow ELs to demonstrate meeting the standards’ MPIs at specified performance levels.

The WIDA ELP standards have been shown to correspond to the academic content standards of all consortium member states, as well as to the Common Core State Standards. An independent alignment

³ The fall 2011 edition of the WIDA ELP standards will represent the standards by grade level (K, 1, 2, 3, 4, 5, 6, 7, 8, 9–10, 11–12) to mirror the structure of the Common Core State Standards.

⁴ The *beginning* level will be changed to *emerging* in the fall 2011 edition of the WIDA ELP standards.

study by the E-TEAM evaluation group (2011) reported “adequate linking across all grade clusters” (p. 1) between the WIDA ELP standards’ MPIs and the Common Core State Standards in English language arts (reading, writing, speaking, and listening) and mathematics. Additionally, the new edition of the WIDA ELP standards, to be published fall 2011, uses individual grade-level examples to explicitly connect the WIDA ELP standards and the Common Core State Standards, topically and linguistically, for educators. Based on the results of the E-TEAM study as well as WIDA’s ongoing individual state alignment studies offered to new member states, the WIDA ELP standards can be said to reliably represent the language of the content taught in any state that might adopt the consortium’s assessments.

In developing the next generation of ELP assessments, the goal is to continue to create items and performance tasks that allow ELs to demonstrate achievement of the WIDA ELP standards’ MPIs as students move toward readying themselves for college and careers.

2.3 Required Student Performance Data

The ASSETS next-generation assessment tools will produce all of the required student performance data described in Absolute Priority 5—and more besides. As with WIDA’s current ACCESS for ELLs[®] test, the next-generation *annual summative assessment* will provide fair, valid, and reliable measures of student ELP in the domains of reading, writing, speaking, and listening, which will be combined to form a comprehensive ELP score. As with ACCESS, these scores will be provided as scale scores on a vertical K–12 scale and as interpretive proficiency-level scores that, for each grade level, show the relationship between scores and proficiency levels as defined by the WIDA standards. Educators will be able to use these scores to chart student progress in learning English over time, to inform decisions about whether an individual student should exit from English language instruction educational programs, and to help determine school, LEA, and state effectiveness for accountability purposes. At a more local level, scores may be used, as appropriate, as one of multiple measures to inform principal and teacher evaluations, as an indicator of needed principal and teacher professional development and support, and, together with information from the benchmark assessments and good formative assessment practices, as a tool for identifying strategies to improve teaching, learning, and language instruction education programs.

Student performance on the *on-demand screener* will also be interpreted in terms of the proficiency levels defined by the WIDA ELP standards and will primarily be used for the identification of students as ELs. Performance on the screener will (a) represent a fair, valid, and reliable measure of whether a student's current level of English proficiency is above or below that for identification as an EL, and (b) if below, enable identification of a preliminary level of proficiency as defined by the WIDA ELP standards.

Student performance on the individual *classroom benchmark assessments* will be based on complex demonstrations of comprehension and production of academic English language. Each short benchmark assessment will be designed to assess attainment of MPIs within a language domain (listening, speaking, reading, or writing), in one or two of the five WIDA ELP standards (social and instructional language, the language of language arts, the language of mathematics, the language of science, and the language of social studies), and at a particular proficiency level defined by the WIDA performance levels (1, 2, 3, 4, or 5). The benchmark assessments will provide teachers and local school districts with evidence of student attainment of the standards or, alternatively, feedback on additional needs. They will be useful in checking a student's current proficiency level or marking progress toward the next higher proficiency level. The benchmark assessments will thus give educators multiple measures of student ELP development from multiple sources. They will also constitute comprehensive academic assessment instruments that are performance- and technology-based.

Data on student progress in attaining English proficiency will be disaggregated by EL subgroups such as (a) ELs by years in a language instruction educational program, (b) ELs whose formal education has been interrupted, (c) students who were formerly ELs by years out of the language instruction educational program, (d) ELs by level of English proficiency, such as those who initially scored proficient on the ELP assessment, (e) ELs by disability status, and (f) ELs by native language. The types of data to be produced are described in Section 2.5.

2.4 Availability of Student Data

The introduction of computer-based testing to the large-scale, secure *annual summative assessment* testing program provides several opportunities to improve the scoring turnaround time, from

approximately 8 weeks after the close of a state’s testing window with the current ACCESS for ELLs[®] to as little as 4 weeks. Specifically, computer-based testing will make possible the immediate delivery of test responses to the central office where they will be scored, eliminating delay caused by scanning student responses or digitizing student writing or speaking performances and enabling continuous distributed scoring. Moreover, embedding field-test items in a technology-based assessment is easier than the current field-testing practices, given the 44 different paper forms of ACCESS, and thus pre-equating of refreshed items will also improve turnaround time. Nevertheless, we acknowledge the need for strict quality control of all summative data, including the opportunity for states to review the data before it is publically released, and thus a window of 2–4 weeks is imagined.

For the *on-demand screener*, although the listening and reading portions will be computer-scored, the writing and speaking (performance-based) portions will be locally scored by educators. Scores will be available as soon as local scoring is complete. To improve scorer performance, we are proposing to develop computer-based training programs adapted from the Multimedia Rater Training Program developed by our test development partner, the Center for Applied Linguistics (CAL). We are also proposing to use computer-assisted scoring based on CAL’s Computerized Oral Proficiency Instrument. More information on these proposed computer-based tools is provided in Section 2.10.

The *classroom benchmark assessments* for listening and reading will provide immediate scores and feedback useful to students and teachers. As with the screener, performance on writing and speaking tasks will be scored by teachers trained with a computer-based training program and assisted with a computer-based scoring program. These scores will be immediately useful to inform and guide instruction. In addition, performance on the speaking and writing benchmark assessments may be digitally stored and thus enable a portfolio approach to evidencing progress in developing academic language proficiency in those two language domains.

2.5 Types of Student Data

For each student, the data produced by the proposed assessments will meet the requirements of Absolute Priority 5(c). The main data from the annual summative assessment will be *raw scores* by

domain; *scale scores* on a K–12 vertically aligned (within-domain) scale; and a grade level–specific *proficiency-level score* that interprets a student’s performance in terms of the proficiency levels defined in the WIDA standards. Vertical scaling makes it possible to measure progress in terms of scale scores as students move across both *grade-level clusters* and *tiers within clusters*. Proficiency-level scores will be presented as whole numbers followed by a decimal (e.g., 2.3) as they are currently for ACCESS for ELLs®. The whole number indicates the student’s language proficiency *level* based on the WIDA ELP standards; the decimal indicates the *proportion* within the proficiency-level range that the student’s scale score represents, rounded to the nearest 10th.

Following ACCESS for ELLs®, composite scores on the new summative assessment will be derived from weighted scale scores from the four language domains. The *oral language composite* will be equally weighted from the listening and speaking domains. The *literacy composite* will be equally weighted from the reading and writing domains. Following policy guidelines from the current WIDA member states, the *overall composite* will be weighted to reflect a greater emphasis on reading and writing (i.e., listening 15%, speaking 15%, reading 35%, writing 35%) unless the new consortium for the ASSETS project agrees upon different criteria for establishing an overall composite score.

Primary data from the on-demand screener will be an *overall proficiency-level score* that can be used for EL identification and placement in services. Since the screener will be much shorter than the annual summative assessment, the overall proficiency level will be the most psychometrically reliable result. The screener will provide initial proficiency-level scores for each domain that may prove helpful in determining students’ English language support needs and in making tier-level assignments on the annual summative assessment.

Results of the short classroom benchmark assessments will be interpreted primarily in terms of the evidence they provide of attainment of MPIs for the grade level, language domain, and standard(s) targeted by the particular benchmark assessment administered.

Table 3 summarizes the types of scores the new assessments will provide.

Table 3

ASSETS Assessments: Types of Scores to Be Produced

	Type of score			
	Raw	Vertical scale	Interpretive ELP	Targeted feedback
Domains (L, S, R, W)	A, S, B	A	A, B	B
Oral composite		A	A, S, B	
Literacy composite		A	A, S, B	
Overall composite		A	A, S, B	

Note. L = listening. S = speaking. R = reading. W = writing. A = annual summative assessment.

S = on-demand screener. B = classroom benchmark assessments. Oral composite = 50% L, 50% S.

Literacy composite = 50% R, 50% W. Overall composite = 15% L, 15% S, 35% R, 35% W.

The ASSETS Steering Committee and Technical Advisory Committee (see Section 7.5), with consultation from WestEd’s Robert Linquanti (Section 7.5), will advise the project on what types of data to collect in addition to test scores, as well as how best to disaggregate groups within the EL population (see Section 2.3) and how these data might be used ultimately to inform policy and improve English language teaching and learning.

2.6 Uses of Student Data

WIDA is committed to making data available—to the degree permissible under the Family Educational Rights and Privacy Act of 1974 (FERPA; 20 U.S.C. § 1232g)—to relevant stakeholders to guide decisions about individual student achievement, program effectiveness, and professional development needs, as well as to inform teaching and learning for ELs generally. To assist in this endeavor, WIDA supports a SQL server–based comprehensive data warehouse of all available assessment and assessment-related information collected from WIDA states. WIDA’s data warehouse includes not only ACCESS for ELLs® assessment data, but also data from selected research data collections of the National Center for Education Statistics: the Common Core of Data (CCD), the Schools and Staffing

Survey (SASS), and the National Assessment of Educational Progress (NAEP). These data sets are merged using the CCD identifier for schools, districts, and states. The data warehouse annually combines assessment and national data collection data and creates a longitudinal data system with unique student identifiers. Currently, the data warehouse houses 25 states' data across 6 years with more than 1.5 million student records tracked longitudinally. WIDA's data warehouse is designed to facilitate integration of additional measures, teacher and administrator information, or other relevant educational data.

To support member states, districts, and schools, WIDA has completed piloting a comprehensive online data dashboard of relevant WIDA state assessment data drawn from the data warehouse. WIDA's data dashboard has static assessment information related to ACCESS for ELLs[®] as well as state and WIDA-wide demographic information (e.g., number and percentage of students by cluster and native language). The dashboard supports two forms of longitudinal data for all domains and clusters from states: *mean growth rates* and *percentile growth charts*. Additionally, it provides state and national NAEP data in the areas of reading, writing, science, and mathematics. The data dashboard is designed to support program improvement, build administrators' and teachers' capacity to access and use EL-related information, and ultimately improve student learning.

The data dashboard is scheduled to go live in June 2011. WIDA is in the process of developing a comprehensive professional development program on how to use the data dashboard and its information to support program improvement and student achievement. Professional development offerings on the dashboard will be available to member states in the fall of 2011. Although outside the scope of this grant, the data dashboard and its accompanying professional development will be expanded to include new types and additional data created through the ASSETS project and beyond.

2.7 Frequency and Timing of Assessment Administration

As seen in Table 4, the large-scale annual *summative assessment* will be administered to students once a year during a state's testing window. This schedule will allow states to collect suitable data in a standardized fashion for federal accountability purposes. The *on-demand screener* will typically be administered only once to a student who is entering a local academic program, for the purposes of

identification as an EL and initial placement into a proficiency level; it is not intended for multiple administrations to the same student. *Classroom benchmark assessments* will be used by educators on an on-demand basis. As part of this grant, professional development materials will be created to help educators make the best use of the benchmark assessments as they guide students toward achieving targeted goals. The proposed *formative assessment resources* will be available on an ongoing basis, giving educators insight into how to assess students continually during the education process.

Table 4

Frequency and Timing of Assessment Administration

Timing determined	Frequency		
	1/yr	Once	On demand
By state	A		
Upon entrance to local program		S	
By district, school, educator			B

Note. A = annual summative assessment. S = on-demand screener. B = benchmark assessments.

2.8 Number and Types of Items

Because the proposed project for new assessments will build on WIDA’s experience with ACCESS for ELLs[®], we provide some background on that assessment here. Currently, ACCESS is available only in paper format. Drawn from the MPIs, ACCESS incorporates all five standards and ELP levels in sections that correspond to the four domains. The target administration times for each section of the test for Grades 1–12 are: Listening: 20–25 minutes; Reading: 35–40 minutes; Writing: Up to 1 hour; and Speaking: Up to 15 minutes. The kindergarten test is individually administered and takes 40 minutes on average.

The goal of the ACCESS test is to allow students to demonstrate their level of proficiency by demonstrating mastery of the MPIs. However, there are far too many MPIs to present to any single test taker within a reasonable testing session. To reduce the test burden, ACCESS presents test items in three

tiers (A, B, and C) for each grade level cluster. Tier A targets Proficiency Levels 1–3; Tier B, Levels 2–4; and Tier C, Levels 3–5. The tiers overlap to ensure that each is measuring to a common proficiency scale.

The ACCESS test battery is a collection of assessment instruments administered to all ELs across all grades and all proficiencies. Each test form consists of a set of *thematic folders*, or parts, generally containing three items each. This arrangement is intended to give students a context for items, minimizing the cognitive leaps they must make in transitioning from items in one area (e.g., language of math) to items in the next. Because this format has been successful in operationalizing the MPIs of the standards, it will serve as a starting point for work on the ASSETS next-generation assessments. Below, we discuss each of the new assessments in turn.

Annual Summative Assessment

During the grant period, research, development, and operationalization of innovative computer-based item types will focus on the classroom benchmark assessments (discussed below). Once those item specifications have proven stable, the innovative item types will be migrated up to the annual summative assessment. In the interim, with the exception of speaking, the foundational specifications for the item types on the annual summative assessment will remain the same as those for ACCESS for ELLS®. The rationale for this is twofold: (a) the current item types have been very successful and well-liked by the current WIDA Consortium states, having shown through research to be measuring the construct of interest, and (b) during the transition period, it will be critical to keep the computer- and paper-based versions of the annual summative assessment strictly comparable.

This does not mean, however, that the item specifications for the annual assessment are static. Since its inception, the ACCESS test has been research-based. Every year, one third to one half of the items are refreshed (with the performance-based assessment tasks refreshed much more frequently). In a cycle of continual research, item refreshment begins with refinements to item specifications based on what has been learned through research on the test and in the field since the last refreshment. During the transition period, we envision that both versions will follow the same specifications, reflecting the strengths and limitations of each. In other words, the listening and reading test items on the annual assessment will

remain selected response. By the end of the grant, the entire summative assessment will have been refreshed at least once, with parts of it having undergone two refreshment cycles.

We will develop new specifications for the computerized speaking test for Grades 1–12 modeled on the Center for Applied Linguistics’ Computerized Oral Proficiency Instrument. While the current test is administered in a one-on-one, face-to-face interview format and scored by the administrator during the assessment, the new specifications will call for a more task-based format. These new specifications for speaking will also be used for the on-demand screener and classroom benchmark speaking assessments.

Unlike the Grade 1–12 assessments, the kindergarten assessment will remain an individually administered assessment. However, technological enhancements will be used to help with the logistics of its administration (Section 2.9).

Tables 5 and 6 outline the number and types of forms and the number of items per form for the new computer-based annual summative test.

Table 5

Annual Summative Assessment: Items and Scoring

	Listening and reading		Writing and speaking	
	K	Grades 1–12	K	Grades 1–12
No. test forms	1	3/cluster (Tier A–C)	1	3/cluster (Tier A–C)
Item type	SR	SR	ECR	ECR
Administration	Individual	Group	Individual	Group
Scoring	TA	CS-M	TA	CS-HR

Note. SR = selected response. ECR = extended constructed response. TA = test administrator. CS-M = centrally scored by machine. CS-HR = centrally scored by human raters.

Table 6***Annual Summative Assessment: Number of Items/Tasks per Test Form/Domain (Grades 1–12)***

Tier	Listening	Reading	Writing	Speaking	Total
A	18 SR	24 SR	3 ECR	12 ECR	42 SR, 15 ECR
B	21 SR	27 SR	3 ECR	12 ECR	48 SR, 15 ECR
C	21 SR	27 SR	3 ECR	12 ECR	48 SR, 15 ECR

Note. SR = selected-response items. ECR = extended constructed-response tasks.

On-Demand Screener

The on-demand screener will follow the format of the WIDA MODEL™, which was refined through a research project involving iterative cognitive labs and then field-tested with several hundred students in each grade-level cluster. Shorter than the annual summative assessment, the screener will follow a semiadaptive format in both the computer-based and the individually administered mode. Because it is on-demand and can be given at any time, it is designed to be administered one-on-one.

The speaking portion of the Grade 1–12 screener, administered first, consists of eight performance-based tasks at progressively higher proficiency levels. The listening portion is administered next in a two-step process: a student’s performance on four items in Step 1 determines the level at which he or she continues the test: low, mid, or high. The writing portion, administered third, consists of a one-minute task designed to assess whether the student has any English writing proficiency. A student who demonstrates writing ability will be presented with one extended constructed-response task. Reading is administered last and in the same manner as the listening test, with a Step 1 followed by one of three levels (low, mid, and high) of Step 2.

Table 7 presents the maximum number of items and performance tasks any student will be administered on the on-demand screener. The test is designed to take 40–90 minutes to administer, with more proficient students requiring more time to demonstrate their full level of proficiency on the extended constructed-response tasks. The longer period of time for high-proficiency students is necessary because

the identification of students as ELs is a high-stakes decision, requiring ample evidence that a student is not in need of English language support.

Table 7

On-Demand Screener: Number of Items/Tasks per Domain (Grades 1–12)

	Speaking	Listening	Writing	Reading
Type of response	S/ECR	SR	S/ECR	SR
No. items/tasks	8 tasks	8 items	2 tasks	8 items

Note. SR = selected response. S/ECR = short and extended constructed response.

The on-demand screener for kindergarten differs from that for Grades 1–12 in several ways. As it is intended for very young children new to schooling, it is organized using a “stair-step” model, beginning with tasks at Proficiency Level 1, with each step increasing one proficiency level. Each step offers the child three opportunities to provide evidence of meeting the MPI for that level. The student stops at the step at which he or she fails to provide adequate evidence (i.e., reaches a ceiling). The listening and speaking portions are combined into one section of the test, administered before the reading or writing sections. Depending on a student’s age, schooling, and proficiency level, the kindergarten screener may take anywhere from 5 minutes (very low-proficiency students) to 30 minutes (high-proficiency students).

Classroom Benchmark Assessments

The development of the classroom benchmark assessments will give WIDA the opportunity to research and develop innovative computer-based item types, particularly for reading and listening. Our goal is to go beyond traditional multiple-choice items and develop more complex, machine-scoreable, constructed-response items that allow students to more directly provide evidence of their comprehension of aural or textual input by performing tasks aligned with their proficiency level and the MPIs, with appropriate support. Once these items have been researched, developed, and used in classrooms, our plan is to migrate their specifications up to the computer-based annual summative assessment.

We will develop an array of short, targeted benchmark assessments. Like the MPIs of the WIDA ELP standards, the assessments will be targeted by *grade level, language domain* (L = listening, R = reading,

Listening and Reading

The listening and reading inputs will follow research-based specifications that are fully aligned to the WIDA ELP standards and will be used as a foundation for the development of all the new assessments. However, the response spaces for the benchmarks will be designed using multisemiotic representations (including animations, dynamic and static images, and sound) to replace large amounts of text and focus the student on the item target. In this way, we will move away from traditional multiple choice and text-based constructed responses to innovative item types that more directly measure the targeted construct. Responses will be automatically scored, providing automated feedback to students and teachers immediately after each benchmark assessment is completed. We expect each targeted benchmark to include about 10 innovative items. Figure 2 shows an example of one type of innovative response space that can be used to allow students to demonstrate their ELP level in listening in the language of science.

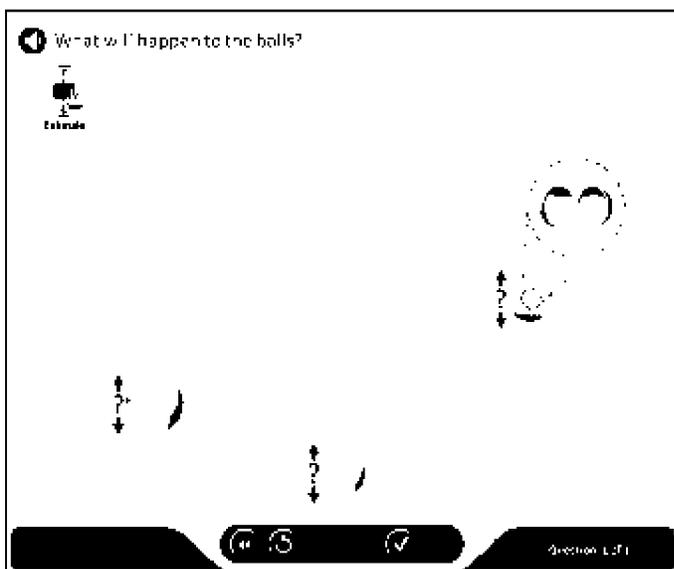


Figure 2. Example response space: Student manipulates the balls based on aural input.

Although the example in Figure 2 was originally designed to allow ELs to demonstrate science content knowledge using minimal language, the task (positioning the balls in a certain way by dragging them with a mouse) could also serve to demonstrate comprehension of linguistic input. For example, a listening input could ask students to display comprehension of a simple instruction to place the largest ball at the bottom of the container. More linguistically challenging listening input could ask students to

demonstrate their comprehension of more detailed elements, requiring a more fine-tuned placement of the objects—for example:

Emma was demonstrating to the class the outcomes of a scientific experiment. The results showed that the most massive steel ball floated on top of the liquid, whereas the wooden ball fell halfway down the container.

This example illustrates how one response space could be used to allow students to demonstrate, on different benchmark assessments, comprehension of linguistic input targeted at different levels of ELP.

Table 8 lists selected MPIs from the WIDA ELP standards and innovative response spaces that have already been developed to measure the intended construct more directly than multiple-choice questions. Again, one response space could be used for a range of MPIs and a range of proficiency levels. For example, students could demonstrate the ability to match main ideas in a reading text with their details by completing a picture, not just by physically matching two objects.

Table 8

Sample MPIs and Response Spaces

Sample MPIs	Response spaces
L, Gr. 9–12, LoMA, P2: Create or change graphs, equations, or points on coordinate planes	Creating and adjusting graphs (e.g., shading a portion of a geometric shape, drawing a line graph, extending a bar graph)
R, Gr. 6–8, LoLA, P3: Sequence plots of adventures using visual support	Ordering, completing cycles, completing a picture
R, Gr. 3–5, LoSS, P3: Compare/contrast different time periods or people using graphic organizers and sentences	Creating Venn diagrams, classifying
L, Gr. 1–2, SIL, P5: Match oral descriptions of school areas, personnel, or activities with individual needs or situations	Matching (e.g., dragging words, images, or animations to match stimuli)

Note. L = listening. R = reading. Gr. = Grade. LoMA = language of mathematics. LoLA = language of language arts. LoSS = language of social studies. SIL = social and instructional language. P = proficiency level.

Speaking and Writing

The speaking and writing tasks on the benchmark assessments will follow the same specifications as those on the annual summative assessment. However, on the speaking task, each benchmark assessment will consist of three extended constructed-response tasks at one proficiency level, providing three opportunities for students to meet the relevant MPIs. Each writing benchmark—requiring a much longer response time—will consist of only one writing prompt.

2.9 Mode of Administration

Annual Summative Assessment

The new *annual summative assessment* will be computer-administered. For *listening*, the audio input to be comprehended will be delivered directly via the computer, while for *reading*, written text will be presented on screen. Response options will be presented and selected by students on the computer and be machine-scored. For *writing*, prompts will be presented on screen, with responses either handwritten or keyboarded, depending on which option the student is more familiar with. *Speaking* prompts will be presented on screen, with responses digitally recorded by the computer. Both writing and speaking responses will be centrally scored by trained and monitored raters.

The computer-based mode of delivery for the speaking assessment will increase consistency in administration—that is, all students will experience the same administration language and procedures and hear the same prompts. Moreover, this approach will lessen the local test burden, as compared with the one-on-one administration now used with ACCESS for ELLs[®]. Centralized scoring by trained and monitored scorers will enable the use of a more refined scoring rubric. The ACCESS rubric is necessarily simple (“meets/does not meet task-level expectations”) because test administrators must quickly score responses while they administer the test. Finally, the digital recording of responses will provide data for research on the development of academic oral ELP.

The computer-facilitated administration of the kindergarten annual summative assessment will simplify one-on-one administration of the assessment when compared to the current kindergarten ACCESS. The role of the administrator will not be eliminated, but it will become less complex. As the kindergarten ACCESS is closely tailored to the proficiency level of each child, the automated scoring and routing features of the new computer-based test will ease the burden of selecting the appropriate next section for the student. The numerous manipulatives and cards used in the paper assessment will be automatically organized and presented on screen. In addition, during the grant period, a second form of the kindergarten assessment will be developed.

(Note that during each state's period of transition from the paper-based ACCESS to the new computer-based annual summative assessment, a paper-based option will be provided. For kindergarten, the current paper-based version of the kindergarten ACCESS will remain an option. For grades 1 to 12, the *listening* input will be media delivered over a playback device and *reading* texts presented in a test booklet, with students selecting responses in the test booklet. *Writing* prompts and written responses will likewise be in the test booklet. For *speaking*, prompts will be delivered via test booklet and audio playback device, with student responses recorded on a second device. Again, both written and speaking responses will be centrally scored with those of the computer-administered version.)

On-Demand Screener

Like the annual summative assessment, the on-demand screener will be computer-administered, (though available during the transition period in both computer- and paper-based versions). The modes of administration and response for each language domain will parallel those for the annual summative assessment. The use of computer technology will eliminate the need for a highly trained test administrator and enable multiple concurrent administrations, while the paper-based version, due to its adaptive nature, will require one-on-one administration. A locally trained language education professional will score the written and spoken responses (see Section 2.10).

The kindergarten screener will also be available in two parallel modalities, with the computer again aiding the administration of the assessment rather than replacing the test administrator, who will need to be well trained and experienced in working with kindergarten-aged children.

Classroom Benchmark Assessments

The classroom benchmark assessments will be available only in a computer-based format because, for the listening and reading assessments, they will contain innovative response spaces that cannot be replicated in a paper-based format. The use of computer technology will enable us to use innovative ways of presenting writing task demands and oral prompts that are more easily comprehended (e.g., through graphics, animations, audio, and video) and encourage the use of more academic English language in response. In addition, the development of computer-based benchmark assessments for use in a non-high stakes environment, across all four language domains, will help local programs make the transition to all computer-based testing in the future.

The classroom writing benchmarks will provide opportunities for ELs to keyboard their responses. However, those who are unfamiliar with computers or just learning to write or keyboard will still have the option of writing responses on paper.

2.10 Scoring Methods

Annual Summative Assessment

The annual summative assessment will be centrally scored. The selected-response listening and reading domains will be automatically scored by machine. Input of student responses will be either direct (for computer-based tests) or from machine-scanned test booklets (for paper-based tests).

Similarly, student responses in the writing domain will either be digitized during administration (if keyboarded) or scanned (if handwritten). Oral student responses to the speaking prompts will be digitized. These performance-based responses will be centrally scored by trained raters. For the field testing during the grant period, MetriTech, Inc., will score all constructed responses because of their familiarity with the WIDA rubrics and their high-quality training of raters. The current writing rubric for ACCESS for ELLs® has worked well and will be minimally updated to reflect the amplification of the WIDA ELP

standards. A new speaking rubric will be developed, however, to allow greater differentiation between responses to tasks than is currently possible. CAL has already conducted research on a more refined, 4-point rubric and will undertake its further development and implementation under this grant.

As discussed in Section 2.4, WIDA anticipates a turnaround time of approximately 4 weeks from the time students take the annual summative test until they receive their scores.

On-Demand Screener

Responses to the selected-response listening and reading items of the Grades 1–12 screener will be dichotomously scored automatically by the computer or by hand if the paper version was used. Extended constructed responses for writing and speaking will be captured on computer, paper, or recorder and scored by locally trained scorers.

Two innovations will be incorporated in the administrator scoring of the screener writing and speaking items and all locally scored performance-based assessments (screener and benchmarks). First, we will adapt CAL’s Multimedia Rater Training Program (MRTP) to provide intensive training and practice in scoring. The adapted MRTP will have the following characteristics: (a) interactive, technologically supported training, (b) content-based quizzes that provide diagnostic feedback as a rater learns material, (c) scoring quizzes that provide full justifications for scores, (d) computer-adaptive scoring practice that focuses rater-trainees’ attention on aspects of scoring they find difficult, using an underlying pool of pre-rated samples, helping raters internalize the criteria, and (e) a digitized library of pre-rated responses that can be used as benchmarks against which to compare trainee performance. While CAL’s MRTP has been developed for use in scoring task-based speech performance using speaking proficiency guidelines of the American Council on the Teaching of Foreign Languages (ACTFL), it will be easy to adapt the program for training on WIDA’s generic scoring rubric that operationalizes the proficiency levels of the WIDA ELP standards for scoring speaking and writing.

Turning to the second innovation, local scoring will be supported by a computer-based scoring model that provides raters with the resources they need to produce accurate and reliable ratings for the speaking and writing tasks in the on-demand screener. This scoring interface will be modeled on the one used in

CAL's Computerized Oral Proficiency Instrument (COPI). Features to be included from the COPI scoring module include (a) access to information about the task the student completed (e.g., instructions, graphics, audio, video animations), (b) benchmark speech samples, and (c) explanations and justifications of the ratings for each benchmark speech sample. Using the computer-supported program to record scores for each domain helps eliminate errors, simplify score recording for the test administrator, and achieve cleaner score reporting. It also allows raters to keep diagnostic notes on performance for student records, which can be appended to students' score reports if desired.

The kindergarten screener will be scored by administrators while the test is administered, but technological support for their training will be analogous to that described above.

Classroom Benchmark Assessments

Listening and Reading

A key feature of the innovative response spaces to be used in the listening and reading benchmarks is that they will be automatically scored and provide instantaneous feedback to teachers and students. In automatic scoring of innovative response spaces, the computer program keeps track of the location of objects on the screen and their relationship to each other. Tolerances are set for partial and full credit, and programming governs where objects can be placed, how many can be placed in particular locations, and whether they snap to locations. All of this information is synthesized using research-based automatic scoring algorithms developed during the piloting of the new items and confirmed through field testing.

In the benchmark assessments, partial-credit scoring may be used to provide diagnostic feedback on listening and reading comprehension. Based on (a) finely detailed specifications for the linguistic components (vocabulary level, morphology, syntax, discourse structure) that apply to the proficiency levels defined by the WIDA standards and (b) the levels and types of nonlinguistic support provided, auditory and textual input can be tagged at the word, phrase, and discourse level. Then, for example, in response to a task requiring comprehension of that input, if a student correctly manipulates only some on-screen elements, it may be deduced that the student only partially comprehends the input. The linguistic aspects of the portion not comprehended may be delineated for the teacher. If these form a pattern across

items in a benchmark assessment, specific feedback may be given on aspects of language needing more practice and development. Since each benchmark assessment will be aligned with a specific proficiency level and standard, at the very least the student and teacher will receive feedback on whether the student has provided evidence of that level of proficiency on that standard or whether more practice to develop proficiency is needed.

Speaking and Writing

Teachers will use the generic rater-training programs described above (the adapted MRTP and COPI) for the speaking and writing portions of the benchmark assessments. Computer-based scoring modules will be developed for each speaking and writing task. These will provide all the supports needed for an educator to transfer training in the generic scoring to scoring the specific task. These supports will include task-specific notes, anchor samples at each score point with rationales, and alternative benchmarks for each score point. As mentioned previously, the scoring interface will allow a rater to make notes about a student's performance. Test scorers will be encouraged to note strengths and weaknesses of a student's spoken or written response and to identify interventions, activities, or practice might help the student continue to develop spoken or writing proficiency.

2.11 Reports Based on Assessments

Score reports resulting from the ASSETS project will build on WIDA's 7-year experience with delivering meaningful, uniform score reports customized to the needs of the various stakeholders of the consortium. The specific score reports that will be generated for ASSETS assessments will be determined by the SEAs of consortium member states; however, we anticipate that score reports will target audiences similar to those for ACCESS for ELLs[®]. Currently, WIDA provides the following reports for the ACCESS assessment: (a) a *parent/guardian report* that presents test results visually and numerically to help parents and guardians to understand their children's ELP levels in the individual language domains, oral language, literacy, as well as comprehension, and that also provides a composite proficiency level and scale score; (b) a *teacher report* that provides more detailed information to educators, including scale scores for all domains and combinations of domains and raw scores for each of the WIDA ELP standards;

(c) a *student roster report* that gives teachers and administrators an overview of the proficiency levels and scale scores for all domain and composite scores for ELs in a school; (d) a *school frequency report* that shows teachers and administrators the distribution of ELs according to their language proficiency levels for each domain and combination of domains in a school, and (e) a *district frequency report* that provides the same information for an entire district. In collaboration with SEAs and LEAs, WIDA is already providing translations of the parent/guardian report in more than 30 languages and will continue this practice with the ASSETS assessments.

3. ASSESSMENT DEVELOPMENT PLAN

3.1 Approach to Test Development

Development of Test Items

Because language is a complex system of knowledge, skills, and abilities, language testers at the Center for Applied Linguistics (CAL) have for years used the approach recently categorized by Mislevy and his colleagues (e.g., Mislevy, Steinberg, & Almond, 2003) under the rubric of *evidence-centered design*. In the development of ACCESS for ELLs[®], the principles of evidence-centered design were adhered to as CAL's language testers sought to operationalize the WIDA ELP standards in a large-scale assessment. The *domain analysis* is provided by the WIDA ELP standards, as described in Section 2.2. *Domain modeling* is used to think about the evidence needed from students to demonstrate that they are meeting the MPIs of the WIDA ELP standards at the different proficiency levels. In designing test items, each item specification, each level of review, and each statistical analysis seeks to achieve a positive answer to the question:

If a child answers this question correctly or performs at this level on this constructed-response task, has he or she provided evidence of meeting the MPI at the given performance level, for the given standard, in the given domain, and at the given grade-level cluster?

The overall design of the test (*the assembly model*) is intended to collect sufficient measurement information while keeping the assessment short and practical. During the annual refreshment cycle, the *student model* is continually supplemented by additional research conducted by CAL and others that

provides further insight into our understanding of the construct. The *evidence model* likewise is refined annually through research, experience, and psychometric analyses that ensure that the assessment's items and tasks fit the demands of the Rasch measurement model (Wright & Stone, 1979). In particular, the *task model* for each type of selected-response item or performance-based task is critically examined through cognitive labs, piloting, and field testing before it becomes operational.

Language testers at CAL find evidence-centered design particularly powerful because of its connection with Toulmin's (2003) structure of arguments. In each phase of development, testers ask whether, for example, tasks are eliciting performance related to the construct (and what warrants and backings exist for that construct) and what alternative hypotheses (other than language proficiency) might account for student performance. This approach ensures that a research perspective covers all aspects of test development.

In addition, CAL follows the principles of *universal design*. All the assessments in the ASSETS system will adhere to style guides, graphics guidelines, layout templates, and other resources and specifications CAL has developed over the years in applying universal design principles to language proficiency tests for ELs in Grades K–12. With every innovation in CAL's approach to testing, new resources and specifications are developed. These resources and specifications detail, for example, the use of easy-to-read text; clear, high-contrast graphics and visuals in color or black and white; and clean, simple layouts. Graphic organizers, maps, and other visuals used in the ASSETS assessments will follow specific guidelines to ensure consistent presentation across all assessments that is appropriate to the grade level for which the assessment is intended.

New applications of the principles of universal design are piloted in cognitive labs, and resources and specifications are updated annually. The success of CAL's internal guidelines and specifications is confirmed through annual content and sensitivity reviews conducted on each new item or task, as well as through feedback from the field and statistical information on the performance of the test items and tasks.

Development Phases and Personnel Involved

CAL follows a rigorous approach to developing language tests involving four phases: (a) initial development, (b) piloting, (c) field testing, and (d) operationalization. Below, we briefly describe each of the phases of CAL's approach and then indicate the types of personnel involved in each.

Phase 1—Initial Development

The goal of the initial phase is to create agreed-upon plans for the design and development of the assessment, including initial test and item specifications, written clearly enough for all stakeholders to understand. At the end of this phase, carefully selected prototypes of actual items are ready for piloting.

Phase 2—Piloting

Piloting is an iterative process in which all aspects of the prototypical items, administration instructions, and scoring procedures are carefully researched, including the computer-user interface. Piloting is exploratory in nature, and each pilot has its own research questions. Evidence to test hypotheses about the test items and procedures is collected through a variety of qualitative and quantitative methods. For example, cognitive labs may be conducted with students to ensure that they understand the computer-user interface, the task demands, and the best way to respond; and focus groups may be held with scorers to ensure that the rubric is clear. Validity evidence is sought to support hypotheses about the task and evidence model, and when alternative hypotheses cannot be adequately disconfirmed, prototypes, rubrics, and scoring procedures are revised based on the research findings.. With successive pilots, more items may be developed and join the piloting pool as item specifications become tighter and more refined.

Phase 3—Field Testing

The goal of field testing is to confirm hypotheses about all aspects of the test items, ensure that all aspects of the administration and scoring work as intended, and collect data to link performance on new items with performance on existing items. For most assessments, more items will be developed than will ultimately be needed. For the ASSETS project, we plan to conduct the field test together with the annual operational test, appending a small set of field-test items and tasks to the operational test.

Phase 4—Operationalization

The goal of the operationalization phase is to finalize all materials to ensure they are ready for large-scale use.

Mentioned above and discussed in greater detail in Sections 3.5 and 4.1, some of the development work and validity research, rely on linking scores on the operational ACCESS for ELLs test with student performance on the new tests. This will require the involvement of current WIDA ACCESS consortium members. However, non-WIDA-ACCESS states (non-ACCESS states) can be involved in all phases of the development of the new assessments. During phase 1, development, non-ACCESS states will give their feedback and input into the written framework and test and item specification documents as well as review prototypes. During phase 2, piloting, LEAs and students in non-ACCESS states can serve as sites for the cognitive labs and piloting. During phase 3, field testing, LEAs and students in non-ACCESS states can participate in the data collection to examine the psychometric properties of the new assessments. Finally, during phase 4, operationalization, students in non-ACCESS states can participate in the full administration of the new assessments.

Personnel

Table 9 sets forth major steps in each of the ASSETS development phases and identifies the personnel to be involved in each.

Table 9***Development Phases, Tasks, and Principal Personnel***

Phases and tasks	Principal personnel
Initial development	
Create initial overall test design and development plan, initial test, and item specifications, with input and consensus from all stakeholders	Researchers and specialists in ESL education, applied linguists, language testing specialists, psychometricians, experts on career readiness standards, educators, computer testing experts (with consensual approval from SEA representatives and Technical Advisory Committee)
Develop and review item pool for piloting and assemble pilot-test form(s)	Language testing specialists
Develop ancillary materials for pilot test (including administrator/scorer materials)	Language testing specialists, professional development specialists
Pilot testing	
Conduct and score pilot test	Language testing specialists, qualitative researchers
Conduct pilot-test item analyses, reliability studies, and validation studies	Qualitative and quantitative researchers, psychometricians
Revise overall test design and development plan, including test and item specifications	Language testing specialists (with reviews by SEA representatives and Technical Advisory Committee)
Field testing	
Develop and review item pool for field test	Language testing specialists

Phases and tasks	Principal personnel
Assemble field-test forms	Language testing specialists, technology experts
Develop ancillary materials for field test (including administrator/ scorer materials)	Language testing specialists, professional development specialists, technology experts
Conduct field test	Language testing specialists, technology experts
Score field test	Language testing specialists, technology experts, educators
Conduct field-test item analyses, standard setting (as needed), and reliability studies	Psychometricians
Conduct field-test validation studies	Psychometricians, qualitative and quantitative researchers
Finalize design of all components of operational testing program	Language testing specialists, professional development specialists, technology specialists
Operationalization	
Assemble final operational test forms	Language testing specialists, technology specialists
Develop final score reports and score reporting system	Language testing specialists, psychometricians, educators, SEAs
Develop ancillary materials for operational test	Language testing specialists, technology specialists
Finalize plan for training and monitoring administrators/scorers and assemble final training materials	Language testing specialists, professional development specialists, technology specialists

Phases and tasks	Principal personnel
Conduct additional reliability studies	Psychometricians
Conduct additional validation studies	Psychometricians, qualitative and quantitative researchers
Finalize plan for continual monitoring and evaluation of operational testing program	Language testing specialists

3.2 Approach to Accommodations

WIDA has a proven history of working with SEA partners and national experts to develop and recommend appropriate accommodation policies for the ACCESS for ELLs[®] assessment. We will continue to do so in our work on ASSETS. The current edition of WIDA’s *Guidelines for Accommodating English Language Learners with Disabilities* (WIDA, n.d.) provides guidance for the following aspects of testing ELs with disabilities: (a) test directions, (b) presentation format, (c) setting format, (d) timing/scheduling, and (e) response format. WIDA will work with SEA partners and national experts to ensure that appropriate accommodations can be provided on the new ASSETS technology-based assessments for ELs with disabilities.

In addition, WIDA is implementing a new performance assessment, Alternate ACCESS for ELLs[™], designed specifically for ELs who have the most significant cognitive disabilities and thus are unable to take regular ELP tests, such as ACCESS, even with accommodations. WIDA plans to draw on the expertise gained from developing the Alternate ACCESS assessment in developing the ASSETS assessments.

Finally, WIDA will extend research it has conducted on options for providing an ELP testing solution for blind ELs that does not confound ELP and Braille proficiency constructs—a problem that almost inevitably arises when an existing language test, such as ACCESS, is simply translated into Braille.

Although not part of the ASSETS project, WIDA will continue researching and refining Alternate ACCESS and an instrument for blind ELs during the grant period and will endeavor to ensure their compatibility with the new ASSETS assessments, incorporate the assessment results into overall reporting systems, and, if possible and appropriate, create a computer-based form of the alternate tests.

3.3 Approach to Developing Scoring Materials

Annual Summative Assessment

As mentioned in Section 2.10, selected-response listening and reading items on the annual summative test will be scored by computer, whereas the speaking and writing constructed responses will be scored by human raters. For the grant period, MetriTech, Inc., will score the constructed response items using its online scoring system (MTscore). MetriTech has a proven record of hiring well-qualified raters using criteria such as completion of at least a bachelor's degree at an accredited college or university, work experience (particularly teaching or education-related experience), and pre-employment test scores. Many scorers have backgrounds in education and are active or retired teachers. Potential scorers participate in a rigorous online training program and must demonstrate mastery of the scoring rubrics, methods, and task types before scoring any operational tasks.

To ensure that the scoring rubric is being applied consistently across scoring sessions, specially prepared calibration sets are routed to each scorer daily. To the scorer, these look like regular student responses. However, master scorers have already reviewed each response in these sets and created a key of expected scores. Once the scorer completes the set, the system checks his or her scores against those in the master key. This approach allows for the immediate detection and correction of "scorer drift," the tendency for a scorer to begin deviating from the rubric over time. Agreement between the active and master scorer must exceed the standards established for the project (80% exact agreement) or the scorer is locked out of the system until he or she has successfully completed a retraining with the master scorer.

As a final check to ensure interrater reliability throughout the scoring process, 20% of all constructed responses are rescored by a master scorer. The master scorer then has the opportunity to provide feedback

to individual scorers to keep their scoring at the highest level of accuracy possible. Interrater information is kept for future analysis, inclusion in technical reports, and daily feedback to the individual scorers.

On-Demand Screener and Classroom Benchmark Assessments

Listening and Reading

For the on-demand screener, the scoring of the listening and reading selected-response items will be automatically scored by the computer or hand-scored by the test administrator using a scoring key.

For the classroom benchmark assessments, the innovative item types to be used in the listening and reading benchmarks will be only computer-administered and -scored and pose no special operational issues. The development of the scoring criterion, especially for partial-credit scoring, will follow a rigorous process during the test development stages, as described in Section 3.1. In particular, based on the linguistic features of the input and the response task, test developers will make hypotheses about the performance of students who demonstrate full comprehension, partial comprehension, and incomplete comprehension. These hypotheses will be initially confirmed, revised, or rejected through iterative rounds of cognitive labs (pilots) with the items. During the labs, examinee performance on the items will be carefully watched, and examinees queried about their comprehension of the input (e.g., by being asked to paraphrase what they understood in their own language or in English) and their reasons for choosing to complete the assessment task the way they did. Since each benchmark assessment will target a certain proficiency level, student participants in the cognitive labs for that benchmark will be both below and at the targeted level (based on current designations of proficiency according to the WIDA standards through ACCESS for ELLs® or W-APT scores, corroborated by teacher judgment).

The revised hypotheses about scoring, including those relating to response patterns that indicate partial understanding (partial credit), will be further confirmed through item field testing. Through empirical data modeling, partial-credit scoring will be examined to see whether or not it fits the Rasch measurement model and adds measurement information to total scores.. Items for which partial-credit modeling does not hold will be scored dichotomously in the operational benchmark assessment. For items for which partial-credit modeling does hold, a final check on the interpretation of the partial-credit

scoring—in light of the linguistic demands of the input to be comprehended—will be reviewed and approved by language education specialists and applied linguists before becoming part of the operational interpretation of the meaning of the performance.

Speaking and Writing

As described in Section 2.10, the scoring of the performance-based speaking and writing tasks will be done locally by trained teachers. Technology will support this scoring in two ways: through a generic multimedia rater-training program and through a task-specific rating module.

The development of the scored materials (e.g., anchor performances, benchmark performances, and scored performances for rating practice) will follow a vigorous procedure during the test development process. Obtaining performances to be used for these purposes will involve the following steps: (a) collection of a wide variety of performances during field testing (at least 500 per task); (b) internal calibration by CAL staff; (c) initial scoring of a subset of responses by at least five CAL staff members; (d) training of external scorers; (e) double or triple scoring of the entire set by external scorers; and (f) analysis of interrater agreement and selection of final performances. Development of the rater-training materials will involve these additional steps: (a) initial development of the materials for internal CAL use and review; (b) revision of the self-training materials and preparation for piloting by external scorers; (c) use of the materials as preparation for the external scorers, who will provide organized feedback on the materials and performances on calibration sets designed to test the materials' efficacy; (d) further revisions and review by CAL staff; and (e) a final pilot with untrained scorers, followed by their performances on rating calibration sets.

At the local level, some programs may want to increase the reliability of the ratings on the speaking and writing benchmarks. WIDA will provide guidance on how to incorporate a local scoring program. Such a program might involve requiring that items be scored by two independent raters, instituting procedures for arbitrating discrepant ratings, and ensuring that raters do not rate their own students. Such a program could be put in place for the on-demand screener, the speaking and writing benchmarks, or all rater-scored assessments.

3.4 Approach to Developing Reporting System

The governing states of the WIDA-ASSETS Consortium, especially the Steering Committee, will play a key role in designing a reporting system that meets the needs of multiple stakeholders and can be integrated with other state assessment systems. Colleagues from WestEd will consult on the types of data to be included and compatibility with other systems, while Data Recognition Corporation (DRC), the platform provider for the assessments during the grant period, will assist with technical aspects of operationalizing the reporting system.

3.5 Approach to Quality Control, Piloting, and Field Testing

WIDA follows a rigorous approach to quality control in all its test development and PDSR (i.e., printing, distribution, scoring, and reporting) activities, and it will continue this practice with the ASSETS project. Every year, a team representing consortium SEAs conducts a quality control site visit to CAL, in which documentation of all processes and procedures, responsibilities of the test development team, and qualifications of CAL staff members are reviewed and reported on to the full consortium board. The quality control procedures followed at CAL include clearly delineated multiple levels of internal review and signoff, external content reviews, external bias and sensitivity reviews, external post-field test reviews for final selection of items on operational forms, and internal and external editorial reviews and signoffs. All of CAL's psychometric work is also overseen by a technical advisory committee. A similar process occurs at our PDSR vendor, MetriTech, Inc., to verify the accuracy of score reporting and will be implemented at DRC for the work performed under this grant.

As described in Section 3.1, we follow a very rigorous approach to test development. Access to students for participation in piloting and field testing is coordinated through WIDA Central, working with SEAs. While the primary focus during piloting is an ever-expanding group of prototypical items, specific attention is paid to testing accommodations for ELs with disabilities and collecting data on their suitability. In addition, because all items are targeted to the proficiency levels across the entire continuum, very low- and very high-proficiency students are always selected for participation in pilots in order to collect data on the items that are intended to allow them to show what they can do.

Our approach to field-testing all items—for whatever domain or assessment (annual summative, on-demand screener, benchmarks)—will be to include them as part of the annual testing program during Year 3 of the project. Students selected to participate in the field testing will take one test (or a portion of one test) in one domain shortly after taking the annual test. Students in states that have made the transition to computer-based testing will take the computer-based items (including benchmark assessments), whereas those who take the paper-based version will be given the paper-based versions of annual assessment and on-demand screener items. Working with consortium states' SEAs—and through them, LEAs—we will ensure inclusion of a wide variety of ELs—from those recently arrived, to those who have been reclassified, to those with disabilities.

4. RESEARCH AND EVALUATION

4.1 Plan for Psychometric Analyses

Annual Summative Test

Because the ASSETS annual summative test will be built on the foundation of the current ACCESS for ELLs[®], we will illustrate our planned approach to psychometric analysis of the new test with examples from our well-established existing procedures for analyzing items and test forms. In addition, to support the validity of interpretation of the quantitative analyses, we include descriptions of qualitative analyses that will be conducted.

Measurement Models

As with ACCESS for ELLs[®], the Rasch measurement model (Wright & Stone, 1979) will form the basis of the psychometric analysis undertaken in developing the ASSETS summative test. The Rasch model (e.g., Wilson, 2005) guided all measurement decisions throughout the development of the ACCESS assessment (Kenyon, 2006). Careful analysis based on Rasch fit statistics guided decisions about the inclusion, revision, and deletion of items during the development and field-testing of the ACCESS test forms. For listening, reading, and speaking, a dichotomous Rasch model was used; for writing, a Rasch rating scale model was used. A similar approach will guide psychometric analyses during the development of the ASSETS summative test.

Equating and Scaling

The equating and scaling procedure used with ACCESS for ELLs[®] was designed through adjacent grade-level cluster testing to derive a single, vertically equated scale from kindergarten to Grade 12 so that progress could be measured across all grade levels (Kenyon, 2006; Kenyon, MacGregor, Li, & Cook, in press). In addition, horizontal equating was conducted across the three tiers of ACCESS within each grade-level cluster so that progress could be measured across tiers. In brief, this scaling was accomplished during the field test based on an elaborate common item design—across both tiers and grade-level clusters—that spanned two series of complete test forms. Concurrent calibration was used to determine item difficulty measures. These item difficulty measures were used to create the ACCESS scale scores used for reporting results on the test. Such careful procedures will be used to ensure the stability of the next-generation ASSETS scale.

Item Refreshment and Annual Equating

WIDA has a well-established plan for annual refreshment of ACCESS for ELLs[®] to prevent item exposure and ensure continuous improvement of the assessment. Annually, between one third and one half of the items on the operational test forms are refreshed. Annual equating is conducted to place results on new series onto the ACCESS score scale through a common-item equating procedure. Items that are not revised are anchored to the difficulty values from previous series. Through a similar careful process, the score scale will be maintained as we transition to the next generation of assessments.

Reliability and Errors of Measurement

For ACCESS for ELLs[®], a variety of approaches—including Cronbach's alpha and stratified alpha—are used to provide estimates of the test reliability by domain and composite score. In addition, item response theory (IRT) information function and IRT-based conditional standard errors of measurement are provided by domain. Complete information on the reliability of each year's ACCESS, including interrater reliability for the writing test, is provided in the ACCESS annual technical report. Such techniques will be used to analyze the reliability of each assessment in the transition to the next generation of assessments.

Tier system

ACCESS for ELLs[®] was designed to measure a wide range of proficiency levels as described in the WIDA ELP standards. To make the test appropriate for students across proficiency levels, the test items are presented in three overlapping tiers for each grade-level cluster (Section 2.8). The development of thematic folders presenting items at three adjacent proficiency levels—arranged across the five main proficiency levels of the WIDA ELP standards in listening, reading, and writing—makes it possible to administer the test level that is most appropriate for the student’s proficiency, which in turn increases the reliability of the measurement and decreases the amount of measurement error. This approach will be used during the period of transition, while parallel paper- and computer-based versions of the new annual assessment are used across states in the WIDA-ASSETS Consortium.

Validity

In examining the validity of ACCESS for ELLs[®], we use an argument-based approach (e.g., Kane, 2006; as applied to language testing, see Bachman, 2005; Mislevy, Steinberg, & Almond, 2002). This approach combines a focus on the assessment (*assessment argument*) with a focus on its use (*use argument*). Central to this approach is a clear statement of proposed interpretations of test results. Similar to ACCESS, the overarching purpose of the assessments developed under the ASSETS project will be to assess the developing ELP of English learners in Grades K–12 in the United States following WIDA’s ELP standards. Additional purposes include (a) identifying the ELP level of students with respect to the WIDA ELP standards; (b) identifying students who have attained ELP; (c) assessing annual ELP gains using a standards-based assessment instrument; (d) providing districts with information that will help them evaluate the effectiveness of their ESL/bilingual programs and determine staffing requirements; (e) providing data for meeting federal and state accountability requirements with respect to student assessment; and (f) providing information that enhances instruction and learning in programs for ELs.

Below, we describe studies addressing the validity of ACCESS, stating the claim to be investigated, evidence collected or to be collected to support the claim, and the methodology used or to be used to test the validity of the claim. Some validation studies of ACCESS have been completed, and more are

planned. We present these here as concrete examples of the types of validity studies we will undertake for the ASSETS project, as the current assessment transitions to the next generation.

Construct validity. Construct validity—what test scores mean and what kinds of inferences they support—is the central concept underlying the ACCESS for ELLs® test validation process. Evidence for construct validity integrates evidence from both content- and concurrent-related validity. For interpretation of students’ performance on ACCESS to be meaningful, test scores must correlate highly with independent measures of language proficiency. Patterns of correlation with other ELP assessments should demonstrate convergent and discriminant validity—that is, tests designed to measure similar skills should correlate more highly than tests designed to measure distinctly different skills. Here, we discuss our approach to the ACCESS test validation process to illustrate the approach we will take in establishing the validity of the new ASSETS computer-based tests and to emphasize that the foundation for the new ASSETS annual assessment—ACCESS for ELLs®—has already accumulated much validity evidence.

The first steps in establishing the construct validity of the ACCESS assessment are careful specification of content and review of the ACCESS items assessing the MPIs. Empirical evidence—especially item-level data such as item fit and point-biserial correlation—is used to identify the presence of construct-irrelevant elements. Another indication of construct irrelevance might be differential item functioning (DIF). To minimize construct-irrelevant variance that can occur when raters score constructed-response items more leniently or more severely than established standards, a number of procedures and interrater reliability checks are instituted, which will be used throughout the ASSETS project. Finally, since research on the interaction between student characteristics (e.g., native language, sociocultural background) and item features suggests (a) that items may be *psychometrically* but not necessarily *psychologically* equivalent (Ferrara & Chen, 2011; Pearson & Garavaglia, 2003; Sato, 2011) and (b) that different item features may present construct-irrelevant challenges to students that could affect their processing of information and thus their demonstration of knowledge related to the targeted construct, cognitive interviews will be conducted with a purposeful sample of EL and non-EL students. These interviews will use both concurrent and retrospective structured protocols and require students to

provide verbal reports on their processing of a selected set of items in order to examine whether any construct-irrelevant factors are affecting their access to and engagement with the items and whether the items are measuring the targeted constructs as intended (Almond et al., 2009; Ericsson & Simon, 1980; Ercikan, 2006; Leighton, 2004; Paulsen & Levine, 1999; Sato, Rabinowitz, Gallagher, & Huang, 2010).

Minimizing item bias. Minimizing item bias is essential in ensuring that ACCESS measures students' ELP without introducing construct-irrelevant elements in the performances on which the measurement is based. Tests that require students to have specific cultural knowledge and skills not taught in school can result in bias because of differences in student background and out-of-school learning (Camilli & Shepard, 1994). Three measures that are taken to minimize bias in the ACCESS assessments will be adopted in the ASSETS project. First, careful attention will be paid to content validity during the item-writing, cognitive-lab, field-testing, and item-review processes. Second, every item will be approved by a bias and sensitivity panel before it is administered to any student. Third, operational data will be examined to identify items with high levels of DIF. Such items will then be examined to determine if item performance differences between identifiable subgroups of the population are due to extraneous or construct-irrelevant information, making the items unfairly difficult for a certain subgroup. The inclusion of such items will be minimized in the test development process.

In the past, DIF of ACCESS items has been assessed for males vs. females and Hispanics vs. non-Hispanics at each cluster in which the items are administered for each ACCESS series, with findings reported in the ACCESS annual technical reports. Items with high levels of DIF are removed from the operational test at the earliest possible moment. The collection of additional ancillary background data on ELs in the ASSETS project will make it possible to create additional groupings of students.

Concurrent validity. The results from a study of the relationship between ACCESS and four other ELP tests (IDEA Proficiency Test; Language Assessment System; Language Proficiency Test Series; Maculaitis Assessment of Competencies Test of English Language Proficiency II; Gottlieb & Kenyon, 2006; Kenyon, 2006) showed a moderate to strong correlation between performance on ACCESS and performance on these tests. This finding provides strong support for the claim that performance on

ACCESS represents an assessment of ELP. However, the absence of very high correlations provides some support for the claim that the standards-based ACCESS is assessing the construct of ELP somewhat differently from the other, older tests.

Consequential validity. Some testing experts use consequential validity to refer to the social consequences of using a particular test for a particular purpose. The use of a test is said to have consequential validity to the extent that society benefits from use of the test. Other testing experts believe that the social consequences of using a test—however important they may be—are not properly part of the concept of validity. Despite these disagreements, it is believed that consequential validity should be an integral part of test validation.

The most important consequence of ELP tests is the use of the test data to make judgments about the proficiency of ELs in K–12 programs. Since such decisions are usually made on the state and local levels, the consequential validity of ACCESS is best addressed through a series of carefully planned research and evaluation studies with input and involvement from state and local stakeholders. In moving from ACCESS to the next generation of ELP testing, the most relevant consequential validity issues are (a) whether the assessments are being implemented as designed and (b) whether the theory of action (Section 1) is being realized, including whether the intended effects on individuals and institutions are being achieved. To this end, the WIDA-ASSETS Consortium has been working on evaluating the impact of adopting the WIDA ELP standards and the ASSETS assessments on state and local levels. Details of these research and evaluation efforts are addressed in Section 4.2. Necessary in supporting these efforts and informing the interpretation of their findings is the systematic analysis of documents (e.g., administration manuals, training and professional development materials, scoring protocols, score reports, interpretation guides, proficiency-level descriptors) to ensure that the purpose, uses, ELP domain and language modality definitions, and population definitions are consistently and accurately represented. Research suggests that inconsistent or insufficient documentation and communication of these critical factors can affect assessment implementation and thus the validity of interpretation of assessment results (AERA, APA, & NCME, 1999; Assessment and Accountability Comprehensive Center, 2009; Crooks,

Kane, & Cohen, 1996; Gorin, 2007; Kane, 2007; Lane, Parke, & Stone, 1998; Linn, 1997). This document analysis will help ensure that (a) the potential for misuse or misunderstanding of the assessment resulting in negative unintended consequences is mitigated and (b) the potential for fidelity of implementation and implementation conditions that facilitate the intended consequences of the assessment is improved.

Comparability Between Paper- and Computer-Based Annual Summative Assessment

Because we anticipate having both a paper-based and a computer-based version of the summative assessment, it is critical that the tests measure proficiency in the same construct and with the same degree of precision and that their scores be interchangeable. Five validity hypotheses should be tested: (a) test content and content specifications are the same, (b) scores have the same factor structure, (c) scores have the same measurement precision, (d) score distributions differ only in difficulty and hence are equitable, and (e) scores are highly related to one another.

These five validity hypotheses will be examined using experimental data gathered via a within-subjects design for each domain assessed by the summative test. During the field-test phase, students will be administered paper- and computer-based versions of at least one domain of the same summative test. The paper-based version will be administered during the operational testing window, and the computer-based version, within 2 weeks. A minimum of 500 students from each grade-level cluster will be enrolled as participants. The item parameters from the paper-based test will be used for common-item equating, making it possible to equate studies to determine mode effects. The results of the study will also inform future computer-based test development to minimize potential mode effect during the time of transition to computer-based only.

On-Demand Screener

All developmental activities and analyses associated with the new summative assessment will be applied to the new computer-based on-demand screener as well. For example, the items on the screener test will be reviewed by a bias and sensitivity panel, and no items will be administered to students unless approved by the panel.

To put the results of the screener test on the same scale as the summative test, the screener will be field-tested by domain using a common-person equating design. In addition, items that have been retired from previous summative assessment administrations may be included in the screener, also enabling common item linking. During the field-testing phase, for each domain in each grade-level cluster and each version (paper- or computer-based), students who take the summative test will subsequently be administered one domain of the appropriate screener version. Results from the field test will be analyzed using the software program WINSTEPS. A concurrent calibration of the two tests across students will allow us to (a) estimate the item difficulty of the screener on the same scale as the summative assessment and (b) investigate any possible differences between a domain on the summative assessment and the same domain on the screener.

Placing results of the new screener on the same scale as the summative assessment will allow us to interpret results in terms of the proficiency levels of the WIDA ELP standards. Because the screener will be shorter than the summative assessment, additional steps will be taken to ensure accurate placement decisions. First, the screener will include extra items designed to test ELP at Levels 4 and 5. Second, we will recommend that the ASSETS policy committee adjust upwards the cut score for placement out of language support services by one or two standard deviations to reduce the incidence of false positives (i.e., students who need English language support services despite performance on the screener indicating that they do not).

One important goal for the screener is that it accurately predict how well a student will perform on the summative test. In service of this goal, we will collect and analyze data during the operational year on the performance of students on the screener and their later performance on the annual summative assessment.

Classroom Benchmark Assessments

The main purpose of the classroom benchmark assessments is to provide information to stakeholders on whether a student is achieving targeted growth in developing ELP in a given language domain for a given standard. A secondary purpose is to bring concrete examples of the proficiency levels of the WIDA ELP standards into classroom instruction. Therefore, the benchmark tests should provide maximum

information around the relevant cut scores. To ensure that these assessments serve this purpose, each will be targeted very specifically.

During the field-test phase, these short tests will be administered to students who have recently completed the annual summative assessment. Results from this common-person design will be analyzed to (a) confirm that the items or tasks are at the intended levels, (b) collect initial validity evidence of their use as benchmark measures of targeted performance vis-à-vis performance on the annual assessment, and (c) provide an interpretation of the score in terms of the WIDA ELP scale score. Items or performance tasks whose empirical results confirm that they are operating at the intended proficiency level will be chosen for the benchmark tests.

4.2 Plan for Examining Washback

To determine whether the ASSETS assessments are being implemented as intended and whether their intended effects are being achieved, a consequential validity study will be conducted. This study will focus on all ASSETS assessment components: the annual summative assessment, classroom benchmarks, on-demand screener, and formative assessment resources. Two methods will be used to collect consequential validity evidence. First, an online survey will be administered. The survey instrument will look at a number of areas associated with implementation of the ASSETS assessments, including but not limited to:

1. Teachers' perceptions of what is being assessed;
2. Teachers' and administrators' preparation for assessment administration;
3. Teachers' and administrators' interpretation and use of results;
4. Types of professional development activities engaged in to support the assessment;
5. Types of curricular material (if any) adopted as a result of participation in the assessment;
6. Parents' perceptions of the assessment and its purposes; and
7. Students' perceptions of the assessment and its purposes.

Second, several focus group sessions will be conducted with SEAs and LEAs on the topics listed above.

Data from the surveys and focus group sessions will be analyzed, interpreted, and published as part of the

annual technical report. Results from this study will be reviewed by the assessment development team and consortium members. If unforeseen consequences are found, assessment design, materials, administration, or implementation will be modified accordingly.

5. PROFESSIONAL CAPACITY AND OUTREACH

5.1 Plan for Supporting Teachers and Administrators

WIDA will develop a comprehensive professional development system to help educators implement the ASSETS project's annual summative assessment, on-demand screener, and classroom benchmarks. The assessment system will include administration manuals, training materials, sample items for practice scoring, and logistical information. Particular efforts will go toward preparing materials for teachers on the benchmark assessments—when and why to use them and how to interpret their results to guide instruction. These materials will be available in a portable electronic format and online to facilitate access, whether through self-training or district or school trainings. Educators will also have opportunities to attend face-to-face trainings with certified consultants. These trainings will be coordinated with state personnel to meet the specific needs of the different states throughout the consortium. To ensure the effectiveness of training sessions and materials, WIDA will collect evaluations from participants in face-to-face and online trainings. The variety of training formats and venues will not only help build capacity, but also accommodate different learning styles.

Educators will have access to an interpretative guide that will provide general information about the assessments and guidance in the interpretation of their scores. Additional help in interpreting scores and using results in instructional planning and decision making will be available in the form of training materials, including case scenarios, and blended trainings. Districts and states will receive guidance on the analysis of longitudinal data. Like the administration manuals and other pre-assessment materials, these post-assessment materials will be available in a variety of formats to accommodate different learning styles and maximize dissemination.

Using these tools and the ELP standards, WIDA will prepare materials to help educators integrate academic language formative assessment into their educational practice. Educators will be trained in how

to use the standards to set language targets and mine data from the ASSETS assessments to inform and improve their educational practice. All of these materials will also enhance educators' communication with families and the community about the education of ELs, as discussed next.

5.2 Strategy and Plan for Informing the Public and Key Stakeholders

The ASSETS project will implement a multifaceted strategy for informing consortium members, other key stakeholders, and the wider public. A dedicated website will offer information, news, and materials for the general public. A password-protected area of the website will provide training materials, videos, and confidential information about the assessments for consortium members. An annual meeting will give consortium members the opportunity to share information, provide input, vote on key policy decisions, and network with colleagues from other member states. Further, the consortium Steering Committee will meet two to four times each year to provide direction for the project and will share the results of these meetings with the member states. Conference calls, a bulletin, and webinars will also help keep members up-to-date. Through all of these avenues, SEAs will have timely information to share with stakeholders within their states. In addition, SEA representatives and project staff will attend regional and national meetings to share information about the project and to learn from others to inform ASSETS development. Finally, the WIDA Help Desk will be available during business hours by phone (toll-free) and email to answer questions or make referrals to other staff when greater expertise is required.

6. TECHNOLOGY APPROACH

6.1 Uses of Technology and Rationale

WIDA is committed to using technology to the maximum extent appropriate to develop, administer, and score the assessments and report assessment results. In close collaboration with WestEd, WIDA will develop all assessment items to an open-licensed interoperability standard that is industry-recognized and approved by the U.S. Department of Education. The interoperable design will support (a) test-test content portability; (b) transfer of assessments from one technology platform to another; (c) consistent assessment delivery across consortium states; (d) consistent application of accessibility features, including universal design of items; and (e) coordination and compatibility of the system with relevant practices of the Race

to the Top (RttT) assessment consortia. To maximize the interoperability of the assessments, a corpus of codes or tags will be used to specify (a) key elements of each test item; (b) alternative ways of presenting test content to maximize accessibility; (c) characteristics of the range of student test-takers; and (d) student and system behaviors expected to result when particular codes or tags are applied to an item.

The Accessible Portable Item Profile (APIP) standards are one example of the type of codes or tags that will be used to maximize interoperability. APIP incorporates key elements of established Question and Test Interoperability specifications, Access for All specifications, and the National Instructional Materials Accessibility Standard to create a single standard for accessible item file format, accompanied by documentation of intended behaviors when the standardized APIP tagging structure is applied to test items. The RttT assessment consortia have been discussing standards such as APIP, and the WIDA-ASSETS Consortium will adopt and use standards consistent with those selected by the RttT consortia in order to maximize the interoperability of the ASSETS assessments and their items. Documentation will allow full interoperability across different delivery platforms in the WIDA-ASSETS Consortium states.

WIDA recognizes the urgent importance of moving large-scale student assessment from paper-based to computer-based test delivery, as well as the need to leverage technology to deliver more robust reporting tools and instructional resources to educators as part of a comprehensive and interactive computer-based assessment system. Following a rigorous selection process, WIDA has chosen the INSIGHT Online Learning System—a product of the Data Recognition Corporation (DRC)—as the delivery platform for all field-testing activities under this grant. DRC INSIGHT is a secure system that pairs maximum control and flexibility with features critical to the ASSETS project. These features include (a) the ability to deliver summative, formative, screener, and benchmark assessments in computer-adaptive or fixed-form formats; (b) support for interactive, innovative test items that fully leverage the available technologies of a computer-based test environment, such as animation (dynamic graphics and simulations), graphing, drag-and-drop, short answer, completion, and hot spot; and (c) the ability to capture and store spoken responses for the speaking component of the ASSETS tests. DRC

INSIGHT will deliver approximately 56,000 items for the ASSETS project assessments to at least 7,000 students during field testing.

6.2 Strategies for Addressing Technology-Related Barriers

WIDA is sensitive to the varying technological capabilities of districts and schools and is committed to working with districts to minimize the need for extensive technology upgrades. DRC INSIGHT was designed to work with the technology commonly available in schools; the desktop-based online testing interface is fully compatible with Microsoft Windows (2000+) and Apple Mac OS X (10.4+) operating systems and has the capability to automatically update itself with the newest published version of code. When needed, DRC will conduct a technology survey to assess current district capabilities and areas of need related to school online testing hardware and make recommendations or provide assistance to resolve technological barriers.

Slow or intermittent Internet connectivity can have an impact on the e-testing experience. To mitigate this impact, DRC has developed a local caching service that allows test data to be housed locally on school-owned hardware, minimizing the need for a speedy Internet connection. DRC also has systems in place to ensure that capacity requirements do not impede the implementation of online testing. The DRC INSIGHT infrastructure was developed to be fully scalable, providing the flexibility needed to accommodate each state's capacity needs. DRC carefully monitors current system usage and capacity requirements to plan for future needs and adds more application or web servers as required to ensure smooth, fully supported student data handling and system downloads.

7. PROJECT MANAGEMENT

7.1 Workplan and Timeline

WIDA has established a workplan and timeline for the ASSETS project (Table 10) that takes into account the multiplicity of activities required for successful completion. These include the need for National Development Advisory Group and Steering Committee meetings, assessment development activities, interoperability planning, validity research, professional development, and policymaking.

Table 10

Project Timeline (see note at end of chart for key)

Activities	Lead	Year 1	Year 2	Year 3	Year 4
Clarify roles, relationships, goals, & tasks	PI,W				
Convene AG, ST, & TAC meetings	PI,W				
Establish subcommittees ^a	PI,W				
Create initial test design & development plan	C				
Establish corpus of codes	WE				
Create item development style guide	WE				
Conduct item writer training	WE				
Create initial test & item specifications	C				
Develop & review item pool for piloting	C				
Assemble pilot-test form(s)	C				
Develop ancillary materials for pilot test	C				
Conduct validation research	WE,C,U				
Create PD materials	W				
Conduct pilot test	C				
Score pilot test	C				
Develop consortium materials re: accommodations	WE				
Conduct pilot test on PD materials	W				
Conduct pilot-test item analyses	C				
Conduct pilot-test reliability & validation studies	C				
Revise overall test design & development plan	C				

Activities	Lead	Year 1	Year 2	Year 3	Year 4
Develop & review item pool for field test	C				
Assemble field-test forms	C				
Develop ancillary materials for field test	C				
Conduct field test	C				
Score field test	C,MT				
Conduct field-test item analyses	C				
Conduct field-test reliability & validation studies	C				
Finalize design of operational testing program	C				
Establish plan for scale-up & operationalization	W				
Conduct final review of PD materials	W				
Assemble final operational test forms	C				
Develop final score reports & reporting system	C				
Develop ancillary materials for operational test	C				
Finalize plans for administrator training/	C				
Assemble final materials for administrator training	C				
Review interoperability	WE				
Conduct additional reliability & validation studies	C				
Finalize test monitoring/plan	C				
Convene project closeout meetings	W				
Submit final reports to USED	PI				

Note. Lead = responsible entity. AG = advisory group. ST = Steering Committee. TAC = Technical Advisory Committee. PI = Wisconsin Department of Public Instruction. W = WIDA. C = Center for Applied Linguistics. WE = WestEd. U = UCLA. MT = MetriTech. PD = professional development.

^aSubcommittees: accommodations, score reporting, EL definition.

7.2 Identifying, Managing, and Mitigating Risks

In this proposal, we have outlined a solid development strategy carefully thought out to mitigate risk. We have a clear plan for the gradual change from paper-based to computer-based testing. Our plan for the annual summative assessment is conservative, incorporating a period when paper- and computer-based tests will be used simultaneously and the states—with the support of DRC during the field testing and whoever the platform provider might be after the grant period—will gradually be helped to make the transition to computerized assessment. Likewise, the on-demand screener will be available in both paper- and computer-based formats.

The riskiest parts of the proposal lie in the innovative item design for listening and reading in the benchmark assessments. Our vision is to migrate the item specifications from the benchmarks to the annual summative assessment once the research on these innovative item types is complete and the items themselves have been shown to function with stability. In addition, because there cannot be strictly parallel paper- and computer-based versions of these tasks, we plan to wait to migrate item specifications up to the annual summative assessment until the majority of students are using the computer-based version. Since the annual summative test is on an annual refreshment plan, it will be possible to transition to the new item types gradually.

We have strong experience with good project management practices. ASSETS will adopt these proven practices—including weekly communication between partners, quarterly face-to-face meetings, and meetings with the Executive Committee, full Board of Directors, and Technical Advisory Committee—to closely monitor progress and ensure that resources are being used efficiently.

7.3 Adequate Budget

Based on WIDA’s experience managing a large consortium and developing comprehensive and complex assessments, we believe that our budget is reasonable and adequate to support the development of assessments that meet the requirements of the priority as outlined in this proposal.

7.4 Estimated Costs and Plans for State Implementation

Current WIDA Consortium states pay \$23 per student tested with ACCESS for ELLs[®]. Based on development costs and projected costs for computer-based distribution, scoring, and reporting, we estimate that this next generation of assessments—particularly the annual summative and screener tests—will be comparable or, more likely, lower in price. WIDA states have indicated that they anticipate no change in the level and source of funding for required assessments for accountability purposes.

7.5 Quality and Commitment of Personnel

The work of each of the partnering entities in the ASSETS project—WDPI, WCER, CAL, WestEd, UCLA, DRC, and MetriTech—will be directed and managed by well qualified professionals who have been working and leading in their respective disciplines for many years and who have developed the capacity of their staff to ensure that the work on this project will be accomplished with a high degree of quality and timeliness as conceptualized by the SEA consortium members and partnering entities. Furthermore, all the members of the National Development Advisory Group and the Technical Advisory Committee are nationally recognized leaders in their fields and whose experience and scholarship will provide wise counsel from multiple perspectives. The key personnel for the project, the directors and managers of various components of the project in most cases, are listed below by organization.

Wisconsin Department of Public Instruction: Project Director **Lynette K. Russell**, PhD, is the Director of Educational Accountability WDPI. She has a background in educational administration and supervises the statewide assessment system for all Wisconsin public schools. She will guide and oversee all reporting requirements, implementation and coordination of grant activities, and all work of the contractor to ensure that all goals, objectives, and deliverables are met. WDPI Assistant Project Director, **Philip Olsen**, MA, is the Assistant Director of Educational Accountability in WDPI. He oversees the

statewide assessment system for the alternate assessments for students with disabilities and accommodations for English language learners and will guide the work of two additional WDPI staff members: **(1) Standards Based Assessment Consultant** (To be assigned), who will have extensive experience in consulting, coordinating, and communicating with interdepartmental resources, administrators, district staff, educators, and policy makers at the local, state, and national level; and **(2) WDPI Consortium Project Coordinator** (To be hired), who will have extensive experience in communication, test administration and project coordination. In this full-time position, he or she will oversee the day-to-day coordination of the steering committee activities to ensure the products and services meet the needs of the states and federal requirements. In addition, this person will work closely with the WIDA Project Manager on the assessment development related organizational and logistical aspects of the project.

Wisconsin Center for Education Research (WIDA “Central”): As the managing partner of the ASSETS project, WIDA staff at WCER will coordinate, and in some cases direct, the efforts of all entities, including ASSETS consortium activities and subcontracts. In addition WCER will spearhead professional development, and engage in research related to the project. These efforts will be directed by Principal Investigator **Timothy Boals**, PhD, executive director of the WIDA Consortium. He is responsible for leadership, strategic planning, operations, and board relations. He has a background in curriculum, language education, Spanish language and literature, bilingual/ESL, and educational policy. Co-Principal Investigator **Elizabeth Cranley**, PhD, is associate director of the WIDA Consortium and is responsible for products and services. She has a background in comparative education and ESL. She will direct test development from WCER. WIDA Lead Developer **Margo Gottlieb**, PhD, is the primary developer of the WIDA ELP standards and has been a key force in the development of all major WIDA initiatives. Her background is in English proficiency testing, bilingual and ESL education, EL policy, and standards development. For ASSETS, Dr. Gottlieb will serve as a senior advisor and guide operationalization of the ELP standards at no cost to the grant.

Additional key WCER staff includes **Carsten Wilmes**, PhD, who, with a background in language testing, manages all WIDA operational assessments and assessments-in-development and is the primary liaison with the CAL office; **Mariana Castro**, MA, who directs and manages development and implementation of all WIDA professional development and teacher resource development, including those associated with ASSETS; Research scientist **H. Gary Cook**, PhD, who directs research for WIDA, including non-psychometric research for ASSETS; **WIDA project manager** (to be hired) who will have extensive experience in management of large, complex projects. The manager will direct the goals and deliverables of the grant at WCER, including compliance with requirements for research with human subjects, contract administration, report preparation, and dissemination. This person will also serve as the primary liaison with the consortium member states and oversee the organizational and logistical aspects of the project; and the **WIDA assessment project coordinator** (to be hired) who will have experience in professional development, test administration, and project coordination. This individual will oversee the day-to-day operations of the ASSETS test development process and help coordinate research and development of curriculum and technology-based training materials.

Center for Applied Linguistics: **Dorry M. Kenyon**, PhD, is a CAL vice president and director of the CAL Language Testing Division. He directs or serves as senior advisor on a variety of projects related to EL assessment. He also serves as CAL's chief psychometrician and the leader of its Psychometrics/Research Team. Active in research on language testing, Dr. Kenyon is particularly interested in the application of new technology to language assessment problems and will serve as director of the ASSETS project at CAL and as a senior project advisor for the project at no cost to the grant. **Margaret E. Malone**, PhD, is senior testing associate at CAL and co-director of the National Capital Language Resource Center. Dr. Malone will serve a project advisor for the development of the ASSETS assessments, particularly the speaking tests.

Other key CAL staff who will contribute to the ASSETS project include **Dr. David MacGregor**, who manages the Psychometrics/research Team for ACCESS for ELLs® as well as the development of WIDA's forthcoming Spanish academic language test and; **Jennifer Christenson**, who oversees test

development for the ACCESS for ELLs[®] and Alternate ACCESS assessments, including a staff of approximately 21 people (10 FTE); **Dr. Shu Jing Yen**, who serves as a psychometrician for ACCESS for ELLs[®]; **Catherine Cameron**, who manages operations activities for research on the technology-based ONPAR assessment in science and math for ELs and other students with reading challenges; **David Gabel**, who manages item development for ONPAR; and **Anna Z. Todorova**, who serves as project manager for the ACCESS program and also leads the quality control program at CAL. Each of these individuals brings expertise that will inform and direct the ASSETS assessment development project, including the management of approximately 15 additional staff members (approximately 10 FTEs).

WestEd: **WestEd** staff will serve as technical advisors to WIDA, providing expert guidance on issues related to the project's goals and objectives. **Robert Linqianti** will consult regarding EL population definition, policy, and accountability. **Dr. Aida Walqui** will bring expertise is in teacher professional development, teacher quality, and models for professional capacity building and outreach. **Dr. Edynn Sato** will facilitate coordination with RttT consortia (e.g., on technology approach; interoperability; item types; population definitions; accessibility and accommodation strategies), correspondence with Common Core State Standards, and validity frameworks for special population assessment. **Jeffrey Eng**, with his strong technology background and role as project manager and liaison with SMARTER Balance Assessment Consortium, will work on tasks related to interoperability.

University of California, Los Angeles: **Dr. Alison Bailey** and **Margaret Heritage** of UCLA will work with WIDA personnel to develop learning progressions for the English language associated with school success and career readiness. They will work with other UCLA staff to study the impact of the progressions on teacher assessment and instructional practices with ELs in a sample of K–12 content and ESL teachers. They will conduct analyses of these practices and report results to WIDA to refine ongoing assessment development.

Data Recognition Corporation and MetriTech, Inc: **Ms. Ara Lotzer**, Senior Project Manager at DRC, will provide overall coordination for the delivery of the online field testing test platform and

customer support. She has nine years of project management experience and more than five years of experience with online assessments.

MetriTech, Inc.: As MetriTech, Inc.'s Vice President of Operations, **Ms. Susan Feldman**, has more than 20 years of corporate and governmental experience organizing procedures and personnel to achieve time-sensitive objectives, including work for the U.S. Department of Commerce. She has managed the printing, distribution, scoring, and reporting of the WIDA Consortium's ACCESS for ELLs test since its inception in 2005 and has overseen the processing and scoring of millions of items, including over 30 million ELP constructed-response items since 2009.

Advisory Groups to guide and review ASSETS project work

- A **Steering Committee** composed of consortium SEA representatives will provide direction for the scope of the project, the design of the components, and policy directives.
- A **National Development Advisory Group** will advise on test content development. In addition to WCER and CAL key personnel, members of the advisory group will include **Alison Bailey** and **Margaret Heritage**, UCLA; **Edward Roeber**, Michigan State University; **Mary J. Schleppegrell**, University of Michigan; and **Robert Linquanti**, **Edynn Sato**, and **Aida Walqui**, West Ed; and an expert in computer-based teaching and learning and/or testing.
- A **Technical Advisory Committee (TAC)** will advise primarily on issues of psychometrics and other technical aspects of assessment. TAC members will include **Carol Chappelle**, University of Iowa; **Jamal Abedi**, UC Davis; **Aki Kamata**, University of Oregon; **Michael Hock**, Vermont Department of Education; and **Carol Myford**, University of Illinois at Chicago; **Lyle Bachman**, UCLA.

Project Narrative

Other Narrative

Attachment 1:

Title: Pages: Uploaded File: **1238-References.pdf**

Attachment 2:

Title: Pages: Uploaded File: **1239-MOUs.pdf**

Attachment 3:

Title: Pages: Uploaded File: **1240-ManagementPartnerDoc.pdf**

Attachment 4:

Title: Pages: Uploaded File: **1241-FY11 Indirect Cost Rate Agreement.pdf**

Attachment 5:

Title: Pages: Uploaded File: **1242-Resumes.pdf**

Attachment 6:

Title: Pages: Uploaded File: **1243-LettersOfCommitment.pdf**

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Memorandum of Understanding

This memorandum of understanding (MOU) is between the Alabama Department of Education (ALDOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

ALDOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including ALDOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

ALDOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

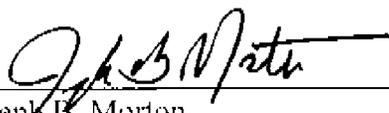
The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. ALDOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. ALDOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. ALDOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the ALDOE shall adopt the Project assessments or assessment related instruments.

7. ALDOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, ALDOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect ALDOE's current agreement with WCER. However, ALDOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once ALDOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For ALDOE



 Dr. Joseph B. Morton
 State Superintendent of Education
 Alabama Department of Education

_____ 5/16/11
 Date

For WCER

(b)(6)

~~Don Miner~~ *Mike Hardiman*
~~Assistant Vice-Chancellor~~ *Director, Purchasing Service*
 University of Wisconsin-Madison

_____ 5/11/2011
 Date

(b)(6)

 Tim Boas, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

_____ 5/9/2011
 Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Delaware Department of Education (DEDOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

DEDOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including DEDOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

DEDOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. DEDOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. DEDOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. DEDOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the DEDOE shall adopt the Project assessments or assessment related instruments.

7. DEDOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, DEDOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect DEDOE's current agreement with WCER. However, DEDOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once DEDOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For DDOE

(b)(6)

Martha Toomey, Director
Exceptional Children Resources

5/11/11
Date

(b)(6)

Linda Rogers, Associate Secretary
Teaching & Learning

5/11/11
Date

(b)(6)

Karen Field Rogers
Associate Secretary, Financial Reform
& Resource Management

5/18/11
Date

(b)(6)

Dr. Lillian M. Lowery
Secretary of Education

5/19/2011
Date

For WCER

(b)(6)

Don Miner
Assistant Vice-Chancellor
University of Wisconsin-Madison

(b)(6)

Tim Boals, Ph.D.
Executive Director –WIDA Consortium
Wisconsin Center for Education Research
(WCER)

5-26-11

Date

5/24/11

Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the District of Columbia Office of State Superintendent of Education (OSSE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

OSSE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including OSSE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

OSSE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. OSSE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. OSSE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. OSSE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the OSSE shall adopt the Project assessments or assessment related instruments.

OSSE / WCER MOU

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Idaho State Department of Education (SDE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners in pre-kindergarten through grade twelve.

SDE, is not an existing member of the WIDA Consortium, but wishes to join the WIDA Consortium for the purposes outlined in this.

WCER and the WIDA Consortium, including SDE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

SDE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

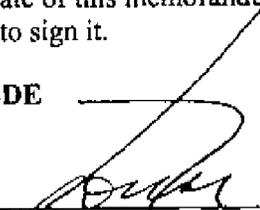
1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. SDE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. SDE is joining the WIDA Consortium solely for the purposes expressed in this MOU. This MOU does not include administration of the current version of the ACCESS for ELLs®.
6. SDE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. SDE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments

or assessment related instruments developed under the Project, whereby, the SDE shall adopt the Project assessments or assessment related instruments.

7. SDE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, SDE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall execute a data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. However, SDE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once SDE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For SDE


Name Tom Liska
Title Superintendent of Public Instruction
Idaho State Department of Education

May 19 2011
Date

For WCER

(b)(6)

Don Miner
Assistant Vice-Chancellor
University of Wisconsin-Madison

5-26-11
Date

(b)(6)

Tim Boals, Ph.D.
Executive Director - WIDA Consortium
Wisconsin Center for Education Research (WCER)

5-25-2011
Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Illinois State Board of Education (ISBE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

ISBE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including ISBE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

ISBE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. ISBE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
3. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
4. This MOU does not supersede any existing agreements between the parties.
5. ISBE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.
6. ISBE hereby assures that it will comply with all Project program requirements issued by ED.
7. In accordance with 34 C.F.R. 75.128, ISBE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
8. The parties shall have the right to terminate this MOU without cause at any time during the term by giving thirty (30) days notice in writing. Termination of this MOU will not

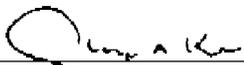
ISBE / WCER MOU

affect ISBE's current agreement with WCER. However, ISBE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.

9. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
10. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once ISBE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For ISBE

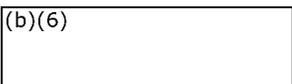


Name Dr. Christopher A Koch
Title State Superintendent of Education
Illinois State Board of Education

5/14/11

Date

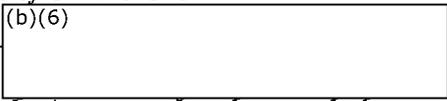
For WCER



Don Miner
Assistant Vice-Chancellor
University of Wisconsin-Madison

J-26-11

Date



Tim Boals, Ph.D.
Executive Director - WIDA Consortium
Wisconsin Center for Education Research (WCER)

5-25-2011

Date



Paul R. LePage
GOVERNOR

STATE OF MAINE
DEPARTMENT OF EDUCATION
23 STATE HOUSE STATION
AUGUSTA, MAINE
04333-0023

Stephen L. Bowen
COMMISSIONER

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Maine Department of Education (MDOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

MDOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including MDOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

MDOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. MDOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.

MDOE / WCER MOU

OFFICES LOCATED AT THE BURTON M. CROSS STATE OFFICE BUILDING

AN EQUAL OPPORTUNITY EMPLOYER

PHONE: (207) 624-6600
PR/Award # S368A110001

FAX: (207) 624-6700
e11

TTY: 1-888-577-6690

5. This MOU does not supersede any existing agreements between the parties.
6. MDOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. MDOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the MDOE shall adopt the Project assessments or assessment related instruments.
7. MDOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, MDOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect MDOE's current agreement with WCER. However, MDOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once MDOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For MDOE

(b)(6)

Stephen L. Bowen
 Commissioner
 Maine Department of Education

4/28/2011

Date

For WCER

(b)(6)

Don Miner
 Assistant Vice-Chancellor
 University of Wisconsin-Madison

5/11/2011

Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Maryland State Department of Education (MSDE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

MSDE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including MSDE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

MSDE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

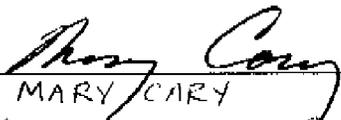
1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. MSDE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. MSDE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. MSDE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the MSDE shall adopt the Project assessments or assessment related instruments.

MSDE / WCER MOU

7. MSDE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, MSDE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect MSDE's current agreement with WCER. However, MSDE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once MSDE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For MSDE


 Name MARY CARY
 Title ASSISTANT STATE SUPERINTENDENT
 Maryland State Department of Education

5-18-11
 Date

For WCER

(b)(6)
 Don Miner
 Assistant Vice-Chancellor
 University of Wisconsin-Madison

5-26-11
 Date

(b)(6)
 Tim B...
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5-25-2011
 Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Massachusetts Department of Elementary and Secondary Education (ESE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners in pre-kindergarten through grade twelve.

ESE, is not an existing member of the WIDA Consortium, but wishes to join the WIDA Consortium for the purposes outlined in this.

WCER and the WIDA Consortium, including ESE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

ESE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. ESE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. ESE is joining the WIDA Consortium solely for the purposes expressed in this MOU. This MOU does not include administration of the current version of the ACCESS for ELLs®.
6. ESE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. ESE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments

ESE / WCER MOU

or assessment related instruments developed under the Project, whereby, the ESE shall adopt the Project assessments or assessment related instruments.

7. ESE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, ESE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall execute a data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. However, ESE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once ESE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For ESE

(b)(6)

Name

Title

Massachusetts Department of Elementary and Secondary Education

Date

5-16-11

For WCER

(b)(6)

Don Miner

Assistant Vice-Chancellor

University of Wisconsin-Madison

Date

5-25-11

(b)(6)

Tim Boals, Ph.D.

Executive Director - WIDA Consortium

Wisconsin Center for Education Research (WCER)

Date

5/23/2011

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Missouri Department of Elementary and Secondary Education (DESE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

DESE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including DESE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

DESE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. DESE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. DESE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. DESE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the DESE shall adopt the Project assessments or assessment related instruments.

7. DESE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, DESE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect DESE's current agreement with WCER. However, DESE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once DESE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For DESE

(b)(6)

Name *Jane M. VonDe Zande*
 Title *Director of Assessment*

Missouri Department of Elementary and Secondary Education

May 13, 2011
 Date

For WCER

(b)(6)

Don Miner
 Assistant Vice-Chancellor
 University of Wisconsin-Madison

5-26-11
 Date

(b)(6)

Tim Boals, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5-20-2011
 Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Montana Office of Public Instruction (OPI) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

OPI, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including OPI, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

OPI wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. OPI acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. OPI hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. OPI shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the OPI shall adopt the Project assessments or assessment related instruments.

7. OPI hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, OPI, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect OPI's current agreement with WCER. However, OPI will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once OPI and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For OPI

(b)(6) _____ Date 4/26/2011
 Name Madalyth Quevedo
 Title Chief of Staff
 Montana Office of Public Instruction

For WCER

(b)(6) _____ Date 5/11/2011
~~Don Miner~~ Mike Hardiman
~~Assistant Vice-Chancellor~~ Director, Purchasing Services
 University of Wisconsin-Madison

(b)(6) _____ Date 5/3/11
 Tim Boas, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

Memorandum of Understanding

This memorandum of understanding (MOU) is between the New Hampshire Department of Education (NHDOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

NHDOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including NHDOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

NHDOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. NHDOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. NHDOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. NHDOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the

Project, whereby, the NHDOE shall adopt the Project assessments or assessment related instruments.

7. NHDOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, NHDOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect NHDOE's current agreement with WCER. However, NHDOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once NHDOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For NHDOE

(b)(6)

Name

5/9/11

Date

Title
New Hampshire Department of Education

For WCER

(b)(6)

~~Don Minor~~ *Mike Hardiman*
Assistant Vice-Chancellor *Director, Purchasing Services*
University of Wisconsin-Madison

5/18/2011

Date

(b)(6)

Tim Boals, Ph.D.
Executive Director - WIDA Consortium
Wisconsin Center for Education Research (WCER)

5/17/2011

Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the New Jersey Department of Education (NJDOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

NJDOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including NJDOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

NJDOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. NJDOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. NJDOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. NJDOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the NJDOE shall adopt the Project assessments or assessment related instruments.

7. NJDOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, NJDOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect NJDOE's current agreement with WCER. However, NJDOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once NJDOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For NJDOE

(b)(6)

 Name
 Title
 New Jersey Department of Education

5/4/11

 Date

For WCER

(b)(6)

~~Don Miner~~ *Mike Hardiman*
~~Assistant Vice-Chancellor~~ *Director, Purchasing Service*
 University of Wisconsin-Madison

5/17/2011

 Date

(b)(6)

~~Tina Boals, Ph.D.~~
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5/13/2011

 Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the New Mexico Public Education Department (NMPED) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners in pre-kindergarten through grade twelve.

NMPED, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including NMPED, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

NMPED wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. NMPED acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. NMPED hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. NMPED shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the

Project, whereby, the NMPED shall adopt the Project assessments or assessment related instruments.

7. NMPED hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, NMPED, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect NMPED's current agreement with WCER. However, NMPED will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once NMPED and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For NMPED,

(b)(6)

Hanna Skandera
Secretary of Education, Designate
New Mexico Public Education Department

5.4.11
Date

For WCER

(b)(6)

~~Don Miner~~ Mike Hardiman
~~Assistant Vice-Chancellor~~ Director, Purchasing Services
University of Wisconsin-Madison

5/11/2011
Date

(b)(6)

Tim Boals, Ph.D.
Executive Director - WIDA Consortium
Wisconsin Center for Education Research (WCER)

5/9/2011
Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the North Carolina State Board of Education (NC SBE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

NC SBE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including NC SBE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

NC SBE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. NC SBE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. NC SBE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. NC SBE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the NC SBE shall adopt the Project assessments or assessment related instruments.

7. NC SBE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, NC SBE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect NC SBE's current agreement with WCER. However, NC SBE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once NC SBE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For NC SBE

(b)(6)

 June Atkinson
 Superintendent
 North Carolina State Board of Education

May 20, 2011

 Date

For WCER

(b)(6)

 Don Miner
 Assistant Vice-Chancellor
 University of Wisconsin-Madison

5-25-11

 Date

(b)(6)

 Tim Boals, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5-25-2011

 Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the North Dakota Department of Public Instruction (ND DPI) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

ND DPI, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including ND DPI, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

ND DPI wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. ND DPI acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. ND DPI hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. ND DPI shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the ND DPI shall adopt the Project assessments or assessment related instruments.

7. ND DPI hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, ND DPI, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect ND DPI's current agreement with WCER. However, ND DPI will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once ND DPI and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For ND DPI

(b)(6)

Bob Marthall
 Assistant Superintendent
 North Dakota Department of Public Instruction

5-19-11

Date

For WCER

(b)(6)

~~Don Miner~~ Mike Hardiman
 Assistant Vice-Chancellor Director, Purchasing Services
 University of Wisconsin-Madison

5/17/2011

Date

(b)(6)

Tim Boals, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Oklahoma State Department of Education (OSDE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

OSDE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including OSDE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

OSDE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. OSDE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. OSDE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. OSDE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the OSDE shall adopt the Project assessments or assessment related instruments.

7. OSDE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, OSDE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect OSDE's current agreement with WCER. However, OSDE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once OSDE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For OSDE



 Janet C. Barresi
 State Superintendent of Public Instruction
 Oklahoma State Department of Education

5-13-11

 Date

For WCER

(b)(6)

~~Don Miner~~ *HARDIMAN*
 Assistant Vice-Chancellor *Research Director*
 University of Wisconsin-Madison

5/17/2011

 Date

(b)(6)

 Tim Boals, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5-17-2011

 Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Pennsylvania Department of Education (PDE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

PDE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including PDE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

PDE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. PDE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. PDE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. PDE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the PDE shall adopt the Project assessments or assessment related instruments.

PDE / WCER MOU

7. PDE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, PDE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect PDE's current agreement with WCER. However, PDE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once PDE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For PDE

(b)(6)

5/12/11

Name Carolyn Dumbrowski Date
 Title Deputy Secretary Elementary and Secondary Education
 Pennsylvania Department of Education

For WCER

(b)(6)

5/18/2011

~~Den Miner~~ Michelle Hardiman Date
~~Assistant Vice Chancellor~~ Director, Purchasing Services
 University of Wisconsin-Madison

(b)(6)

5/18/11

Tim Boals, Ph.D. Date
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Rhode Island Department of Education (RIDE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

RIDE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including RIDE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

RIDE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. RIDE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. RIDE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. RIDE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the RIDE shall adopt the Project assessments or assessment related instruments.

7. RIDE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, RIDE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect RIDE's current agreement with WCER. However, RIDE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once RIDE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For RIDE

(b)(6)

Name _____
 Title *Chief, Ed Excellence and Inst. Eff.*
 Rhode Island Department of Education

19 May 11

Date

For WCER

(b)(6)

Don Miner
 Assistant Vice-Chancellor
 University of Wisconsin-Madison

5-25-11

Date

(b)(6)

Tim Boals
 Tim Boals, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

May 23, 2011

Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the South Dakota Department of Education (SD DOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

SD DOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including SD DOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

SD DOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. SD DOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. SD DOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. SD DOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the SD DOE shall adopt the Project assessments or assessment related instruments.

SD DOE / WCER MOU

7. SD DOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, SD DOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect SD DOE's current agreement with WCER. However, SD DOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once SD DOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For SD DOE

(b)(6) _____ 4-25-11
 Name *Wade Fogans* Date
 Title *Director, Office of Assessment + Technology*
 South Dakota Department of Education

For WCER

(b)(6) _____ 5/11/2011
~~Don Miner~~ *Mike Hardiman* Date
~~Assistant Vice-Chancellor~~ *Director, Purchasing Services*
 University of Wisconsin-Madison

(b)(6) _____ 5/3/11
 Tim Boals, Ph.D. Date
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Utah State Board of Education and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners in pre-kindergarten through grade twelve.

The Utah State Office of Education (USOE) is not an existing member of the WIDA Consortium, but wishes to join the WIDA Consortium for the purposes outlined in this.

WCER and the WIDA Consortium, including USOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

USOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. USOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. USOE is joining the WIDA Consortium solely for the purposes expressed in this MOU. This MOU does not include administration of the current version of the ACCESS for ELLs®.
6. USOE, consistent with Utah State Board of Education approval, hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. USOE shall enter a separate WIDA Consortium MOU for the operational administration of any

USOE / WCER MOU

assessments or assessment related instruments developed under the Project, whereby, the USOE shall adopt the Project assessments or assessment related instruments.

7. USOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, USOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall execute a data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. However, USOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once USOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For USOE

(b)(6)

May 9, 2011
Date

~~Name~~ Judy W Park
~~Title~~ Associate Superintendent
Utah State Office of Education

For WCER

(b)(6)

5/17/2011
Date

~~Name~~ Mike Hardiman
~~Title~~ Assistant Vice-Chancellor Director, Purchasing Services
University of Wisconsin-Madison

(b)(6)

5/13/11
Date

~~Name~~ Tim Boals, Ph.D.
Executive Director—WIDA Consortium
Wisconsin Center for Education Research (WCER)

Memorandum of Understanding

This memorandum of understanding (MOU) is between the State of Vermont Department of Education (VTDOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

VTDOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including VTDOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

VTDOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. VTDOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. VTDOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. VTDOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the VTDOE shall adopt the Project assessments or assessment related instruments.

VTDOE / WCER MOU

7. VTDOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, VTDOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. Upon receipt of an EAG award by the WIDA Consortium, the parties shall amend section 2F of their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project. All other provisions and obligations of the existing data use agreement shall remain unchanged and in full force and effect.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect VTDOE's current agreement with WCER. However, VTDOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once VTDOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For VTDOE

(b)(6)

Name
 Title
 State of Vermont Department of Education

5-12-11

 Date

For WCER

(b)(6)

~~Don Miner~~ *Mike Hardiman*
~~Assistant Vice-Chancellor~~ *Director, Purchasing Services*
 University of Wisconsin-Madison

5/18/2011

 Date

(b)(6)

~~Tim Boals, Ph.D.~~
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5-18-11

 Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Virginia Department of Education (VDOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

VDOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including VDOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

VDOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. VDOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. VDOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. VDOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the VDOE shall adopt the Project assessments or assessment related instruments.

7. VDOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, VDOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect VDOE's current agreement with WCER. However, VDOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once VDOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For VDOE

(b)(6)

5-4-11

Name _____
 Title *Superintendent of Public Instruction*
 Virginia Department of Education

 Date

For WCER

(b)(6)

3/17/2011

~~Don Miner~~ *Mike Hardiman*
~~Assistant Vice-Chancellor~~ *Director, Purchasing Services*
 University of Wisconsin-Madison

 Date

(b)(6)

 Tim Boals, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5/11/2011

 Date

Memorandum of Understanding

This memorandum of understanding ("MOU") is between the Wisconsin Department of Public Instruction ("DPI") and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research ("WCER"); DPI and WCER are hereinafter referred to collectively as the "Parties."

The purpose of this MOU is to set forth the understanding of the Parties regarding the Project, as defined below.

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners in pre-kindergarten through grade twelve.

DPI, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including DPI, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register, Vol. 76, No. 75, dated Tuesday, April 19, 2011, at pages 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives, is to develop the next generation of the ACCESS for ELLs⁶⁰ English language proficiency test (the "Test") to ensure that the Test and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

The Parties therefore agree as follows:

1. The term of this MOU shall begin on the effective date of this MOU (as stated below) and end on the termination date of the Project.
2. The Parties will enter a separate MOU for the operational administration of any assessments or assessment-related instruments developed under the Project.
3. The Parties acknowledges that the DPI will be the Project applicant, (the designated WIDA Consortium member that will apply for the EAG funding) and act as the fiscal agent for the Project.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible EAG applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the Parties.
6. DPI will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project.
7. DPI will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, DPI, by entering this MOU, is bound by the terms and conditions stated in the EAG Project application.

9. The Parties shall include in their data use agreement for the Project, which will be in force during the term of the Project, research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment-related instruments developed under the Project.
10. The Parties shall have the right to terminate this MOU without cause at any time during the term of this MOU by giving notice to the non-terminating parties in writing. Termination of this MOU will not affect DPI's current ACCESS for ELLs agreement(s) with WCER. DPI will not be able to remain in the WIDA Consortium upon completion of the Project if it does not adopt or use the assessments or assessment-related instruments developed under the Project by the end of the Project period.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. The Parties shall comply with all federal and state laws.

This MOU will become effective upon the date that all Parties have signed it. The effective date of this MOU shall be the date on which it is signed by the last party to sign it.

For Wisconsin Department of Public Instruction

(b)(6)

Suzanne Linton
Director of Management Services

5-26-2011
Date

For WCER

(b)(6)

Don Miner
Assistant Vice-Chancellor
University of Wisconsin-Madison

5-25-11
Date

(b)(6)

Tim Goals, Ph.D.
Executive Director - WIDA Consortium
Wisconsin Center for Education Research (WCER)

5/23/2011
Date

Memorandum of Understanding

This memorandum of understanding (MOU) is between the Wyoming Department of Education (WY DOE) and the Board of Regents of the University of Wisconsin System, on behalf of the University of Wisconsin-Madison's Wisconsin Center for Education Research (WCER).

WCER is the organizational home of the WIDA Consortium, a multi-state consortium of state departments of education that acts in collaboration to research, design and implement a standards-based educational system that promotes equitable educational opportunities for English learners (ELs) in pre-kindergarten through grade twelve.

WY DOE, through a separate agreement with WCER, is an existing member of the WIDA Consortium.

WCER and the WIDA Consortium, including WY DOE, desire to work collaboratively using U.S. Department of Education ("ED") Enhanced Assessment Instrument Grant ("EAG") funding to be awarded under the EAG funding opportunity announced in the Federal Register / Vol. 76, No. 75 / Tuesday April 19, 2011 / 21977 to 21984 (the "Project"). The purpose of the Project, among other objectives is to develop the next generation of the ACCESS for ELLs® English language proficiency test to ensure that the ACCESS for ELLs® and WIDA's standards and assessment system correspond to a common set of college- and career-ready standards* in English language arts and mathematics (*as defined by the Project announcement).

WY DOE wishes to enter this MOU with WCER to provide an assurance that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period.

The Parties therefore agree as follows:

1. The term set forth within this MOU is hereby in effect from the effective date of this MOU through the end of Project period.
2. The parties will enter a separate MOU for the operational administration of any assessments or assessment related instruments developed under the Project.
3. WY DOE acknowledges that the Wisconsin Department of Public Instruction (the "Project Applicant") is the designated WIDA Consortium member that will apply for the Project funding.
4. WCER shall not, and hereby certifies that it will not, partner with any other eligible applicants applying for an award under the same competition.
5. This MOU does not supersede any existing agreements between the parties.
6. WY DOE hereby assures that it will adopt or utilize any instrument or assessments developed under the Project by a time no later than the end of the Project period. WY DOE shall enter a separate WIDA Consortium MOU for the operational administration of any assessments or assessment related instruments developed under the Project, whereby, the WY DOE shall adopt the Project assessments or assessment related instruments.

WY DOE / WCER MOU

7. WY DOE hereby assures that it will comply with all Project program requirements issued by ED.
8. In accordance with 34 C.F.R. 75.128, WY DOE, by entering this MOU, is bound to every statement and assurance made by the Project Applicant in the Project application.
9. The parties shall amend their existing data use agreement to include research activities for prospective linking, validity and EAG program improvement studies based on student-level data that results from the use of any assessments or assessment related instruments developed under the Project.
10. The parties shall have the right to terminate this MOU without cause at any time during the term by giving sixty (60) days notice in writing. Termination of this MOU will not affect WY DOE's current agreement with WCER. However, WY DOE will not be able to remain in the WIDA Consortium at the end of the Project period if it does not adopt or use any instrument, including to the extent applicable, assessments developed under the Project.
11. WIDA Consortium members shall make the operational and policy decisions necessary to fulfill the Project and EAG program requirements according to the Project narrative.
12. WCER shall comply with all federal and state laws.

This memorandum of understanding will become effective once WY DOE and WCER both sign it. The date of this memorandum of understanding shall be the date on which it is signed by the last party to sign it.

For WY DOE

(b)(6)

Name *Leader*
 Title
 Wyoming Department of Education

5-26-11
 Date

For WCER

(b)(6)

Don Miner
 Assistant Vice-Chancellor
 University of Wisconsin-Madison

5-27-11
 Date

(b)(6)

Tim Boals, Ph.D.
 Executive Director - WIDA Consortium
 Wisconsin Center for Education Research (WCER)

5-27-11
 Date

Assurance Regarding Management Partner

Directions: In the box below identify the proposed project “management partner”. Check the box to provide the assurance.

Consortium’s proposed project “management partner”:

Check the box:



The applicant assures that the proposed project management partner is not partnered with other eligible applicants.

[Optional: Enter additional information]

The Wisconsin Center for Education Research (WCER) is pleased to be included as the management partner for Assessment Services Supporting ELs through Technology Systems (ASSETS), an Enhanced Assessment Grant proposal. As the management partner of the ASSETS project, WIDA staff at WCER will coordinate, and in some cases direct, the efforts of all entities, including ASSETS consortium activities and subcontracts. In addition WCER will spearhead professional development, and engage in research related to the project. WCER is not partnering with any other eligible applicants for EAG program CFDA Number 84.368

NOTE: You must upload any narrative sections and all other attachments to your application, including the Assurance Regarding "Management Partner," as files in a .PDF (Portable Document) format only. You must print, complete, and save in .PDF format the Assurance Regarding "Management Partner," for your application before uploading this attachment to your application.

**INDIRECT COST RATE AGREEMENT
STATE AGENCY**

ORGANIZATION:

Wisconsin Department of Public Instruction
125 South Webster Street
Madison, Wisconsin 53703

EIN: 39-6006487

DATE: JUN - 2 2010

AGREEMENT NO. 2010-061

FILING REFERENCE: This replaces previous
Agreement No. 2009-074
dated: March 16, 2009

The purpose of this Agreement is to establish indirect cost rates for use in awarding and managing of Federal contracts, grants, and other assistance arrangements to which Office of Management and Budget (OMB) Circular A-87 applies. This agreement is issued by the US Department of Education pursuant to the authority cited in Attachment A of OMB Circular A-87.

This Agreement consists of four parts: Section I - Rates and Bases; Section II - Particulars; Section III - Special Remarks; and, Section IV -Approvals.

Section I - Rate(s) and Base(s)

TYPE	Effective Period		Rate	Base	Coverage	
	From	To			Location	Applicability
Fixed	07-01-10	06-30-11	11.7%	<u>1/</u>	All	<u>2/</u>
Fixed	07-01-10	06-30-11	5.6%	<u>1/</u>	All	<u>3/</u>

1/ Total direct costs less items of equipment, alterations and renovations, pass-through funds, and subaward expenditures in excess of \$25,000 per subaward.

2/ All Federal programs which do not require the use of a restricted rate per 34 CFR 75.563.

3/ All Federal programs which require the use of a restricted rate per 34 CFR 75.563.

Treatment of Fringe Benefits: Fringe Benefits applicable to direct salaries and wages are treated as direct costs.

Capitalization Policy: Items of equipment are capitalized and depreciated if the initial acquisition cost is in excess of \$5,000.

Section II - Particulars

SCOPE: The indirect cost rate(s) contained herein are for use with grants, contracts, and other financial assistance agreements awarded by the Federal Government to the Organization and subject to OMB Circular A-87.

LIMITATIONS: Application of the rate(s) contained in this Agreement is subject to all statutory or administrative limitations on the use of funds, and payment of costs hereunder are subject to the availability of appropriations applicable to a given grant or contract. Acceptance of the rate(s) agreed to herein is predicated on the conditions: (A) that no costs other than those incurred by the Organization, were included in the indirect cost pools as finally accepted, and that such costs are legal obligations of the Organization and allowable under the governing cost principles; (B) that the same costs that have been treated as indirect costs are not claimed as direct costs; (C) that similar types of information which are provided by the Organization, and which were used as a basis for acceptance of rates agreed to herein, are not subsequently found to be materially incomplete or inaccurate; and (D) that similar types of costs have been accorded consistent accounting treatment.

ACCOUNTING CHANGES: Fixed or predetermined rates contained in this Agreement are based on the accounting system in effect at the time the Agreement was negotiated. When changes to the method of accounting for cost affect the amount of reimbursement resulting from the use of these rates, the changes will require the prior approval of the authorized representative of the cognizant negotiation agency. Such changes include, but are not limited to, changing a particular type of cost from an indirect to a direct charge. Failure to obtain such approval may result in subsequent cost disallowances.

FIXED RATE: The negotiated rate is based on an estimate of the costs which will be incurred during the period to which the rate applies. When the actual costs for such period have been determined, an adjustment will be made in a subsequent negotiation to compensate for the difference between the cost used to establish the fixed rate and the actual costs.

NOTIFICATION TO OTHER FEDERAL AGENCIES: Copies of this document may be provided to other Federal agencies as a means of notifying them of the agreement contained herein.

AUDIT: If a rate in this Agreement contains amounts from a cost allocation plan, future audit adjustments which affect this cost allocation plan will be compensated for during the rate approval process of a subsequent year.

Section III - Special Remarks

1. This Agreement is effective on the date of approval by the Federal Government.
2. Questions regarding this Agreement should be directed to the Negotiator.
3. Approval of the rate(s) contained herein does not establish acceptance of the Organization's total methodology for the computation of indirect cost rates for years other than the year(s) herein cited.
4. Federal programs currently reimbursing indirect costs to this Organization by means other than the rate(s) cited in this agreement shall be credited for such costs. The applicable rates cited herein shall be applied to the appropriate base to identify the proper amount of indirect costs allocable to the program(s).

Section IV - Approvals

For the State Agency:

Wisconsin Department of Public Instruction
 125 South Webster Street
 Madison, Wisconsin 53703

(b)(6)

Signature

(b)(6)

Name

Director, Management Services

Title

6-8-2010

Date

For the Federal Government:

US Department of Education
 OCFO/FIPAO/ICG
 550 12th Street, SW
 Washington, DC 20202-4450

Mary Gougisha

Signature

Mary Gougisha

Mary Gougisha

Name

Director, Indirect Cost Group

Title

JUN - 2 2010

Date

Phillip Luster

Negotiator

(202) 245-8069

Telephone

DIRECTOR – OFFICE OF EDUCATIONAL ACCOUNTABILITY **2005 – present**
Wisconsin Department of Public Instruction

- Supervise statewide assessment system for all Wisconsin public schools, including alternate assessments for students with disabilities, and accommodations for English language learners. Oversee staff responsible for test development, test administration, and integration of assessment efforts with curriculum development and school improvement processes.
- Manage state process for determining adequate yearly progress of schools and districts; oversee agency staff responsible for educational statistics and data analysis.
- Serve on Data Management Committee. Work closely with IT staff on the development of a statewide longitudinal data system, selection of a business intelligence tool to assist with data analysis and reporting, and adoption of a state student information management system.
- Manage department long-range planning and annual budget of \$20.

ASSISTANT DIRECTOR – TITLE 1: SCHOOL SUPPORT **2003 – 2005**
Wisconsin Department of Public Instruction

- Managed state process for determining adequate yearly progress of schools and districts.
- Coordinated development of statewide system of support for schools identified for improvement.
- Oversight of state class size reduction program and comprehensive school reform program.

DIRECTOR – STAFF AND ORGANIZATION DEVELOPMENT
Madison Metropolitan School District, Madison, WI **1998 – 2003**

- Managed the district school improvement process for 47 schools.
- Supervised the Instructional Technology Department, developed district technology integration plan.

UNIVERSITY INSTRUCTOR
Cardinal Stritch University – Madison Center, Madison, WI **2000 – 2004**

- Taught School Administration Courses: School Improvement, Systemic Change, Human Resources.

Herzing University – Madison Center, Madison, WI **2002 – 2003**

- Taught Business Principles Courses: Business Planning, Organizational Improvement.

Upper Iowa University – Madison Center, Madison, WI **1998 – 2002**

- Taught Business Leadership Courses: Organizational Culture and Climate, Organizational Development, Theories of Management in Organizations, and Research Process and Design.

K-12 DIRECTOR OF CURRICULUM & INSTRUCTION
Baraboo School District, Baraboo, WI **1996-1998**

- Successfully authored and coordinated implementation of technology integration grant to help educators integrate technology with instructional practices.
- Provided oversight for district assessment, data analysis and use of results, and cross-grade curricular planning.

PreK-8 PRINCIPAL
Coloma Elementary School, Westfield School District, Westfield, WI **1995-1996**

- Early implementer of technology initiatives in elementary classroom instruction.
- District-level oversight of curriculum, assessment, and technology integration.

K-12 EDUCATIONAL EXCELLENCE COORDINATOR

Poynette School District, Poynette, WI

1994-1995

- Coordinated student enrichment opportunities to expand curricular options.
- Provided professional development to help educators differentiate instruction for varied learners.

K-12 GIFTED & TALENTED PROGRAM COORDINATOR

Adams-Friendship Area School District, Adams, WI

1990-1994

- Assisted classroom teachers with curriculum modifications for students working beyond grade level.
- Coordinated district initiatives to encourage student creativity and problem solving.

EDUCATION

Ph. D., Educational Administration, UW-MADISON, Madison, WI

Principal and Director of Instruction Licensing Program, EDGEWOOD COLLEGE, Madison, WI

M. S. Ed., Curriculum and Instruction, UW-STEVENSON POINT, Stevens Point, WI

B. S. Ed., Elementary Education, UW-SUPERIOR, Superior, WI

B. S. Ed., K-12 Art Education, NORTHERN ILL. UNIVERSITY, DeKalb, IL

Six Credits earned 2009-10: E-Learning for Educators, and Assessment in E-Learning, UW-STOUT

Wisconsin Administrative Credentials: Superintendent, K-12 Director of Instruction, K-12 Principal

Wisconsin Teaching Credentials: 1-6 Elementary Education, K-12 Art Education

Philip S. Olsen
Assistant Director, Office of Educational Accountability
Wisconsin Department of Public Instruction

(b)(6)

Professional Profile

Test Development. Major duties include supervising development of the alternate assessment for students with disabilities and translation accommodations for English language learners on the state assessment.

Statistical Analysis. Work with agency analysts to calculate Adequate Yearly Progress, Annual Measurable Achievement Objectives, Blue Ribbon Schools, and Wisconsin Schools of Recognition.

Management. Member of World-Class Instructional Design and Assessment (WIDA) Consortium executive board and Wisconsin Information Network for Successful Schools (WINSS) steering committee; agency representative for Cooperative Educational Service Agency – School Improvement Services; and supervisor of Office of Educational Accountability participation in development of a Longitudinal Data System grant and growth model evaluation study.

Education

Master of Arts – Teaching. School for International Training, Brattleboro, Vt., 2000. Completed thesis on using feedback from English language learners to improve teaching and learning.

Bachelor of Science. University of Wisconsin – Madison, Madison, WI, 1985. Majored in Journalism, English, and Philosophy.

Employment History

Assessment Consultant. Wisconsin Department of Public Instruction, Madison, WI.

English Instructor. Aomori Public College, Aomori, Japan.

Principal Instructor. James English School, Aomori, Japan.

English Instructor. Riverside Language Program, New York, NY.

WISCONSIN CENTER FOR EDUCATION RESEARCH

Facilities, Equipment, and Other Resources

The **Wisconsin Center for Education Research (WCER)** is one of the nation's oldest and most highly esteemed university-based education research and development centers. A part of the University of Wisconsin–Madison's School of Education, WCER provides a productive environment where scholars conduct basic and applied education research and development.

WCER research spans the full scope of education, from elementary education to undergraduate and graduate curriculum reform. Much of the work focuses on the teaching, learning, and assessment of today's increasingly diverse K–12 students. WCER is home to centers for research on the improvement of mathematics and science education from kindergarten through postsecondary levels, the strategic management of human capital in public education, and value-added achievement, as well as the Minority Student Achievement Network, a multistate collaborative project to develop assessments for English language learners, and Wisconsin's Equity and Inclusion Laboratory. Other WCER projects focus on leadership, special education, teacher professional development, social capital and children's development, and education technology, among other topics. WCER also hosts two training programs, one for social science doctoral students conducting research on a broad range of education topics and the other for postdoctoral fellows conducting research on mathematics education. Although most of WCER's research has a national focus, attention to local and global contexts is also found in the center's portfolio.

A commitment to disseminating research findings and research-based educational interventions and products has characterized WCER from its inception. WCER researchers have worked collaboratively with educators from Wisconsin and around the nation to develop and implement a wide range of innovations in curriculum, instruction, and assessment. For example, WCER is home to ACCESS for ELLs®, a standards-based assessment of English language proficiency for schoolchildren that is used throughout the nation. Another example is Mathematics in Context (MiC), a comprehensive mathematics curriculum for Grades 5–8 that is used by schools across the U.S.

WCER combines the talents of scholars from many disciplines to focus on the problems of learning, teaching, assessment, and policy in today's education systems. The University of Wisconsin–Madison has a strong tradition of scholars' joining together across disciplines to work on significant research problems. It is no surprise, then, that WCER researchers come from such diverse backgrounds as astronomy, biology, economics, engineering, law, mathematics, psychology, and sociology, as well as from most areas of specialization within the UW–Madison School of Education. WCER employs more than 100 graduate students in these varied fields who participate in the work of the center while they gain research training and often opportunities to publish collaboratively with senior researchers.

WCER projects are funded by a variety of government agencies, including the Institute of Education Sciences and the Office of Special Education and Rehabilitative Services at the U.S. Department of Education, the National Science Foundation, and the National Institutes of Health,

as well as by a number of private foundations and other organizations. WCER's outside funding exceeds \$40 million annually.

Adam Gamoran, WCER's director, is John D. MacArthur Professor of Sociology and Educational Policy Studies and former chair of the UW–Madison Department of Sociology. His research interests include school organization, stratification and inequality in education, and resource allocation in school systems. He is an elected member of the National Academy of Education and was appointed by President Obama to serve as a member of the National Board for Education Sciences. He also serves on the National Research Council's Board on Science Education, and he chairs the Independent Advisory Panel of the National Assessment of Career and Technical Education for the U.S. Department of Education.

WCER offers services in three areas: business and other grant administration services; technical services; and communication and dissemination services. The annual budget for these services is approximately \$3.2 million, about 90% of which is generated through external grants.

WCER's Business Office provides projects with budgeting, forecasting, accounting and financial management, and human resource management. The Director's Office provides non-budgetary grant administration services, a grant notification service, and guidance on human subjects compliance. WCER offers copy and mail services at cost.

The WCER Technical Services Department provides multimedia services, custom software development, and computer support for more than 350 networked computer systems. Data warehousing and network operations are supported by more than 25 servers, including an active-active cluster of two data warehouse servers running Enterprise MS-SQL 2005 on a Windows 2003 Advanced Server. Technical Services supports multiple graphics and video workstations that facilitate the integration of computer and multimedia technologies, including videoconferencing, teleconferencing, video projection, large-format color printing, and all major video and audio formats. In addition, the department includes a state-of-the-art multimedia studio staffed by multimedia artists, animators, and programmers. Technologies available to projects include broadcast quality HD digital video editing systems, industry standard video encoders, and CD-ROM and DVD authoring tools, as well as professional video and audio recording hardware.

The Technical Services Department also supports a number of collaborative technologies, including large-scale, toll-free teleconferencing; point-to-point video conferencing; and web-based desktop sharing tools. In support of collaborative research, WCER has deployed an enterprise-level web-based collaborative environment to facilitate distributed work and data sharing across complex partnerships. This environment is backed up by a relational database for tracking and reporting project activities and project outputs and monitoring project status.

In the area of communication and dissemination services, a professional editor provides pre-award editorial support and disseminates research through a working paper series (<http://www.wcer.wisc.edu/publications/workingPapers/index.php>). A public information specialist further disseminates research findings through a variety of print and electronic media, including the WCER website (www.wcer.wisc.edu/), a quarterly newsletter (*WCER Research Highlights*), a monthly electronic newsletter (*WCER Today*), podcasts, the university news

service, and the national media. Services of the Education Outreach and Partnerships Office within the UW–Madison School of Education are also available to WCER, offering support for collaboration with and dissemination of research to PK–12 Wisconsin schools.

WCER occupies eight floors of the 13-story Educational Sciences Building, a facility built with matching state and federal funds and dedicated to education research and development. The building offers a variety of conference rooms that are flexibly furnished and can be arranged for formal presentations, roundtable sessions, or small group work. All rooms are equipped for audio and video presentations and for teleconferencing and videoconferencing.

WCER is based in the UW–Madison School of Education, which is consistently ranked one of the top schools of education in the country. *U.S. News & World Report*, in the 2012 edition of its guide to the best graduate schools of education, ranked the UW–Madison School of Education 9th in the nation; in the specialty rankings, the School of Education came in 1st in curriculum and instruction, educational psychology, and rehabilitation counseling; 2nd in administration/supervision and elementary education; 3rd in secondary education; 4th in education policy; 6th in counseling/personnel services; and 11th in special education.

The University of Wisconsin–Madison is recognized throughout the world as one of the great U.S. universities. Founded in 1848, UW–Madison is the flagship campus of the University of Wisconsin System and the original 1862 land grant university in Wisconsin. It continues to be Wisconsin’s comprehensive teaching and research university with a statewide, national, and international mission. The university’s academic reputation has been rated among the top 10 in the country in many areas of study since the beginning of the last century. *U.S. News & World Report* currently ranks UW–Madison 13th among U.S. public universities. According to current figures from the National Science Foundation, UW–Madison ranks 3rd in annual research expenditures in science and engineering and 5th in expenditures outside science. Total UW–Madison funding from federal, state, and private sources currently exceeds \$1 billion.

In every sense, the University of Wisconsin–Madison is a public university. Active in the dissemination of knowledge, the university is guided by the “Wisconsin Idea,” which holds that education should influence and improve people’s lives beyond the university classroom. The university’s longstanding partnership with Wisconsin and its citizens is an integral component of its mission to create, integrate, transfer, and apply knowledge. Also central to the university’s mission is a commitment to achieve diversity in its faculty, students, and staff and to be responsive to groups that have traditionally been underserved by higher education.

TIMOTHY JAY BOALS, PhD

WIDA Consortium
Wisconsin Center for Education Research
University of Wisconsin – Madison
1025 W. Johnson Street, MD #23
Madison, WI 53706

tjboals@wisc.edu
608.263.4326
www.wida.us

Education

Ph.D., Major: Curriculum; Minor: Educational Policy
University of Wisconsin, Madison, WI
Dissertation topic related to classroom assessment of English language learners.

M.A., Spanish Language and Literature
University of Virginia, Charlottesville, VA

B.A., Major: Modern Languages; Minor: International Business
Wabash College, Crawfordsville, IN

Non- Degree
Ph.D. Level Coursework in Language Education, Indiana University, Bloomington, IN
Course of Studies, University of Valencia and University of Madrid, Spain

Current Professional Activities

Associate Research Scientist at WCER

Executive Director and Project Investigator

WIDA Project at the University of Wisconsin, Madison, WI

2006–Present

Responsible for overseeing the vision, mission, long range planning, research and operations at WIDA. Under my direction, WIDA has grown from three states in 2003 to 25 states with annual revenues exceeding 25 million dollars. One million English language learners and their educators are impacted by the standards, assessments, professional development, materials development and research efforts of the WIDA Consortium. Spearheading the initiative to launch WCEPS, Wisconsin Center for Education Products and Services, a non-profit organization that will manage non patentable intellectual property and market educational products and services targeting disadvantaged student groups. Project investigator for ONPAR, LADDER and SALSA development grants. Involved with submissions to IES, Spencer, Carnegie, AERA and two new federal grants under Title I (Enhanced Assessment Grants) and Title III (National Professional Development) for submission in May 2011. Current research and writing projects include Academic English Language Interactions Study (pilot this spring in Middleton Schools), Spanish Expressive Language Study, Madison Academic Language Working Group (MALWG) producing an edited volume on the role of academic language in schools, article on policy implications of language growth trajectory data for the Kappan (submission due August 2011), WIDA Focus On Academic Language publication (Spring 2011), two articles on testing accommodations policy (submission summer 2011), and a teacher resource text on formative language assessment (Heinemann Publishers, 2012). Research interests include the interplay between content and language learning for English language learners across the language acquisition continuum.

Past Professional Experience

WIDA Project Director

Office of Educational Accountability, Department of Public Instruction

2003–2005

Responsible for overseeing the development and enhancement of the WIDA Standards and Assessment system for English language learners across the consortium. Duties included: Chair and coordinate the WIDA Steering Committee; act as principal liaison to the state educational agencies including memoranda of understanding and contracts with states; direct operations including management of subcontracts, on-line and on-site professional development, validation; present at national conferences, US ED Institutes, WIDA state and regional conferences and institutes.

State Consultant

Bilingual/ESL Programs, Wisconsin Department of Public Instruction

1997–2003

Responsible for coordinating and evaluating 38 state-funded bilingual/ESL programs serving predominately Hmong and Spanish speaking students. Advisory role to the State Superintendent of Public Instruction regarding curriculum, instruction and assessment of English Language Learners (ELLs) in Wisconsin. Principal coordinator of Wisconsin's Alternate Assessment for English Language Learners.

Indiana SEA Title VII Coordinator

Indiana Department of Education,

Division of Language Minority and Migrant Programs, Indianapolis, IN

1990–1997

Responsible for coordinating and developing bilingual and English as a second language programs at the State level. Position also involved training teachers and administrators in effective practices for limited English proficient students and the successful coordination and integration of all special programs school-wide.

Publications – Author

Albers, C., Kenyon, D., and Boals, T. (2009). Measures for Determining English Language Proficiency and the Resulting Implications for Instructional Provision and Intervention. *Assessment for Effective Intervention*. 34 (2).

Cook, H.G., Boals, T., Wilmes, C., Santos, M. (2008). Issues in the Development of Annual Measurable Achievement Objectives (AMAOs) for WIDA Consortium States. WCER Working Paper Series.

Bauman, J., Boals, T., Cranley, E., Gottlieb, M., and Kenyon, D. (2007). Assessing Comprehension and Communication in English State to State for English Language Learners (ACCESS for ELLs®). *English Language Proficiency Assessment in the Nation: Current Status and Future Practice* (Chap. 6). In Jamal Abedi (Ed.), UC Davis, School of Education.

Boals, T.J., & Gottlieb, M. (2005). On the Road to “MECCA”: Assessing Content-Based Instruction Within a Standards Framework. *Content-Based Instruction in Primary and Secondary School Settings* (Chap. 11). In D. Kaufman & J. Crandall (Ed.), TESOL publications.

Boals, T. J. (2002). Best Practice Considerations When Serving Limited English Proficient Students in K-12 Public Schools. *Information Update Series*, Wisconsin Department of Public Instruction. (Available at www.dpi.wi.gov/ell/servingells.html)

Boals, T. J. (2002). Legal Responsibilities When Serving Limited-English Proficient (LEP) Students in K-12 Public Schools. *Information Update Series*, Wisconsin Department of Public Instruction. (Available at www.dpi.wi.gov/ell/servingells.html)

Boals, T. J. (2001). Ensuring Academic Success: The Real Issue in Educating English Language Learners. *Midwest Educational Research Association*. 14.4 (Fall), 3-8.

Boals, T. J. (2000). Wisconsin's Approach to the Academic Assessment of Limited English Proficient Students. *MinneWITESOL Journal*, 17.

Publications – Directed and/or Edited

Boals, T. J. (Ed.). (2004, 2007, 2011). *WIDA Consortium English Language Proficiency Standards for English Language Learners in Kindergarten through Grade 12*. State of Wisconsin. (These standards have undergone an augmentation process by Teachers of English to Speakers of Other Languages (TESOL) and now provide the national K- 12 ESL model standards. WIDA has issued a new 2007 edition. I am actively involved in the development of a new “standards amplification” project for publication in Fall 2011. The new model performance indicators will be aligned to the Common Core State Standards and include new features to enhance teacher understanding of their classroom use.)

Boals, T. J. (Ed.). (2003). *Linguistically, Culturally Diverse II: American Indian & Spanish Speaking. Language Sample Analysis Companion Guide*. State of Wisconsin.

Professional Contributions

- Director of development and implementation for a standards-based English proficiency test system that has grown from three to 25 member states. Project funded from a 2.3 million dollar grant offered through the US ED, Title I Office. The consortium now reaches the teachers of one million English language learners with improved standards, assessments, professional development, materials resources and research.
- US Department of Education Expert Panelist, Public Hearings on Consortium Development, Spring 2010, Washington, DC.
- US Department of Education Expert Panelist, Public Hearings on the ELL Partnership for Better Standards and Assessments, July 26, 2007, Washington, DC.
- Internal Assessment Committee member at DPI. Responsible for state policy issues regarding accountability for and assessment of English language learners under the federal No Child Left Behind Act. 2004 – 2005.
- Member of the advisory committee on large-scale assessment policies, Center for Equity and Excellence in Education (CEEE), George Washington University, Washington, DC, January 25, 2001 meeting with follow-up during Spring 2001.
- Member of the advisory board to the *Expected Gains Study*, a national longitudinal study of effective practice for English language learners commissioned by the U.S. Department of Education in 1999.
- Member of the American Institutes of Research (AIR) taskforce for language review of test questions for the proposed national examination of student progress at fourth and eighth grades. (Washington D.C., 1999)
- Chair of the State Taskforce on Alternate Assessment and Accommodations for Bilingual and Special Education Students. Coordinated the development of Wisconsin's *Alternate Performance Indicators* (APIs) and their alignment with state academic standards. Supervised the development and publication of teacher guidebooks and staff development in accommodations, alternate assessment and use of the APIs, 1997-1999.

Selected Presentations

- Boals, T.J. (2011) *WIDA's System for Standards and Assessments for English Learners*. Minnesota ESL and Migrant Education Conference, Saint Paul, MN., April 14, 2011.
- Boals, T.J. (2010) *Future Directions for Alignment Policy*, CCSSO National Assessment Conference, June 20 – 23, 2010.
- Boals, T.J. (2009) *English Language Learning Progressions*, Teachers of English to Speakers of Other Languages (TESOL) Annual Conference, March 17.
- Boals, T.J. (2008) *Academic Language: New Insights, New Tools to Inform Practice*. Keynote speaker at 2008 OABE/OKTESOL Joint Conference, October 4, 2008, Edmond, OK
- Boals, T.J. (2007) *Validity and Reliability of WIDA's Assessment System*. In Jamal Abedi's ELP Assessments Review, special extended session, AERA, April 11, 2007, Chicago, IL.
- Boals, T.J. (2007) Preconference Session on ELP Assessments in the NCLB Era with Jamal Abedi at CCSSO Large-Scale Assessment Conference, June 16, Nashville, TN.
- Boals, T.J. (2006) *The WIDA Bridge Study*. CCSSO Annual Assessment Directors' Meeting. January 23, 2006, San Diego, CA.
- Boals, T.J. (2005) *The WIDA Consortium Standards and Assessments*. State ESL Advisory Group Meeting. January 7, 2005, Hartford, CT.
- Boals, T.J. (2005) *Combining Forces Schoolwide to Ensure the Academic Achievement of ELLs*. Title I National Conference. January 30, 2005, Atlanta, GA.
- Boals, T.J. (2005) *Assessing the Academic Achievement of English Language Learners: The WIDA Consortium Perspective*. Teachers of English to Speakers of Other Languages (TESOL) National Conference. March 31, 2005, San Antonio, TX.
- Boals, T.J. (2005) *NCLB and Standards-Based Instruction and Assessment for ELLs: Wisconsin's Response*. American Educational Research Association National Conference. April 16, 2005, Montreal, Canada.
- Boals, T.J. (2005) *The WIDA Consortium Standards and Assessments*. Council of Chief State School Officers (CCSSO) National Conference on Large-Scale Assessment. June 21, 2005, San Antonio, TX.
- Boals, T.J. (2004) *Assessment, Evaluation, Accountability, and No Child Left Behind*. Panel Discussion at TESOL National Conference. April 2, 2004, Long Beach, CA.
- Boals, T.J. (2004) *Welcome to the WIDA Consortium: A Look at How Assessments for English Language Learners Will Change in New England*. Northeast New England TESOL, keynote presentation, St. Michael's College. April 17, 2004, Burlington, VT.
- Boals, T.J. (2004) *The WIDA Standards in Wisconsin*. Wisconsin Association for Bilingual Education (WIABE), keynote presentation. May 8, 2004, Lake Geneva, WI.

Boals, T.J. (2004) *The WIDA Consortium Standards and Assessments*. Office of English Language Acquisition Annual Title III Summit. October 6, 2004, Washington, DC.

Boals, T.J. (2003) *The WIDA Consortium: An Update and Panel Discussion*. Title III National Summit. December 3, 2003, Washington, D.C.

Selected Workshops

Pierce, L.V., Boals, T.J., and White, P., (2009) *FLARE Secondary Project*. Professional Development Summer Institute with Charlotte-Mecklenburg Public School District. August 5-6, 2009, Charlotte, NC.

Boals, T.J. (2006) *Using the WIDA English Language Proficiency Standards*. National Association for Bilingual Education Annual Conference. January 19, 2006, Phoenix, AZ.

Boals, T.J. (2006) *Best Practices for Meeting the Needs of English Language Learners*. CESA 5 sponsored workshop. April 5, 2006, Wisconsin Dells, WI.

Boals, T.J. (2006) *The WIDA Bridge Study*. American Educational Research Association (AERA) Annual Conference. April 9, 2006, San Francisco, CA.

Boals, T.J. (2006) *A Review of Consortium Standards and Assessments*. CCSSO Annual Conference on Large-Scale Assessment, special pre-conference session with Jamal Abedi. June 24, 2006, San Francisco, CA. Similar session was presented on June 25 during the regular conference, reviewing the work of the WIDA Consortium to-date.

Boals, T.J. (2005) *Meeting the Needs of English Language Learners in the Regular Classroom*. Elkhart Area Schools. February 28 - March 4, and March 21 – 25, 2005, Elkhart, IN.

Professional Affiliations

American Educational Research Association (AERA)
Phi Delta Kappa Professional Fraternity in Education
Association for Supervision and Curriculum Development (ASCD)
National Association for Bilingual Education (NABE) and Wisconsin Affiliate
Teachers of English to Speakers of Other Languages (TESOL) and Wisconsin Affiliate
Phi Sigma Iota National Foreign Language Honor Society

Certifications

Wisconsin Teacher's License:

Secondary Spanish, Bilingual, English as a Second Language (ESL) K-12

Indiana Teacher's License:

Secondary Spanish and Bilingual Endorsement

M. ELIZABETH CRANLEY

WIDA Consortium
Wisconsin Center for Education Research
University of Wisconsin – Madison
1025 W. Johnson Street, MD #23
Madison, WI 53706

mecranley@wisc.edu
608.263.4275
www.wida.us

Education

Ph.D., Social Foundations of Education: Comparative Education
University at Buffalo, Buffalo, NY
Dissertation: An ethnographic study of the moral life of a Thai primary school

M.A., American History
University of Wisconsin, Madison, WI

B.A., History and Government
Saint Mary's College, Notre Dame, IN

Non- Degree, Course of Studies
St. Patrick's College, Maynooth, Ireland

Professional Experience

Associate Director

WIDA Consortium at the University of Wisconsin, Madison, WI

2006 –Present

Responsible for collaborating with the WIDA Consortium director in planning, implementing and directing multifaceted project that includes language standards and test development, creating and providing training and professional development, and planning and conducting research. Other responsibilities include hiring and managing staff, especially in the areas of customer service, test training, professional development, technology, and administrative support; hiring and directing graduate student project assistants; directing and coordinating with the test development team at the Center for Applied Linguistics and with the test vendor, MetriTech, Inc.; Writing grant and conference proposals, Consortium resources, and correspondence; directing research related activities, including Internal Review Board submissions.

ELL Assessment Consultant/WIDA Project Assistant Director

Wisconsin Department of Public Instruction

2003–2005

Responsible for directing and/or coordinating with WIDA member states and with WIDA contractors, especially UW-Oshkosh (technology) and MetriTech, Inc. (test vendor). Wrote grant and conference proposals, requests for proposals, website content, informational memoranda, and assessment guidelines. Edited ELP Standards documents and ACCESS for ELLs™ test materials; Organized and implemented standard setting, bias and content reviews, professional development opportunities, and assessment training. Consulted with Wisconsin educators regarding all aspects of educating ELLs in the school setting, especially assessment. Conducted professional development workshops.

Senior Lecturer
English as a Second Language Program and Intensive English Language Program, University at Buffalo, Buffalo, NY **1999–2003**

Responsible for planning, teaching and assessing undergraduate and graduate English as a second language, credit bearing academic writing courses; planning, teaching and assessing non-credit bearing intensive English language courses in grammar and writing, reading, listening and speaking, and academic skill. ,

Adjunct Professor
Department of Teacher Education, Canisius College, Buffalo, NY, **Spring, 2002**

Responsible for planning, teaching and assessing undergraduate multicultural education course

Research and Teaching Consultant
Faculty of Education, Rajabat Institute, Nakorn Rachasima, Thailand **June–October 1998**

Responsible for consulting with Institute English and Education Department professors regarding ESL methodology, planning and conducting professional development and conducting qualitative research

Graduate Assistant
Department of Educational Leadership and Policy, University at Buffalo, Buffalo, NY
1998–2000

Graduate/Editorial Assistant
Graduate School of Education Dean’s Office, University at Buffalo, Buffalo, NY **1995–1997**

English Teacher
Ito Shogyo Senior High School, Japan **1994–1995**

Staff Assistant
Human Resource Management, Peace Corps, Washington, DC **1994**

Teacher
Lado International Language School, Washington, DC **1994**

Research Assistant
Citizen’s Democracy Corps, Washington, DC **199–1994**

English as a Foreign Language Teacher
Kongphai Wittiya Junior High School and Nakorn Sawan Teachers College, Peace Corps, Thailand
1989–1991

Research Assistant
Iconography Archives, Wisconsin State Historical Society **1986–1989**

Publications

- Cranley, M. E., Pinpradit, N., Sintoovongse, K. (2001). Beyond Materialism. In Cummings, Totto and Hawkins (Eds.). *Values Education for Dynamic Societies: Individualism or Collectivism*. Hong Kong: Comparative Education Research Centre, The University of Hong Kong.
- Choi, S., Cranley, M. E., Nichols, J. D. (2001). Coming to America and Becoming American: Narration of Korean Immigrant Young Men. *International Education Journal*, 2 (5), 47-60.
<http://iej.cjb.net>.
- Choi, S., Huang, S. H. and Cranley, M. E. (2000). [Review of the book *Across the Taiwan Strait: Exchanges, conflicts, and negotiations*]. *American Journal of Chinese Studies*, 7 (1) 119-122.
- Cranley, M. E., Pinpradit, N., Sintoovongse, K. (1999-2000). Redefining Thai values in the age of consumerism. *Thresholds in Education*, 25-26 (4 & 1).
- Cranley, M. E. (1998). *HELP: Handbook for educational leadership and policy international students*. Department of Educational Leadership and Policy, University at Buffalo. (Second edition forthcoming).

Presentations

- Cranley, M. E. (2005). *WIDA: Building Assessments for English Language Learners*. International Association of Applied Linguistics (AILA). July 24-29, 2005.
- Cranley, M. E. (2005). *Assessing English language learners for academic English proficiency: A standards-based approach*. AERA Annual Conference. Montreal, April 11-15, 2005.
- Cranley, M. E. (2005). *Assessing the achievement of English language learners: The Wisconsin perspective*. NABE Annual Conference. San Antonio, TX, January 19-22, 2005.
- Cranley, M. E. (2005). *English proficiency testing and Title III: A report on state initiatives—the WIDA Consortium*. National Association of Bilingual Education Annual Conference. San Antonio, TX, January 19-22, 2005.
- Cranley, M. E. (2005). *Using ELL assessments for deaf and hard of hearing students*. Deaf and hard of hearing educators' state-wide meeting. Wisconsin Dells, WI, March 9, 2005.
- Cranley, M. E. (2004). *Serving English language learners: Best practices*. Superintendents meeting. Manitowoc, WI, December 1, 2004.
- Cranley, M. E. (2004). *The future of assessments for ELLs in Wisconsin*. Address to Appleton educators. Appleton, WI, February 20, 2004.
- Cranley, M. E. (2004). *Small states, Big ideas*. NABE. Albuquerque, NM, February 4-8, 2004.
- Cranley, M. E. (2002). *Teachers must teach and students must pass: practical policies that practically fail*. CIES Northwest Regional Meeting. Pittsburgh, PA, October 30-November 2, 2002.
- Cranley, M. E. (2001). *Plotting (plodding) along the dissertation curve*. Graduate School of Education

Research Symposium. University at Buffalo, NY, March 31, 2001.

Cranley, M. E. (2001). *So you're in grad school now*. Graduate Workshop: Institute of Research on Women and Gender. University at Buffalo, NY, March 28, 2001.

Cranley, M. E. (2001). *Becoming Thai*. Dissertation Workshop: CIES Annual Meeting. Washington, DC, March 14-17, 2001.

Cranley, M. E. (2000). *Not-learning in a Thai primary school*. CIES Annual Conference. San Antonio, TX, March, 2000.

Cranley, M. E. (1999). *The other side of schooling—sociomoral life in Thai primary schools*. CIES Annual Conference. Toronto, Canada, April 14-18, 1999.

Cranley, M. E. (1999). *Values education in Thailand—Sigma Elite Survey final report*. CIES Annual Conference. Toronto, Canada, April 14-18, 1999.

Cranley, M. E. (1998). *Values in the context of economic crisis—Thailand*. Graduate School of Education Research Symposium. Buffalo, NY, April 4, 1998.

Cranley, M. E. (1998). *Values education in Thailand—Sigma Elite Survey preliminary findings*. CIES Annual Conference. Buffalo, NY, March 18-22, 1998.

Cranley, M. E. (1997). *Minority responses to dominant culture curriculum*. Comparative and International Education Society (CIES) Annual Conference. Mexico City, March 19-23, 1997.

Workshops

Cranley, M. E. (2005). *ACCESS for ELLs Train the Trainers*. Portland, ME, August 22-23, 2005.

Cranley, M. E. (2005). *Using the WIDA ELP standards*. CESA 5 Summer Institute, Wisconsin Dells, WI, July 29, 2005.

Cranley, M. E. (2005, 2004). *Introducing the WIDA ELP Standards*. Madison, WI, June 14, 2005; Dover, DE, October 8, 2004.

Cranley, M. E. (2004). *Assessing the English language proficiency and academic achievement of English language learners*. Wisconsin Dells, WI, September 21, 2004; Madison, WI, October 20, 2004.

Professional Affiliations

National Association for Bilingual Education (NABE)
Teachers of English to Speakers of Other Languages (TESOL) and Wisconsin Affiliate
International Reading Association (IRA)
National Staff Development Council (NSDC)

Funded Research

Values Education in the Pacific Rim—Sigma Elite Survey, Thailand team leader

(Dr. Williams Cummings, principal investigator), 1997-99.

Teacher perceptions and practice in values education in Thailand, (Dr. Wasana Kangvalert and Jirapa Nacksompong, co-investigators), 30,000 baht, Rajapat Institute, Nakorn Rachisima, Thailand, 1998-99.

Dissertation research, \$990, Mark Diamond Fund of the Graduate Student Association, University at Buffalo, 1998-99.

Awards, Honors

CIES New Scholar/Doctoral Candidate Award, 2001
Qualifying Exams, passed with honors, 1998
Blecker History Award, Saint Mary's College, 1986
Advanced Writing Award, Saint Mary's College, 1986
Cum Laude, Saint Mary's College, 1986

CURRICULUM VITA

Margo Gottlieb

(b)(6)

(b)(6)

UNIVERSITY EDUCATION

- 1985 Ph.D., Public Policy Analysis, Evaluation Research and Program Design
University of Illinois at Chicago
- 1978 Chicago Certificate of Administration and Supervision, National College of Education
- 1974 M. A., Applied Linguistics, Northeastern Illinois University, Chicago
- 1969 B. A., Teaching of Spanish, High Honors, University of Illinois, Urbana-Champaign &
CIC Scholarship: La Universidad Iberoamericana, Mexico City

TEACHER TRAINING- INTERNATIONAL EXPERIENCE

- 2010- Advisor to Pacific Resources for Education and Learning including Training of Trainers
or American Samoa Department of Education
- 2009 Invited featured speaker by Teachers of English to Speakers of Other Languages at the
ELT Standards Symposium and the Panama Congress, Panama City, Panama
- 2008/7 Invited by the University of Guam, Micronesian Language Institute, as a Visiting
Professor, Mangilao
- 2006 Conducted professional development, Shanghai American School, Shanghai, China
- 2006 Invited by the Commissioner of Education, Commonwealth of the Northern Mariana
Islands (CNMI), to conduct professional development, Saipan
- 2005 Invited plenary speaker, Current Trends in English Language Testing Conference, and
speaker to education faculty at College Dubai Men's College, Higher Colleges of
Technology, Dubai, United Arab Emirates
- 2004 Fulbright, Senior Specialist in Assessment and Evaluation
Provided technical assistance and professional development for DUOC and the Ministry
of Education in Santiago, Viña del Mar, and Concepción, Chile
- 2004 Evaluator of Play English and the Bilingual School of Monza, Monza, Italy

SPECIAL RECOGNITION

- 2008 Member, U.S. Department of Education, Inaugural National Technical Advisory Council
(NTAC), appointed by U.S. Secretary of Education Margaret Spellings
- 2004 Fulbright Senior Specialist in Assessment and Evaluation, Santiago, Chile

WORK EXPERIENCE

- 2002- **Lead Developer, World-Class Instructional Design and Assessment (WIDA) Consortium**, Wisconsin Center for Education Research, Univ. of Wisconsin, Madison
- 1994- **Director, Assessment and Evaluation, Illinois Resource Center** Arlington Heights, IL
- 1987- **Adjunct faculty**, National Louis University Evanston, IL; Consultant, Illinois Resource Center

SELECT INVITED PRESENTATIONS FOR UNIVERSITIES AND ORGANIZATIONS

- 2011 **Washington Association for Bilingual Education** Conference, Kennewick, WA, Keynote speaker
- Culture and Equity Leadership Academy**, Denver CO, Keynote speaker
- 2010 **Educational Testing Service**, Princeton, NJ
- Colorado TESOL** Denver, CO Keynote speaker
- 2009 **Emporia State University**, Emporia KS, Keynote speaker for KATESOL
- 2008 **A & M University**, Commerce, TX, Visiting Scholar for Project Listo: Sharp and Ready
- N. Texas Federation of Early Childhood Fall Symposium**, Dallas, TX, Keynote speaker
- MetroRESA** Smyrna, GA Speaker to regional Directors of Professional Development
- 2007 **Georgia State University** Athens; Presenter at the CLASE Summer Institute
- National Staff Development Council** Conference, Dallas, TX
- National Association of Elementary School Principals**, Seattle, WA
- New Jersey TESOL/ New Jersey BE Spring Conference**, , Somerset, NJ, Keynote speaker and honoree
- 2006 **Colorado Association for Bilingual Education**, Aurora, CO Keynote speaker
- Iowa Culture and Language Conference**, Des Moines, IA Keynote speaker
- 2005 **Wisconsin TESOL Conference**, WI Dells, Keynote speaker
- Northern New England TESOL Conference**, Biddeford, ME, Keynote speaker

2004 **Midwest TESOL Conference**, Independence, MO Keynote speaker

Sanibel Leadership Association, Sanibel, FL

SELECT PRESENTATIONS AT NATIONAL CONFERENCES

American Association of Applied Linguistics

2009 *The Contribution of Standards to Assessment and Language Education Policy*
Denver, CO

American Educational Research Association Annual Meeting

2011 *Operationalizing Academic Language in Language Development Standards* New Orleans, LA

2007 *A Systemic Approach to Assessment and Accountability of English Language Learners*
Chicago, IL

2006 *Validation of English Language Proficiency Standards as a Precursor to Test Construction* San Francisco, CA

2005 *Defining Academic Language Proficiency: Putting Theory into Practice* Montreal, Canada

2003 *Using Longitudinal Data to Inform and Enhance Dual Language Program Development*
(with Diep Nguyen) Chicago, IL

Association of Language Testers of Europe (ALTE)

2008 Third International Conference Cambridge, UK Keynote Address
Application of Language Assessment to Teaching and Learning Across Continents: Validation of 'Can Do' Descriptors (with N. Jones)

International Symposium on Bilingualism

2003 *Developmental Bilingual Education in the Real World: Using Longitudinal Data to Enhance Dual Language Program Development* (with D. Nguyen) Tempe, AZ

National Association for Bilingual Education (NABE)

2007 *Transforming your Classroom to Meet the Needs of English Language Learners*
San Jose, CA

2006 *Standards-based, Ongoing Classroom Assessment for English Language Learners to Inform Differentiated Instruction*

2004 *Small States, Big Ideas: Enhancing the Assessment of English Language Learners*, Albuquerque, NM

2002 *Language Policy and Standardized Testing*, Invited speaker to Language Policy Special Interest Group, Philadelphia, PA

2001 *Designing and Implementing Performance-based Assessment for English Language Learners*, Phoenix, AZ

National Student Assessment Conference

2007 *English Language Proficiency Assessment and Accountability Under NCLB Title III: Addressing Technical and Policy Challenges: Determining and Tacking Research Priorities* Nashville, TN

2006 *The Technical Qualities of a New English Language Proficiency Test: Examining the Construct of Validity*, San Francisco, CA

2002 *English Language Learners in the Crossfire of Accountability: Using Longitudinal Data from Language Proficiency Tools* (with R. Balu and R. Allen) Palm Desert, CA

Office of Head Start National Dual Language Institute

2008 *What dual language learners CAN DO!* Washington, D.C.

Pacific Educational Conference

2005 *Strategies for Acquiring Academic Language for Academic Success!* Honolulu, HI

Teachers of English to Speakers of Other Languages (TESOL)

2010 Invited luminary speaker for K-12 Day, Boston, MA

2009 *Easy Steps for Benchmarking English Language Proficiency*, Denver, CO

2008 TESOL's English Language Proficiency Standards Come Alive! (Board sponsored session with PreK-12 Standards Committee), New York, NY

2005 Invited speaker, Bilingual Education/TEDS Interest Section Academic Session, San Antonio TX

2004 Invited speaker for the Research Special Interest Section, Featured Academic Session, Long Beach, CA

PUBLICATIONS: Books, Guides, Monographs, and Manuals

Gottlieb, M. (in press). *Common language assessment for language learners: Building blocks for teacher and school leader teams*. Indianapolis, IN: Solution Tree.

Gottlieb, M., Katz, A., & Ernst-Slavit, G. (2009). *Paper to practice: Using the English language proficiency standards in PreK-12 classrooms*. Alexandria, VA: Teachers of English to Speakers of Other Languages.

- Gottlieb, M. (2008). *Assessing English language learners: A multimedia kit for professional development*. Thousand Oaks, CA: Corwin Press.
- Gottlieb, M., & Nguyen, D. (2007). *Assessment & accountability in language education programs: A guide for administrators and teachers*. Philadelphia, PA: Caslon Publishing.
- Gottlieb, M., Cranley, E., & Oliver, A. (2007). *English language proficiency standards and resource guide, 2007 Edition, PreKindergarten through Grade 12*. Madison, WI: Board of Regents of the University of Wisconsin System on behalf of the WIDA Consortium.
- Gottlieb, M. (2007). *ELL assessment kit: Teacher's manual*. Austin, TX: Harcourt Achieve.
- Gottlieb, M. (2006). *Assessing English language learners: Bridges from language proficiency to academic achievement*. Thousand Oaks, CA: Corwin Press.
- Gottlieb, M. (2003). Large-scale assessment of English language learners: Addressing educational accountability in K-12 settings. *Professional Paper #6*. Alexandria, VA: Teachers of English to Speakers of Other Languages.
- Gottlieb, M. (2002). *Wisconsin alternate assessment for students with Limited English Proficiency: Administrators' supplement*. Madison, WI: Wisconsin Department of Public Instruction.
- Gottlieb, M. (2002). *Delaware's Portfolio Assessment for Limited English Proficient Students (PALS) project: Standards-based, language arts assessment, formative phase: Administration and interpretation manual*. Dover, DE: Delaware Department of Education.

Select Chapters in Books

- Gottlieb, M., & Hamayan, E. (2007). Assessing oral and written language proficiency: A guide for psychologists and teachers. In G. B. Esquivel, E. C. Lopez, & S. G. Nahari (Eds.), *Handbook of multicultural school psychology: An interdisciplinary perspective*. New York: Lawrence Erlbaum.
- Gottlieb, M., & Lederman, N. G. (2006). Standards for science and English language proficiency. In D. Crowther & A. Fathman (Eds.), *Science for English language learners*. Arlington, VA: National Science Teachers Association Press.
- Gottlieb, M., & Nguyen, N. D. (2005). Developmental bilingual education in the real world: Using longitudinal data to enhance dual language program development. In Cohen, J., McAlister, K., Rolstad, K., & MacSwan, J. (Eds.), *ISB4: Proceedings of the 4th International Symposium on Bilingualism* (pp. 935-947). Somerville, MA: Cascadilla Press.
- Gottlieb, M., & Boals, T. (2005). On the road to MECCA: Assessing Content-based Instruction within a Standards Framework. In D. Kaufman & J. Crandall (Eds.), *Content-based*

instruction in primary and secondary school settings.(pp. 145-161). Alexandria, VA: Teachers of English to Speakers of Other Languages.

Gottlieb, M. (2000). Standards-based, large-scale assessment. In M. A. Snow (Ed.), *Implementing the ESL standards for Pre-K-12 students through teacher education.* (pp.167-186). Alexandria, VA: Teachers of English to Speakers of Other Languages.

Select Articles and Encyclopedia Entries

Gottlieb, M., & Boals, T. (in press). Language assessment. In J. A. Banks (Ed.), *Encyclopedia of Diversity in Education.* Thousand Oaks, CA: Sage Publications.

Katz, A., & Gottlieb, M. (in press). Assessment in the classroom. In C. Chapelle (Ed.). *Encyclopedia of Applied Linguistics.* Hoboken, NJ: John Wiley & Sons.

Gottlieb, M. (in press). An overview of language education standards. In Coombe, Stoyhoff, Davidson, & O'Sullivan (Eds.). *The Cambridge Guide to Language Assessment.* Cambridge, UK: Cambridge University Press.

Gottlieb, M. The building blocks of language. (2008). In J. González (Ed.) *The encyclopedia of bilingual education.* Thousand Oaks, CA: Sage Publications.

Gottlieb, M. Designation and re-designation of English language learners. (2008). In J. González (Ed.) *The encyclopedia of bilingual education.* Thousand Oaks, CA: Sage Publications.

Gottlieb, M. (2008). Measuring language proficiency. In J. Gonzalez (Ed.) *The encyclopedia of bilingual education.* Thousand Oaks, CA: Sage Publications.

Gottlieb, M. (2007). The concept of validity in a standards-based world. *Perspectives, TESOL Arabia, 14* (3), 4-8.

Gottlieb, M. (2001). Four 'A's needed for successful standards-based assessment and accountability. *NABE News 24* (6), 8-12.

Curriculum Vitae

Carsten Wilmes

(b)(6)

Academic History

2003 – 2007 **University of Illinois at Urbana-Champaign**, Urbana, IL
Ph.D. in German/Second Language Acquisition and Teacher Education with a
specialization in educational assessment, June 2007

Dissertation Topic: “Validation of a German-language placement test based on a
modified C-test procedure.”

Research Advisor: Professor Fred Davidson
Chair: Professor Andrea Golato

2005 Ph.D. Preliminary Exams and Defense of Dissertation Proposal
Concentration in Applied Linguistics and Second Language Acquisition

1999-2001 Master of Arts in Germanic Languages and Literatures
Concentration in Second Language Acquisition
Exam topic: “The critical age hypothesis in second language acquisition.”

Employment History

2010 –present Assistant Director of Assessment, WIDA Consortium,
University of Wisconsin-Madison
- Co-direct vision and planning for English language proficiency (ELP)
 testing products
- Monitor and approve subcontractors’ budgets
- Supervise the operational implementation of WIDA’s testing products
- Assist in the development of new language tests
- Supervise alignment services

2008 – 2010 Assessment Operations Manager, WIDA Consortium,
University of Wisconsin-Madison
- Supervise the operational implementation of WIDA’s ELP testing products
- Assist in the development of new language tests
- Supervise and evaluate research proposals submitted by contractors

- Conduct research on second language acquisition issues relevant to foreign language contexts such as encountered by English language learners in WIDA states

- 2007 – 2008 Alignment Coordinator/Researcher, University of Wisconsin-Madison
- Conduct alignment studies for WIDA member states, in compliance with the requirements of the No Child Left Behind Act of 2001
 - Assist in the development of new language tests

Research Experience

- 2005 – present **Research Assistant, Foreign Language Assessment Group (FLAG), UIUC**

Major projects:

Oral English Placement Test (Oral EPT), UIUC

- Developed a specification-based revision of the Oral EPT for incoming international graduate students

WIDA

- Conduct alignment research pursuant to the requirements of the *No Child Left Behind Act* of 2001
- Participate in alignment workshops

Berlitz Proficiency Interview (BPI), Berlitz International, Inc.

- Develop and validate an unscripted oral proficiency test
- Implement a criterion-referenced test anchored to the CEF scale

- 2003 – 2004 **Research Assistant, Professor Mara Wade, UIUC German**

- Assisted editing work of two scholarly volumes

- 2001 **Research Assistant, Professor Andrea Golato, UIUC German**

- Provided basic research for a second language acquisition project
-

MARIANA CASTRO

Curriculum Vitae

Work Address:

Home Address:

(b)(6)

EDUCATION

- MA** University of Wisconsin, Whitewater, Wisconsin, 2002.
Curriculum Instruction: Second Language Acquisition
- BS** University of Wisconsin, Madison WI, 2000 BS in Education
1997 BS in Chemistry

CERTIFICATIONS

Wisconsin Teacher's License, Chemistry Licensure (610) – NCATE Accredited; Bilingual Secondary Licensure (028) – NCATE Accredited; Bilingual Elementary License (044) – NCATE Accredited; English as a Second Language License (395) – NCATE Accredited

WORK EXPERIENCE

2006 to present, **Professional Development Manager**, WIDA Consortium, Wisconsin Center for Education Research, University of Wisconsin – Madison. Responsible for developing the mission and vision for the Professional Development Department of a consortium of 21 states dedicated to improving standards and assessments for English language learners. Manage and supervise developers, consultants and help desk staff. Provide technical expertise to grant and projects related to the education of English language learners in K-12 educational systems.

2005 to present, **Adjunct Faculty**, Edgewood College, Madison, Wisconsin. Responsible for developing and delivering an ESL methods and assessment courses for undergraduate and graduate students; development and delivery of hybrid and online professional development courses for inservice teachers; supervision and mentoring of pre-service teachers; and guest lecturer in Letters and Science classes.

2003 to 2006 **Program Support Teacher**, Bilingual/ESL Programs, Madison Metropolitan School District (MMSD). Responsible for developing, coordinating and delivering professional development opportunities for educators and administrators in the areas of language acquisition, bilingual literacy, and best practices in instruction and assessment for English language learners. Created, ordered, and coordinated curriculum and materials for six bilingual centers in the school district. Developed and implemented bilingual guidelines

for the transitional bilingual program in the district across 7 centers. Participated in the planning, coordination and training of staff for the summer school academy for English language learners. Trained tutors and volunteers.

2000 to 2003 **Chemistry, Biology, and Bilingual Teacher**, West High School, Madison, Wisconsin. Responsible for developing and implementing curriculum for Newcomer Science, Biology, and Chemistry. Taught chemistry in general education classrooms with clusters of ELLs as well as ESL-Content classes. Developed and implemented a Spanish-taught Latino American Language and Culture Class for Spanish speakers. Participated in the School Improvement Plan process to bring the concept of Smaller Learning Communities to West High School. Participated and collaborated in Professional Development in the area of Racial Equity at a school and district level.

1994-2000 **Bilingual Resource Specialist**, Lincoln Elementary School and Cherokee Middle School, Madison, Wisconsin. Responsible for linguistic and academic support to English Language Learners in the general education classroom. Responsible for small group instruction to pre-teach, teach or re-teach academic concepts and vocabulary. Enhanced the communication between families and schools. Responsible for translating and interpreting in legal cases, such as Individualized Plans of Service (IEP) meetings and documents, expulsion hearings and documents, etc.

Summer of 1999, 2000, and 2001 **Biology and Chemistry Instructor**, PEOPLE Program, University of Wisconsin, Madison, Wisconsin. Taught transitional biology courses as well as enrichment chemistry workshops.

1992-1996 **Spanish Teacher**, Thoreau Elementary School, Cherokee Middle School, MMSD District-wide, Madison, Wisconsin. Responsible for the after school Spanish program for students. Responsible for developing and delivering Spanish classes designed for teachers looking to enhance their Spanish oral skills.

1988-1990 **Teacher of English as a Foreign Language**, Centro Cultural de Lenguas Modernas, Veracruz, Mexico. Responsible for developing and implementing programs to teach children and adults English as a Foreign Language.

AWARDS, GRANTS, HONORS

Aristo Scholar. Recognized as an outstanding educator. Participated in the group of Aristo Scholars who function as a Think-Tank for innovations in the MMSD. 2005 – 2006.

Morgridge Grant Recipient. 1998-2000

PROFESSIONAL AFFILIATIONS

National Association for Bilingual Education (NABE)

Teachers of English to Speakers of Other Languages (TESOL) and Wisconsin Affiliate

Association for Supervision and Curriculum Development (ASCD)

International Reading Association (IRA)
National Staff Development Council (NSDC)

LANGUAGE SKILLS

Fluent in Spanish; near native fluency in English; basic French and Italian.

PRESENTATIONS

WIDA State and Local trainings on standards-based curriculum and instruction across WIDA states, 2006 to present

NSDC, 2009, 2008, 2007

WITESOL, 2009, 2007, 2006

SETESOL, 2009, 2008

Carolina TESOL, 2009

NABE, 2007, 2006\

Language and Culture, UW-Oshkosh, 2010, 2006

A Paso Firme: Uno, Dos, Tres y Avanzando *Math and Literacy Development in Spanish Speaking Children*, Launching into Literacy Annual Conference, March 2006, Madison, WI.

Collaboration to Meet the Needs of the ELLs Conference, University of Wisconsin-Whitewater, 2006, 2005

H. Gary Cook, Ph.D.

EDUCATION

- May 2001* Ph.D., Educational Measurement, Evaluation and Research Design, Michigan State University
- June 1990* MA, Teaching English as a Second Language (TESOL), University of Hawai'i at Manoa
- June 1988* BA, Linguistics, University of Hawai'i at Manoa

PROFESSIONAL EXPERIENCE

- June 2007 to present* **Research Scientist:** Wisconsin Center for Educational Research-Value-added Research Center. Function as an embedded researcher and manage the WIDA Consortium's research and evaluation process. Provide policy research and evaluation consultation services for WIDA staff and member states.
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- January 2005 to June 2007* **Research Scientist:** Wisconsin Center for Educational Research-Value-added Research Center. Function as an embedded researcher and manage Milwaukee Public School's research and evaluation process. Provide policy research and program evaluation consultation and services for training staff within the Milwaukee Public Schools in advanced statistics for the Value-Added Research at Milwaukee Public Schools project.
-
- January 2005 to June 2007* **Private Consultant:** Provide consultation to states, universities and professional organizations on psychometric issues associated with state assessments and accountability systems. Provide specific expertise in federal assessment statutes, English language and special education assessments, alignment, and growth/value-added modeling in education.
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- June 2002 to December 2004* **Vice President of State Accounts:** Harcourt Assessment, Inc. Direct and manage company's State-level National Measurement Consultants. Provide leadership role and national strategy for winning and expanding statewide assessment accounts. Provide psychometric and statistical support for state clients as well as organizing support for regional Vice Presidents and Measurement Consultants. Provide expert advice regarding state and federal legislation, especially as it relates to the No Child Left Behind Act of 2001. Represent Harcourt at regional and national meetings, conferences and organizations.
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- October 1998 to June 2002* **Director, Office of Educational Accountability:** Wisconsin Department of Public Instruction. Direct the development, administration, scoring, reporting and management of the state of Wisconsin's public school assessment programs. Responsible for the supervision of 17 professional assessment staff members as well as the management of a \$5 million annual state assessment budget.
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- August 1990 to 1998* **Testing Coordinator:** English Language Center, Michigan State University (MSU). Responsible for the development and administration of the English language testing program and consult in English language research at MSU.
-
- August 1990 to 1998* **Specialist:** English Language Center, MSU. Responsible for curriculum development, in addition responsible to teach advanced English for academic purposes preparation courses for incoming international students at MSU.
-

August 1992 to 1998	Educational Research Consultant: Measurement Plus+, Lansing, MI. Owner and chief consultant of an educational research consulting business. Focus of business is to consult secondary and post-secondary institutions in the areas of measurement, program evaluation and research with specialty areas in large-scale state assessment, English language learner assessment, and special education assessment. Clients have been Ferris State University, Princeton University, University of Michigan, Central Michigan University, University of Detroit, Mercy, Lansing Community College.
Summer 1996, 1998	Lecturer: Department of Counseling, Educational Psychology and Special Education, MSU. Taught graduate summer course in introductory statistics (CEP 822). Taught basic statistical concepts and research methodologies.
August 1989 to June 1990	Testing Coordinator: English Language Institute, University of Hawai'i at Manoa. Responsible for the supervision, administration and development of the English language testing program at the English Language Institute.
August 1989 to June 1990	Writing Instructor: English Language Institute, University of Hawai'i at Manoa. Taught international graduate students in the writing of scientific papers.
June 1988 to August 1989	ESL Instructor: Taught beginning, intermediate and advanced ESL course at the following language schools in Honolulu Hawai'i: Pacific International Language School, McKinley High School, and New Intensive Course in English (N.I.C.E.) Program.

PUBLICATIONS/TECHNICAL REPORTS

Kenyon, D.M., MacGregor, D., Li, D. Cook, H.G. (Forthcoming) Issues in Vertical Scaling of a K-12 English Language Proficiency Test. *Language Testing*.

Cook, H.G. (Summer 2010). Formative Assessment: FLARE Project. *AccELLerate! The quarterly newsletter of the National Clearinghouse for English Language Acquisition, Volume 2, Issue 4*.

Cook, H.G. (2009a). WIDA Focus on Growth. WIDA Focus on Series, vol 1: 1. Retrieved May 19, 2008, from http://www.wida.us/ACCESSTraining/Focus/on_Growth.pdf.

Cook, H.G. (2009b). Annual Measurable Achievement Objective # 2 (AMAO 2): A Report on a Meeting Comparing the Kentucky Core Content Test (KCCT) and ACCESS for ELLs™ to Establish an AMAO 2 Exit Criterion. Kentucky Department of Education.

Cook, H. G., Boals, T., Wilmes, C., & Santos, M. (2008). Issues in the development of annual measurable achievement objectives for WIDA consortium states (WCER Working Paper No. 2008-2). Madison: University of Wisconsin–Madison, Wisconsin Center for Education Research.

Cook, H.G. (2007). Alignment Study Report: The WIDA Consortium's English Language Proficiency Standards for English Language Learners in Kindergarten through Grade 12 to ACCESS for ELLs® Assessment. Wisconsin Center for Education Research; Madison

- Wisconsin. Retrieved January 7, 2008 from www.wida.us/Research/Alignment/WIDA-ACCESS%20Alignment.pdf.
- Cook, H.G. and Wilmes, C. (2007). Alignment Between the Kentucky Core Content for Assessment and the WIDA Consortium English Language Proficiency Standards. Wisconsin Center for Education Research; Madison Wisconsin. Retrieved January 7, 2008 from www.wida.us/Research/Alignment/Kentucky%20Alignment%20Report.pdf.
- Cook, H.G.(2006). Aligning English Language Proficiency Tests to English Language Learning Standards. Assessing Limited English Proficiency Students State Collaborative on Assessment and Student Standards (SCASS), Chief Council of State School Officers (CCSSO), Washington, D.C.
- Cook, H.G.(2006). Findings of an Alignment Study of the Stanford English Language Proficiency Test and the English Language Proficiency (World-Class Instructional Design and Assessment) to the Delaware Grade Level Expectations in English Language Arts for Grades 3, 4, 5, 6, 7, 8, 9, and 10. Delaware Department of Education; Dover, DE. Retrieved January 7, 2008 from www.doe.k12.de.us/programs/aab/files/DE%20SELP-ELP%20Alignment%20Report-final.pdf.
- Cook, H.G. (2006). Hawaii State Alternate Assessment Technical Report—Year 1. State of Hawaii Department of Education, Honolulu, HI.
- Cook, H.G., Chin-Chance, S., Sueoka, L. (2006). Summary Report: Alternate Achievement Standards Proficiency Scores for the Hawaii State Alternate Assessment (HSAA). State of Hawaii Department of Education, Honolulu, HI.
- Cook, H.G. (2006). Hawaii State Alternate Assessment Pilot Test Administration Technical Report. State of Hawaii Department of Education, Honolulu, HI.
- Cook, H.G. (2006). Alignment Study: Pennsylvania’s Language Proficiency Standards for English Language Learners to Stanford English Language Proficiency Test. State of Pennsylvania Department of Education; Harrisburg, PA.
- Cook, H.G. (2006). Alignment Study Report: Reading and Mathematics Assessment Frameworks to Illinois Measure of Annual Growth in English (IMAGE). Illinois State Board of Education; Springfield, IL.
- Cook, H.G. (2005). Research Report #0504: Milwaukee Public Schools Alignment Study Of Milwaukee Public Schools’ Learning Targets In Reading and Math To Wisconsin Student Assessment System Criterion-Referenced Test Frameworks in Reading and Math. Milwaukee Public Schools Office of Assessment and Accountability; Milwaukee, WI.
- Cook, H.G.(2005). Research Report #0503: Evaluation of the Milwaukee Teacher Education Center (MTEC) At Elementary Grades. Milwaukee Public Schools Office of Assessment and Accountability; Milwaukee, WI.
- Cook, H.G. (2005). Alignment Study: Wyoming’s K-12 English Language Development Standards for English Language Arts to Stanford English Language Proficiency Test. Wyoming Department of Education, Casper, WY.

Cook, H.G. (2005). Alignment Study: Michigan's K-12 English Language Proficiency Standards to Mountain West's ELL Assessment and Accountability/Works' ELL Assessment. Michigan Department of Education, Lansing, Michigan.

Cook, H.G. (2005). Alignment Study: South Dakota's English Language Proficiency Standards for English Language Learners K-12 to Stanford English Language Proficiency Examination. South Dakota Department of Education: Pierre, South Dakota.

Cook, H. G. (2005). Research Report #0501: What's Best in the Middle? Student Engagement, Achievement, Attainment, and Growth Differences Between K-8 and Middle School Grade Configurations at Milwaukee Public Schools. Milwaukee Public Schools Office of Assessment and Accountability: Milwaukee, WI.

Cook, H.G. (2003). Technical Report: Scoring of the Nebraska Statewide Eighth Grade Writing Assessment. Nebraska Department of Education: Lincoln, NE.

Cook, H.G. (2001). Investigating Growth Trajectories on English as a Second Language Listening and Reading Comprehension Tests. Unpublished doctoral thesis.

Cook, H.G. (December, 2000). The coming testing backlash? National Council on Measurement in Education Newsletter, 8:4.

Cook, H.G., Fredrick, V. & Karbon, J. (2000). Wisconsin Makes the Connection: Teaching and Testing Reading Comprehension—A Handbook for Teachers. Wisconsin Department of Public Instruction: Madison, WI.

Fortier, H. Cook, H.G., & Burke, N. (2000). Wisconsin High School Graduation Test Educator's Guide. Wisconsin Department of Public Instruction: Madison, WI.

GRANT AWARDS

Co-Principal Investigator (2004-2005). Enhancing the Hawaii State Alternate Assessment System: Development, Implementation, and Validation. U.S. Department of Education, Office of Special Education Programs, \$441,000.

Principal Investigator (2008-2011). Formative Language Assessment Records for ELLs (FLARE) in Secondary School: Development of an integrated formative assessment system in middle and high schools for ELLs. Carnegie Corporation of New York, \$1,605,000.

Research methodologist for the University of Wisconsin, Language Institute (2009-2001). Goals of Postsecondary Students and the National Standards for Foreign Language Learning. US Department of Education, International Research and Studies Program Grant, CFDA # 84.017A. \$554,674.

The Center of Applied Linguistics **Organizational Capacity Description**

The Center for Applied Linguistics (CAL) is a private, nonprofit 501(c)(3) organization headquartered in Washington, D.C., that has for 50 years been involved in the study of language and the application of linguistics research to educational, cultural, and social concerns. It has conducted research, developed assessment instruments, prepared curricula for school and adult populations, and trained teachers and service providers across a broad spectrum of the education field. CAL has also been at the forefront of developing language proficiency tests for English language and literacy, as well as foreign languages. Through its clearinghouses and centers, CAL has maintained the most up-to-date information on language-related issues.

A key focus of CAL's work is encouraging and improving language and literacy education and student achievement in the United States. CAL's work includes the development of assessments for preK–12 and adult ELs; training for test administrators using ESL assessments; training of trainers who train test administrators to administer ESL assessments; technical assistance for programs using CAL assessments; professional development for teachers of ELs; literature reviews on topics related to ELs; quantitative and qualitative research on English language acquisition among children and adults; information collection, analysis, and dissemination; and program evaluation. CAL's facilities offer the state-of-the-art equipment and space necessary to carry out its work efficiently. One of CAL's strongest assets is its multiethnic, multilingual, and multidisciplinary staff, including almost 100 professional and support staff with broad expertise and training in test development, linguistics, second language acquisition, psychology, psychometrics, sociology, and education. The staff includes native and near-native speakers of many languages.

Working with the multistate WIDA Consortium, CAL has developed piloted, field tested, and maintained assessments to measure the English language development in listening, speaking, reading, and writing of ELs for an annual state-wide testing system for Grades K–12 compliant with the demands of NCLB. CAL's tasks are to (a) support the annual ACCESS for ELLs® English language proficiency test program and annually refresh the operational test; (b) assist the consortium in developing computer-based assessments to allow low-proficiency ELs to demonstrate content knowledge in English language arts, math, and science; (c) provide professional development to WIDA Consortium teachers in using the consortium's test and scores and the WIDA standards; and (d) provide technical and psychometric expertise, such as analyzing test data and producing an annual technical report for ACCESS for ELLs®, as well as undertaking special technical studies, such as the development of grade-level cut scores. As a leading expert in the field of language testing, CAL was a sole-source provider in the original WIDA grant proposal in 2003 and continues in this role.

Other CAL projects relevant to this proposal include:

- With the University of Houston, CAL was involved in the development, validation, and norming of a diagnostic assessment of reading comprehension for ELs in Grades 3–5. (2009–2010)
- With the Rhode Island Department of Elementary and Secondary Education and WIDA, CAL was involved in developing and implementing a science test for

beginning ELs for use in meeting state accountability requirements under NCLB. (2007–2009)

- With the Illinois State Board of Education and WIDA, CAL was involved in developing and implement a mathematics test for beginning ELs. (2008–2010)

As previously noted, CAL is the primary agency responsible for WIDA test development, including identifying content experts and overseeing the technical elements of the assessment, under the direction of **Psychometrician, Dorry Kenyon, PhD**. Dr. Kenyon is the Director of the Language Testing Division. He directs all aspects of CAL's test development and language assessment research activities through such functions as preparing proposals for the funding of testing and related projects; managing test development and related research projects; designing research and evaluation studies relevant to CAL's language assessment projects; conducting and interpreting psychometric and statistical analyses; managing the work of the division's testing staff, interns and consultants; directing the publication of manuals and accompanying materials for CAL's operational testing programs; providing guidance to the marketing and operations of CAL's testing programs; serving as senior advisor on a language testing projects within the division; and directing the preparation of final project reports.

DORRY M. KENYON

(b)(6)

EDUCATION

Ph.D., Measurement, Applied Statistics and Evaluation

University of Maryland, College Park, MD, 1995

Linking Multiple-Choice Test Scores to Verbally-Defined Proficiency Levels: An Application to Chinese Reading Proficiency (Winner of the 1997 Award for Outstanding Doctoral Dissertation Research on Second/Foreign Language Testing by the Educational Testing Service's TOEFL Policy Council)

M.A., Teaching English as a Foreign Language

American University in Cairo, Cairo, Egypt, 1984

M.T.S., Theology

Gordon-Conwell Theological Seminary, South Hamilton, MA, 1980

Magna cum laude

B.A., German, Economics

Bowdoin College, Brunswick, ME, 1978

Summa cum laude, Phi Beta Kappa, High Honors in German

PROFESSIONAL EXPERIENCE

CENTER FOR APPLIED LINGUISTICS, Washington, DC

Director, Language Testing Division, 1995–present

Associate Director, National Capital Language Resource Center/CAL, 1994–2001

Associate Director, Division of Foreign Language Education and Testing, 1992–1995

Test Development Specialist, Division of Foreign Language Education and Testing, 1987–1992

As Director, direct or serve as senior advisor on all aspects of CAL's test development, language assessment research activities, and psychometric and quantitative analyses, while managing a division of approximately 40 staff members.

GEORGETOWN UNIVERSITY, Washington, DC

Adjunct Faculty, Department of Linguistics, Summers 1996–1998

Taught the language testing course during the summer school session.

VARIOUS

Teacher of ESL, EFL, German, 1980–1987

Held various English-as-Second-Language, English-as-a-Foreign-Language, and German teaching positions for junior high school, high school, college, and adult students in Switzerland, Germany, Egypt, and the U.S.

Dorry M. Kenyon, Center for Applied Linguistics

PROJECTS (SELECTED)

VOCABULARY INSTRUCTION AND ASSESSMENT FOR SPANISH SPEAKERS

Co-Principle Investigator for the Research Core, 2007–present

WIDA ACCESS FOR ELLS[®]—TEST DEVELOPMENT AND PSYCHOMETRICS

Project Director, 2003–present

BEST LITERACY UPDATE

Senior Advisor, 2007–2008

WORKFORCE READINESS CREDENTIAL: ORAL LANGUAGE TEST

Senior Advisor, 2005–2007

ADULT ESL ASSESSMENTS

Project Director, 2005–2007

ACQUIRING LITERACY SKILLS IN ENGLISH

Principle Investigator for the Assessment Core, 2001–2006

FOREIGN LANGUAGE NAEP ITEM DEVELOPMENT PROJECT

Project Director for Developing Conversation-based Tasks, 2001–2004

BEST PLUS: DEVELOPMENT OF A COMPUTER-ASSISTED ORAL PROFICIENCY INTERVIEW FOR ADULT ESL LEARNERS

Project Director, 1999–2004

FOREIGN LANGUAGE NAEP FRAMEWORK AND SPECIFICATIONS DEVELOPMENT PROJECT

Project Director, 1999–2000

SIMULATED ORAL PROFICIENCY INTERVIEWS (SOPIs) IN SPANISH, FRENCH, GERMAN, RUSSIAN, CHINESE REVISIONS), JAPANESE, ARABIC, HAUSA, HEBREW, INDONESIAN, PORTUGUESE

Various roles, 1987–1997

SELF-INSTRUCTIONAL RATER TRAINING KITS FOR SOPIs IN SPANISH, FRENCH, GERMAN, RUSSIAN, CHINESE, JAPANESE, ARABIC

Various roles, 1992–1997

MULTIMEDIA SELF-INSTRUCTIONAL RATER TRAINING PROGRAMS FOR SOPIs IN SPANISH, FRENCH AND GERMAN

Project Director, 1996–2000

PUBLICATIONS (SELECTED)

Kenyon, D.M. (In press). Standard setting. In C.A. Chapelle (Ed), *The Encyclopedia of applied linguistics*. Oxford, UK: Wiley-Blackwell.

Dorry M. Kenyon, Center for Applied Linguistics

- Kenyon, D.M. & MacGregor, D. (In press). Pre-operational testing. In G. Fulcher & F. Davidson (Eds), *Routledge handbook of language testing*. New York: Routledge.
- Römhild, A., Kenyon, D.M., & MacGregor, D. (In press). Exploring domain-general and domain-specific linguistic knowledge in the assessment of academic English language proficiency, *Language Assessment Quarterly*.
- Kenyon, D. M, MacGregor, D., Li, D., & Cook, H. G. (In press). Issues in vertical scaling of a K-12 English language proficiency test, *Language Testing*.
- Kenyon, D.M. & Malone, M. (2010). Investigating examinee autonomy in a computerized test of oral proficiency. In L. Araújo (Ed.). *Computer-based assessment of foreign language speaking skills* (Joint Research Center Scientific and Technical Reports) Luxembourg: Publications Office of the European Union.
- Albers, C. A., Kenyon, D. M., & Boals, T. J. (2009). Measures for determining English language proficiency and the resulting implications for instructional provision and intervention. *Assessment for Effective Intervention*, 34(2), 74–85.
- Malabonga, V., Kenyon, D. M., August, D., Louguit, M., & Carlo, M. (2008). Development of a cognate awareness measure for Spanish-speaking English Language Learners. *Language Testing*, 25(4), 495–519.
- Bauman, J., Boals, T., Cranley, E., Gottlieb, M., & Kenyon, D. M. (2007). Assessing comprehension and communication in English state to state for English language learners (ACCESS for ELLs). In J. Abedi. (Ed.), *English language proficiency assessment in the nation: Current status and future practice*, (pp. 81–91). Davis, CA: University of California, Davis.
- Howard, E., Arteagoitia, I., Loguit, M., Malabonga, V., & Kenyon, D. M. (2006). The English Developmental Contrastive Spelling Test: A tool for investigating Spanish influence on English spelling development. *TESOL Quarterly*, 40(2), 399–420.
- Arteagoitia, I., Howard, E., Louguit, M., Malabonga, V., & Kenyon, D. M. (2005). The Spanish Developmental Contrastive Spelling Test: A measure to assess Spanish spelling development in the upper elementary grades. *Bilingual Research Journal*, 29, 3.
- Malabonga, V., Kenyon, D. M., & Carpenter, H. (2005). Self-assessment, preparation and response time on a computerized oral proficiency test. *Language Testing*, 22(1), 59–92.
- Kenyon, D. M. & Malabonga, V. (2001). Comparing examinee attitudes toward computer-assisted and other oral proficiency assessments. *Language Learning & Technology* 5(2), 60–83. Available from <http://llt.msu.edu>.
- Kenyon, D. M. (2000). Enhancing oral proficiency assessment through multimedia: A model, applications, and research needs. In E. Tschirner, H. Funk, and M. Koenig (Eds.), *Schnittstellen: Lehrwerke zwischen alten und neuen Medien* [Interfaces: Instructional materials between old and new media.] (pp. 171–201). Berlin, Germany: Cornelsen Verlag.
- Kenyon, D. M. (2000). Tape-mediated oral proficiency testing: Considerations in developing Simulated Oral Proficiency Interviews (SOPIs). In S. Bolton (Ed.), *TESTDAF: Grundlagen für die Entwicklung eines neuen Sprachtests. Beiträge aus einem Expertenseminar* [TESTDAF: Foundations for the development of a new language test. Contributions from a seminar of experts] (pp. 87–106). Köln (Cologne), Germany: Gilde Verlag.

- Kenyon, D. M., Farr, B., Mitchell, J., & Armengol, R. (2000). *Framework for the 2004 Foreign Language National Assessment of Educational Progress: Pre-publication edition*. Washington, DC: National Assessment Governing Board. Available from <http://www.nagb.org/pubs/FinalFrameworkPrePubEdition1.pdf>
- Kenyon, D. M., & Tschirner, E. (2000). The rating of direct and semi-direct oral proficiency interviews: Comparing performance at lower proficiency levels. *Modern Language Journal*, 84(1), 85–101.
- Malabonga, V., & Kenyon D. M. (1999). Multimedia computer technology and performance-based language testing: A demonstration of the Computerized Oral Proficiency Instrument (COPI). In M. B. Olsen (Ed.), *Computer mediated language assessment and evaluation in natural language processing: Proceedings of a symposium sponsored by the Association for Computational Linguistics and International Association of Language Learning Technology* (pp. 16–23). New Brunswick, NJ: Association for Computational Linguistics.
- Kenyon, D. M. (1998). An investigation of the validity of task demands on performance-based tests of oral proficiency. In A. J. Kunnan (Ed.), *Validation in language assessment* (pp. 19–40). Mahway, NJ: Lawrence Earlbaum Associates.
- Scott, M. L., Stansfield, C. W., & Kenyon, D. M. (1996). Examining validity in a performance test: The Listening Summary Translation Exam (LSTE)-Spanish Version. *Language Testing*, 13, 83–109.

PRESENTATIONS (SELECTED MOST RECENT)

- Kenyon, D. M. (2010, June). *The necessity of triangulation in creating correspondences between verbally-defined levels of language proficiency*. Invited paper presented at the ACTFL-CEFR Alignment Conference, University of Leipzig, Leipzig, Germany.
- Kenyon, D. M., & Malone, M. (2010, June). *Investigating examinee autonomy in a computerized test of oral proficiency*. Invited paper presented at the European Commission Conference on Computer-based Testing of Speaking Skills, Brussels, Belgium.
- Boals, T., Kenyon, D. M., Chi, Y., Lin, C-K, Davidson, F., & Wilmes, C. (2010, April). *Assessing levels of academic language proficiency: Conceptualization, operationalization, alignment, and validation*. Two-day workshop presented prior to the annual meeting of the Language Testing Research Colloquium (LTRC), University of Cambridge, Cambridge, England.
- MacGregor, D., & Kenyon, D. M. (2010, March). *Academic language of the content areas and general academic language*. Paper presented in colloquium (B. Mohan, C. Chapelle, orgs.), *Linguistic bases for construct definition in tests of academic language ability* at the annual meeting of the American Association of Applied Linguistics (AAAL), Atlanta, GA.
- Kenyon, D. M. (2009, March). *Accountability and assessment in adult ESL education*. Paper presented at the annual meeting of the American Association of Applied Linguistics (AAAL), Denver, CO.
- Römhild, A., Kenyon, D. M., & MacGregor, D. (2009, March). *Assessing domain-general and domain-specific academic English language proficiency*. Paper presented at the annual meeting of the Language Testing Research Colloquium (LTRC), Denver, CO.

- Kenyon, D. M., Lieberson, D., & Ryu, W. (2008, April). *Setting standards for an Adult ESL assessment*. Paper presented at the annual convention of the Teachers of English to Speakers of Other Languages (TESOL), New York, NY.
- MacGregor, D., Kenyon, D. M., & Christenson, J. (2008, March). *Predicting item difficulty: A rubrics-based approach*. Paper presented at the annual meeting of the American Association of Applied Linguistics (AAAL), Washington, DC.
- Römhild, A., Kenyon, D. M., & MacGregor, D. (2008, March). *Assessing academic English language proficiency: Clarifying the construct*. Paper presented at the annual meeting of the American Educational Research Association (AERA), New York, NY.

TECHNICAL COMPETENCIES

Microsoft Office (Word, Excel, Power Point); Psychometric and Statistical Applications (SPSS, GENOVA, WINSTEPS, FACETS, EQS)

ADVISORY POSITIONS

- Member, *Defense Language Testing Advisory Board*, 2006–present
- Editorial Board Member, *Language Assessment Quarterly*, 2003–present
- Member, *Steering Committee*, NAEP Writing Framework Revision Project, 2006–2007
- Member, *Work Group on Functional Oral Health Literacy*, National Institutes of Health/National Institute of Dental and Craniofacial Research, 2003–2004
- Member, *Technical Advisory Group*, Equipped for the Future Assessment Consortium, 2001–2004
- Member, Organizing Committee, *Annual Meeting of the East Coast Organization of Language Testers (ECOLT)*, 2002–present
- Book Review Editor, *Language Testing*, 1993–2002

PROFESSIONAL AFFILIATIONS

- American Association for Applied Linguistics
- American Educational Research Association
- East Coast Organization of Language Testers (founding member)
- International Language Testing Association (Member at Large, ILTA Executive Board, 2001–2003)
- National Council on Measurement in Education

LANGUAGES

German (advanced); French (intermediate); Spanish (intermediate); Italian (intermediate); Dutch (beginner); Slovak (beginner); Egyptian Colloquial Arabic (beginner); Biblical Greek (intermediate), Biblical Hebrew (beginner)

Dorry M. Kenyon, Center for Applied Linguistics

MARGARET E. MALONE

(b)(6)

EDUCATION

Ph.D., Linguistics

Georgetown University, Washington, DC, 1999

Dissertation: The development and validation of the English Speaking Test; Concentration in Applied Linguistics; U.S. Department of Education Title VII Fellow

M.S., Linguistics

Georgetown University, Washington, DC, 1992

Thesis: Error Patterns on Tape-Mediated Oral Proficiency Interviews and the ACTFL Guidelines; Concentration in Applied Linguistics; U.S. Department of Education Title VII Fellow

B.A., Language Studies

Wellesley College, Wellesley, MA, 1990

Thesis: The Effect of Child Directed Speech on Adult Tone Language Acquisition; Magna cum laude, Durant Scholar, Departmental Honors in Language Studies

PROFESSIONAL EXPERIENCE

CENTER FOR APPLIED LINGUISTICS, Washington, DC

Senior Testing Associate, Language Testing Division, 2000–present

Direct technology-mediated projects on oral proficiency testing. Develop oral proficiency tests and related professional development workshops. Design and direct project on stakeholder perceptions toward TOEFL iBT. Manage team of six.

PEACE CORPS, Washington, DC

Language Testing Specialist, Center for Field Assistance and Applied Research, 1996–2000

Directed a worldwide language testing program in over 60 countries in 150 languages and oversaw the work of over 600 certified testers. Managed annual review of training status reporting, analysis, and recommendations for Peace Corps worldwide. Managed budgets, operations planning, workshop facilitation, and reporting.

THE GEORGE WASHINGTON UNIVERSITY, Arlington, VA

Research Associate, Center for Equity and Excellent in Education/Evaluation Assistance Center East, 1994–1996

Provided technical assistance to six states on teaching and learning through a cooperative, team approach. Conducted workshops for teachers, administrators, and other professionals on Goals 2000, language assessment, program evaluation, and Title VII legislation. Reviewed state policies on LEP student assessment.

CENTER FOR APPLIED LINGUISTICS, Washington, DC

Language Testing Specialist, Language Testing Division, 1990–1994

Coordinated team developing and the Spanish Speaking Test. Participated in a team to develop the Japanese Speaking Test, including item writing and primary responsibility for field testing.

Margaret E. Malone, Center for Applied Linguistics

GEORGETOWN UNIVERSITY, Washington, DC

Adjunct Professor, Linguistics Department, 1993, 1994, 2000, 2007

Taught graduate-level courses on language testing and teaching methods.

PROJECTS (SELECTED)

PROMOTING ORAL PROFICIENCY GAIN IN STUDY ABROAD

Project Director, 2010–present

Direct project to investigate effects of intervention and training with students and homestay families on oral proficiency gain in study abroad in four countries across four languages. Design research study and manage research team and contractors. (\$450,000, 36 months)

DEVELOPING THE MANDARIN COMPUTERIZED ORAL PROFICIENCY INSTRUMENT, U.S. Department of Education

Project Director, 2010–present

Direct project to develop a Mandarin (Chinese) Computerized Oral Proficiency instrument. Manage team develop 100+ test tasks, pilot testing, field testing, analysis of data, and operationalization of test. (\$390,000, 3 years)

NATIONAL CAPITAL LANGUAGE RESOURCE CENTER, U.S. Department of Education

Co-Director, 2010–present

Serve as Co-Director of one of 15 national Language Resource Centers. Develop online tutorials for assessment users. Conduct annual professional development workshops on program evaluation and student assessment. Develop multimedia rater training programs, delivered via CD-ROM, to train raters of oral proficiency tests. Conduct online language assessment courses. (\$98,000 annually)

STARTALK PORTFOLIO ASSESSMENT, Center for the Advanced Study of Language

Project Director, 2009–present

Direct project to pilot, design, and operationalize achievement test for Arabic and Chinese language from 50 summer high school programs. Manage partnerships with two additional national organizations. (\$378,000, 18 months)

STARTALK EVALUATION, National Foreign Language Center

Project Director, 2006–present

Direct project to design, implement, and analyze 1,200+ annual evaluations of summer language programs for teachers and students. Recommend improvements for policy and standards. (\$1.4 million, 5 years)

FOREIGN LANGUAGE ASSESSMENT DIRECTORY PROJECT, U.S. Department of Education

Project Director, 2005–2009

Directed project to update, improve, and merge two existing directories of foreign language tests via focus group and distance review of products. Managed team to develop online tutorial on language test selection. (\$390,000, 3 years)

STAKEHOLDER PERCEPTIONS OF THE TOEFL iBT, Educational Testing Service

Project Director, 2008–2010

Directed multi-methods research of student, instructor, and administrator perceptions of the TOEFL iBT. Designed online, multilingual surveys for 1,200 participants. Managed focus groups in U.S. and overseas. Conducted stimulated recall protocols. (\$87,000, 18 months)

Margaret E. Malone, Center for Applied Linguistics

STAR PROFICIENCY ASSESSMENT TRAINING PROGRAM, University of Maryland

Project Director, 2008–2010

Designed blended learning professional development program for teachers of critical languages. Used online and face-to-face approaches to provide basic background on and strategies for classroom assessment of K–16 learners of Arabic, Chinese, Hindi, Persian, and Urdu. (\$100,000 annually)

NATIONAL CAPITAL LANGUAGE RESOURCE CENTER, U.S. Department of Education

Assessment Director, 2006–2010

Conducted annual professional development workshops on program evaluation and student assessment. Developed multimedia rater training programs, delivered via CD-ROM, to train raters of oral proficiency tests. Conducted online language assessment courses. (\$72,000 annually)

LANGUAGE PROGRAM ASSESSMENT, Council of American Overseas Research Centers /Dept of State

Project Director, 2008–2010

Conducted analysis of language curricula in 14 overseas language programs. Developed and analyzed results of 185-student Arabic language self-assessment and efficacy for student placement.

DEVELOPING THE COMPUTERIZED ORAL PROFICIENCY INSTRUMENT, U.S. Department of Education

Project Director, 2004–2008

Directed project to develop CD-ROM based Arabic and Spanish oral proficiency tests. Managed project staff of two FTEs plus over 10 consultants. (\$459,000, four years)

ACTFL ASSESSMENT OF PROFICIENCY AND PERFORMANCE, U.S. Department of Education

Project Manager, 2005–2008

Worked with three organizations' teams to create a national framework for K-16 foreign language assessment. Developed prototypical tasks. Conducted stimulated recall studies with students on task effectiveness. (\$105,000, 3 years)

IMPACT OF TITLE VI DEPARTMENT OF EDUCATION PROJECTS, JBL Associates/U.S. Department of Education

Project Director, 2007–2008

Directed CAL portion of project to measure impact of 50 years of Title VI funding for U.S. Department of Education grants. Managed staff of three. Coordinated efforts with prime contractor. (\$75,000, 18 months)

PUBLICATIONS (SELECTED)

- Riestedberg, K., Di Silvio, F., Donovan, A., & Malone, M. E. (2010). Development of a computer-based workshop to foster assessment literacy. *Journal of the National Council of the Less Commonly Taught Languages*, 9, 21–42.
- Malone, M. E., & Montee, M. J. (2010). Oral proficiency assessment: Current approaches and applications for post-secondary foreign language programs. *Language and Linguistics Compass*, 4(10), 972–986.
- Kenyon, D., & Malone, M. E. (2010). Investigating examinee autonomy in a computerized test of oral proficiency. In L. Araújo (Ed.), *Computer-based assessment of foreign language speaking skills* (Joint Research Center Scientific and Technical Reports) Luxembourg: Publications Office of the European Union.

Margaret E. Malone, Center for Applied Linguistics

- Nier, V., Donovan, A., & Malone, M. E. (2009). Increasing assessment literacy among LCTL instructors through blended learning. *Journal of the National Council of Less Commonly Taught Languages*, 7, 103-131.
- Cavella, C., & Malone, M. E. (2008). Teaching principles of assessment online. In S. Goertler and P. Winke (Eds.), *Opening doors through distance language education: Principles, perspectives, and practices*. CALICO Monograph Number 7.
- Malone, M. E. (2008). Training in language assessment. In N. Hornberger & E. Shohamy (Eds.), *Encyclopedia of Language Education*. New York: Springer.
- Malone, M. E. (2006). Assessing speaking. [Review of the book *Assessing speaking*, by S. Luoma]. *The Modern Language Journal*, (90)4.
- Malone, M. E. (2005). Woodcock-Munoz Language Survey [Review of test Woodcock Munoz Language Survey]. In S. Stoyhoff & C. A. Chapelle, *ESOL tests and testing*. Alexandria, VA: Teachers of English to Speakers of Other Languages (TESOL).
- Malone, M. E., Rifkin, B., Christian, D., & Johnson, D. E. (2004). Attaining high levels of proficiency: Challenges for language education in the United States. *Journal for Distinguished Language Studies*, (2).
- Malone, M. E. (2004). Research on the oral proficiency interview: Analysis, synthesis and future directions. *Foreign Language Annals*, 36(4), 491-497.
- Malone, M. E., Rifkin, B. Christian, D., & Johnson, D. E. (2003). Attaining high levels of proficiency: Challenges for foreign language education in the United States. *ERIC/CLL Newsletter*, 26(2), 1-3.
- Malone, M. E. (2000). Using standards for classroom-based assessment. In Snow, A. M. (Ed.), *Implementing the ESL standards for PreK-12 students through teacher education*. Alexandria, VA: Teachers of English to Speakers of Other Languages (TESOL).

PRESENTATIONS (SELECTED)

- Malone, M. E., & Montee, M. J. (2011, January). *Understanding assessment: STARTALK proficiency assessment training program*. Workshop at the University of New Mexico.
- Hart, B., & Malone, M. E. (2010, November). *Building a gateway for language and culture: Lessons from STARTALK*. Paper presented at the annual convention of the American Council on the Teaching of Foreign Languages, Boston, MA.
- Jackson, F., & Malone, M. E. (2010, November). *Administrators: Gateway to district excellence in foreign language programming*. Paper presented at the annual convention of the American Council on the Teaching of Foreign Languages, Boston, MA.
- Ingold, C., & M. E. Malone (2010, November.) *STARTALK: Our mission, accomplishments and directions*. Plenary presentation at Interagency Language Roundtable.
- Ross, S., Malone, M. E., & Clark, M. (2010, October). *Developing an assessment framework for short-term, beginning level language assessment*. Paper presented at the annual conference of the East Coast Organization of Language Testers.
- Di Silvio, F., & Malone, M. E. (2010, October). *Promoting oral proficiency gain in study abroad: A pilot study*. Poster presented at the annual conference of the East Coast Organization of Language Testers.
- Malone, M. E. (2010, October) *Expanding our National Language Resources*. Invited Keynote at Center for Advanced Research on Language Acquisition. Minneapolis, MN.
- Ross, S. & Malone, M. E. (2010, October). *Outcomes of summer 2010 STARTALK assessment and observation*. Presentation at the STARTALK awardee Fall 2010 conference, Atlanta, GA.
- Malone, M. E. (2010, September). *User beliefs about TOEFL iBT test items in relation to academic tasks*. Paper presented at TOEFL iBT Research Symposium, Educational Testing Service.

Margaret E. Malone, Center for Applied Linguistics

- Sugarman, S., Malone, M. E., & Di Silvio, F. (2010, May). *Planning for language program evaluation*. Workshop for foreign language instructors and administrators conducted at the Center for Applied Linguistics, Washington, DC.
- Malone, M. E., Montee, M., & Yin, C. (2010, April). *User Perceptions of academic language proficiency and the TOEFL iBT*. Paper presented at the 32nd Language Testing Research Colloquium, Cambridge, England.
- Malone, M. E., Nier, C., & Yin, C. (2010, April). *Promoting assessment literacy for language educators and learners: Challenges, approaches and practices*. Poster presentation at the 32nd Language Testing Research Colloquium, Cambridge, England.
- Nier, V., Di Silvio, F., Malone, M. E., Hassan, W., & Reed, D. (2010, April). *Assessment resources for Arabic students and instructors*. Paper session presented at the annual conference of the National Council of Less Commonly Taught Languages, Madison, WI.
- Jackson, F., Nier, V., & Malone, M. E. (2010, March). *U.S. Foreign Language Policies and Federal Funding Patterns*. Paper presentation at the annual conference of the American Association for Applied Linguistics, Atlanta, GA.
- Malone, M. E., Montee, M., & Yin, C. (2010, March). *The TOEFL Internet-based Test: User beliefs about academic tasks*. Paper presentation at the annual conference of the American Association for Applied Linguistics, Atlanta, GA.
- Montee, M., Amoroso, L., & Malone, M. E. (2010, March). *Students Beliefs about Academic Tasks on the TOEFL Internet-based Test*. Paper presentation at the annual conference of the American Association for Applied Linguistics, Atlanta, GA.
- Malone, M. E. (2009, July). *Understanding Assessment for Instructors of Less Commonly Taught Languages*. A Workshop Presented at the University of Pennsylvania STARTALK Program for Teachers of Hindi, Philadelphia, PA.
- Malone, M. E. (2009, February). *The Simulated Oral Proficiency Interview*. Introduction to Pennsylvania Modern Language Association SOPI Workshop, Chestnut Hill, PA.

ADVISORY POSITIONS

- Secretary, *International Language Testing Association*, 2011–present
 Co-Chair, *Language Testing Research Colloquium*, 2009
 Co-Chair and Founder, *East Coast Organization of Language testers*, 2002–present
 Nominations Committee, *International Language Testing Association*, 2007, 2009, Chair 2009
 Advisory Board Member, *Language Acquisition Resource Center*, 2006–present
 Advisory Board Member, *The George Washington University Language Center*, 2005–2008

PROFESSIONAL AFFILIATIONS

- International Language Testing Association
 American Association for Applied Linguistics
 American Council on the Teaching of Foreign Languages
 Teachers of English to Speakers of Other Languages
 National Council of Less Commonly Taught Languages

LANGUAGES

- Spanish (intermediate); Sanskrit (novice reading); Latin (intermediate reading); Indonesian (novice)

Margaret E. Malone, Center for Applied Linguistics

David MacGregor

(b)(6)

Education

Georgetown University, Washington, DC

Ph.D., Linguistics (2007)

Dissertation title: "It Really Wonders Me: The Relationship Between Causatives and Intransitives in English"

Advisor: Dr. Andrea Tyler

Committee members: Dr. Michael Israel, Dr. Paul Dudis

School for International Training, Brattleboro, VT

Master of Arts in Teaching, double concentration in EFL and Spanish (1995)

University of Chicago, Chicago, IL

Bachelor of Arts, Linguistics

Work Experience

2006-2007 **Coordinator, Quantitative Research Team, Center for Applied Linguistics,**
Washington, D.C.

2000-2006 **Research Assistant, Center for Applied Linguistics, Washington, D.C.**

1998-2000 **Research Assistant, National Capital Language Resource Center, Washington, D.C.**

1995-1998 **ESL Instructor, Virginia Tech English Language Institute, Blacksburg, VA.**

1987-1994 **Various ESL, EFL and Spanish Teaching Positions in Turkey, Spain and the USA**

List of Test and Test Materials Projects at CAL (Selected)

WIDA ACCESS Project: Development and Annual Renewal of K-12 English Language Proficiency Tests (ACCESS for ELLs®) for a Multi-state Consortium, Associate Manager for Psychometrics/Research, Member WIDA Management Team

Webtest, develop an online listening and reading test in Arabic and Russian, Project Coordinator.

The Oral Proficiency Test, develop an online speaking test for professionals in Chinese and Korean, Project Coordinator.

The Foreign Language Test Database, develop an interactive online database of foreign language assessments.

Publications (Selected)

Kenyon, D., MacGregor, D. , Li, D., and Cook, H.G. (In preparation). Issues in Vertical Scaling of English Language Proficiency Tests: The Case of WIDA ACCESS for ELLs®.

Carpenter, H., Jeon, S., MacGregor, D., and Mackey, A. (2006). Learners' Interpretations of Recasts. *Studies in Second Language Acquisition* 28, 209-236.

Malone, M. E., and MacGregor, D. (2005). Foreign language assessment database. In Rosenbusch, M. H. (Ed.), *New visions in action: National assessment summit papers*. Ames, Iowa: National K-12 Foreign Language Resource Center.

MacGregor, D. (2004). Real Space Blends in Spoken Language. *Gesture* 4:1, 75-89.

Falcon, S., MacGregor, D. y Sanz, C. 2001. Is Killing Two Birds with One Stone Possible? Explicit Instruction on Spanish Word Order and the Spread of Knowledge. *Revista E/LE*. Madrid: Espasa.

Winke, P., and MacGregor, D. (2001). Review of *Hot Potatoes* (Stewart Arneil, Martin Holmes, & Hilary Street). *Language Learning and Technology* 2, 5, 28-33.

MacGregor, D. (2000). ERIC/CLL Resource Guides Online: Second Language Proficiency Assessment. ERIC Clearinghouse on Languages and Linguistics (<http://www.cal.org/ericcll/faqs/rgos/assessment.html>).

Recent Presentations (Selected)

MacGregor, D. & Kenyon, D. (2010, March). Academic language of the content areas and general academic language. Paper presented in colloquium (B. Mohan, C. Chapelle, orgs.), Linguistic bases for construct definition in tests of academic language ability at the annual meeting of the American Association of Applied Linguistics (AAAL), Atlanta, GA.

Bauman, J., Wright, L., MacGregor, D., Spokane, A., and Montee, M. The discourse of assessments: Addressing linguistic complexity in content and English language proficiency tests through linguistic analyses. Symposium presented at the annual meeting of the Language Testing Research Colloquium, March 17-20, 2009, Denver, CO.

Römhild, A., Kenyon, D., & MacGregor, D. (2009, March). *Assessing domain-general and domain-specific academic English language proficiency*. Paper presented at the annual meeting of the Language Testing Research Colloquium (LTRC), Denver, CO.

MacGregor, D., Tyler, A., Fujii, A., Takada, M., Liamkina, O., Jeon, S., and Kupcinkas, D. Over again: An experimental investigation part 2. Paper presented at the 8th International Cognitive Linguistics Conference, July 20-25, 2003, Logroño, Spain.

MacGregor, D., Kenyon, D., Christenson, J. (2008, March). *Predicting item difficulty: A rubrics-based approach*. Paper presented at the annual meeting of the American Association of Applied Linguistics (AAAL), Washington, DC.

Römhild, A., Kenyon, D., & MacGregor, D. (2008, March). *Assessing academic English language proficiency: Clarifying the construct*. Paper presented at the annual meeting of the American Educational Research Association (AERA), New York, NY.

Kenyon, D., Cho, B., & MacGregor, D. (2007, June). *Testing academic language or academic content? An exploration using CFA*. Paper presented at the 29th Language Testing Research Colloquium (LTRC), Barcelona, Spain.

MacGregor, D., Louguit, M., Malone, M., and Kenyon, D. Developing Arabic and Russian web-delivered listening and reading tests. Poster presented at the annual meeting of the Language Testing Research Colloquium, July 22-25, 2005, Ottawa, Canada.

WestEd
Organizational Capacity Description

WestEd is a preeminent educational research, development, and service organization with 600 employees and 17 offices nationwide. WestEd has been a leader in moving research into practice by conducting research and development (R&D) programs, projects, and evaluations; by providing training and technical assistance; and by working with policymakers and practitioners at state and local levels to carry out large-scale school improvement and innovative change efforts. The agency's mission is to promote excellence, achieve equity, and improve learning for children, youth, and adults. In developing and applying the best available resources toward these goals, WestEd has built solid working relationships with education and community organizations at all levels, playing key roles in facilitating the efforts of others and in initiating important new improvement ventures.

Since 2000, WestEd has carried out over 4,000 successful projects representing major contributions to the nation's R&D resources, and has from 450 to 700 active contracts and grants at any given time. Current work extends beyond the western region to include most states in the nation and an increasing number of other countries. In FY 2011, the agency is expecting to operate on program funding of approximately \$117 million. Funding for specific projects comes from sources including the U.S. Department of Education (ED), National Science Foundation, and U.S. Department of Justice; state departments of education; and universities, school districts, foundations, and other state and local agencies across the country. WestEd has also been vetted and approved as a qualified service provider in the following federal contracting programs: the U.S. Department of Education Streamlined Acquisition Tool (ED-SAT), the U.S. Department of Health and Human Services Program Support Center (PSC) Task Order Contracts, and the General Service Administration's Mission Oriented Business Integrated Services (MOBIS) Schedule. This large variety of funding sources provides WestEd with a stable funding base and hence a stable organizational structure for supporting the work of this proposal.

WestEd's mission—to work with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults—is addressed through a full range of projects. Figure 1 indicates how WestEd's core work is distributed by type of R&D activity (based on the FY2010 project sample survey). Figure 2 displays the distribution by target level of education served.

To carry out this mission, WestEd project staff are organized into a dozen formal program areas—some addressing educational content or level and some in areas of high risk and high need that cut across content. Areas of work include Assessment and Accountability; Mathematics and Science; School and District Improvement; English Learners; Special Education; Early Childhood; Leadership and Teacher Professional Development; Curriculum and Instruction; Literacy; Evaluation; Healthy Kids, Schools, and Communities; Web, Database, and Interactive Services; Policy; Culture, Diversity, and Equity; and Secondary and Postsecondary Education. Across programs, WestEd boasts expertise in balanced assessment

systems, accountability, curriculum development, teacher professional development and training, data-driven planning, school coaching, community partnership building, research and evaluation methods, and policy analysis. All areas have high relevance and value to supporting the work of this proposal.

Figure 1. WestEd Work Type of Activity (2010)

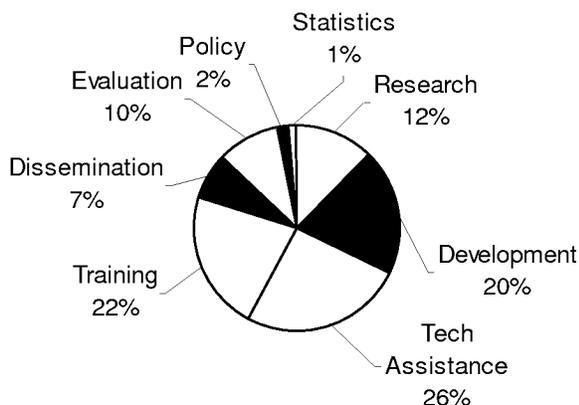
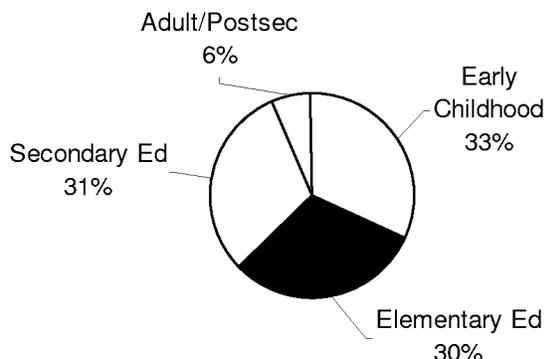


Figure 2. WestEd Work Level of Education (2010)



WestEd: Examples of Current Relevant Work

Current WestEd work of particular relevance to the proposed scope of work includes the following. WestEd serves as Project Management Partner (PMP) for the SMARTER Balanced Assessment Consortium (SBAC). As PMP, WestEd staff provide their substantive and managerial expertise and experience to helping SBAC states bridge research and practice to address critical issues related to the quality, validity, reliability, and fairness of large-scale, balanced assessment systems. This work includes consideration of research and practice related to innovative and accessible test designs and item types intended to more meaningfully measure a fuller range of what students know and can do, as well as technology approaches intended to facilitate more accurate measurement of students’ knowledge, skills, and abilities. Influencing SBAC discussions about item and test design, technology approaches, and assessment administration, for example, are considerations of special student populations, such as English language learners, which is a population that WestEd has a long history of serving through standards and assessment development, teacher professional development, research, and policy (details of specific projects are available upon request). Therefore, similar to the capacity with which WestEd serves SBAC, WestEd offers the proposed consortium its expertise and experience to help ensure that the outcomes of the proposed work for this grant will be, to the extent possible and appropriate, compatible and coherent with states’ student assessment systems.

WestEd also is working in a number of states to support their transition to and implementation of the Common Core State Standards (CCSS). Collectively, WestEd’s on-staff and extensive consultant network include content experts in English language arts (including the CCSS) and English language acquisition. This particular combination of expertise, combined with extensive experience in standards, assessment, curriculum, and research, makes WestEd a highly-qualified and well-rounded partner to the consortium that is uniquely suited to support

and carry out proposed tasks to a superior level of quality. Through our role as lead agency of the Assessment and Accountability Comprehensive Center (AACC), WestEd provides technical assistance and consultation to states, directly or through the regional comprehensive centers, in areas that include the assessment and accountability of English language learners and students with disabilities, data use, and systems of support. The AACC led the development of the federally-supported *Framework for High-Quality English Language Proficiency Standards and Assessment*, which is recognized and used in numerous states for engaging state educators and their partners in high-quality English language proficiency standards and assessment practices.

Web-based Applications

WestEd uses the Web to encourage collaboration among education organizations and to increase information and product dissemination. Communications staff work closely with WestEd's technology staff to publish documents; provide connections to outside resources; and communicate, obtain feedback, and enable participation in a variety of electronic activities (e.g., conferencing and distance learning). WestEd's website is continually updated to reflect the latest work and research of the various programs and projects. It has won recognition for its reliability, ease of navigation, accessibility, and overall effectiveness in sharing information with clients.

WestEd's intranet is a robust repository of information complete with interactive forms for many of the agency's business processes, communication structures for the agency, and 50 additional private communities for department and project-specific collaboration. The technology staff have built a range of data collection forms and review processes, including timesheets, travel authorizations, hiring requests, job postings and applicant screening, proposal and contract management, processes to maintain staff data, and other administrative functions. Also available are email, agency and workgroup calendars, online file cabinets and resource libraries, and web-based discussion groups. Intranet development activities help to widen the knowledge base of development staff, which is applied to their project-based development activities.

WestEd Interactive (WEI)—the agency's application, web, and media development group—coordinates the planning, development, and implementation of web-based application services to a wide variety of WestEd projects as well as external clients. Creating and designing databases, web communities, web dialogues, and interactive online learning, WEI has provided support to over 120 projects over the past seven years. WEI staff offer clients a range of expertise in strategic planning, community development, media and content development, e-Learning, and application development.

With a focus on usability and customization, WEI provides a variety of services and products to meet the complex, evolving needs of the education community. For example, WEI developed the Plan and Monitoring Tracker (PMT), a customizable web-based tool currently used by several states for both compliance monitoring and school- and district- improvement planning. Through this efficient, secure platform, LEAs and SEAs can share and report a variety of essential data and information.

WEI also works strategically with clients to create, host, and facilitate a variety of online learning and interaction. WEI-produced webinars are a cost-effective mode of synchronous, online group communication. Past sessions have included everything from small, highly interactive professional development trainings, to large, lecture-style forums.

WebDialogues are another WEI-produced platform for interactive online discussions. These orchestrated discussions take place over one or more days and involve policy-makers, subject experts, educators, students, and the interested public. WebDialogues can accommodate thousands of participants focused on a well-defined agenda that includes specific discussion points, balanced library resources, and a panel of experts. For example, LegiSchool—a civic education collaboration between California State University, Sacramento and the California State Legislature—uses WebDialogues as a platform for legislators and high school students to discuss issues relevant to California youth.

WEI's work has also resulted in the EdGateway initiative, which serves as an application service provider (ASP) to both WestEd projects and clients, including ED, the California State Department of Education, the U.S. Environmental Protection Agency, the Coalition for Essential Schools, National Aeronautics and Space Administration (NASA), and the National Writing Project. The EdGateway environment provides projects with the ability to create communities of users who can share information, participate in discussions, exchange event information, access and update resource directories, distribute electronic newsletters, and organize and publish conference schedules.

One of WestEd's most important initiatives is SchoolsMovingUp, a website designed to help schools and districts nationwide raise student achievement in low-performing schools. This interactive site provides practitioners with high-quality resources, proven services, and powerful tools that support school improvement and student learning. Resources include profiles of schools from across the country that have improved student achievement; easily implemented or replicated school and district tips to assist in school improvement efforts; and articles, books, and abstracts offering practical ideas and models for school improvement. Frequent online events bring experts and nationally-known speakers to the Web to share lessons learned, new ideas, and related resources. In addition, SchoolsMovingUp offers practical information about the No Child Left Behind Act.

Information Technology

WestEd maintains a complex, diverse, and secure computing infrastructure. WestEd's Information Services (IS) Department employs the latest hardware and software technology to offer network and desktop services supporting the work of a variety of projects. WestEd IS provides support to staff throughout all of our offices, as well as enabling remote and mobile computing capabilities.

WestEd operates industry-standard network devices for communications, file sharing, email, database applications, videoconferencing, and financial and accounting applications. Webhosting capabilities are offered at our colocation facility, as well as through relationships with third-party providers known as industry leaders. WestEd's facilities maintain organizational, project, and client websites on a series of servers configured to provide reliable access and consistent performance. Systems are housed at state-of-the-art facilities, providing high-speed backbone connections, backup systems, and 24x7 security. Distribution of our servers at multiple facilities with redundant network connections ensures failover and disaster recovery.

Due to our work with sensitive data and critical network systems and applications, WestEd implements a range of security procedures to maintain network and data security. Through the use of tools such as virtual private networks, network firewalls, centralized secure servers, antivirus applications, deniable file systems, and multi-factor authentication, the WestEd IS team keeps data secure and network systems operating as intended.

Multimedia Equipment, Facilities, and Resources

Many agency projects and programs are engaged in directly providing services to practitioners. The use of multimedia presentations facilitates information dissemination and improves the quality of the services provided. The agency has invested in multimedia equipment both for delivering services and for developing products.

WestEd has videoconferencing facilities at its San Francisco headquarters and Boston, Burlington, Los Alamitos, Phoenix, Oakland, Redwood City, Sacramento, Sausalito, and Washington DC offices to enable staff and clients to communicate face-to-face. WestEd utilizes extensive telecommunications facilities including an integrated voice messaging system with direct telephone dialing and data links among 10 WestEd offices: Burlington, Boston, Los Alamitos, Oakland, Phoenix, Redwood City, Sacramento, Sausalito, San Francisco, and San Jose.

WestEd maintains an Avid video production suite and a second digital video production suite using a variety of equipment. Several programs are experienced in developing videos for training and dissemination purposes. Production is enhanced by working with partners and consultants who have expertise in innovative uses of technology, including CD-ROM production, and access to multimedia production equipment and other facilities. WestEd staff use videocassette recorders (VCRs), data projectors, video cameras, and audio equipment regularly in their work.



SUMMARY OF RELATED EXPERIENCE

Robert Linquanti is Project Director for English Learner Evaluation and Accountability Support (ELEAS) and Senior Researcher at WestEd, specializing in assessment, evaluation and accountability policies, practices and systems for English Learners. He works with several states and districts to analyze ELs' English language proficiency and academic achievement, and develop or revise policy for implementing ESEA Title III. He also leads WestEd's collaboration with the California Department of Education and regional service providers to deliver a statewide system of technical assistance for school districts identified under Title III as needing to improve educational services and outcomes for ELs. He regularly advises the US Department of Education, US Congressional staff, and the National Research Council on assessment and accountability policy and practices related to ELs. He has also taught as invited faculty at the Aspen Institute and Stanford University. Linquanti has published and presented widely on evaluating EL education policies, EL assessment and reclassification, and improving accountability and equity for ELs. He serves on several expert panels and state and foundation advisory boards related to EL issues, and is a convening member of the national Working Group on ELL Policy.

EDUCATION

- 1988 M.P.A., Public Policy Analysis, Columbia University
(Columbia Public Service Fellow, 1986–1988)
- 1984– Graduate studies, Spanish Linguistics, University of Madrid (La Complutense),
1985 Madrid, Spain
- 1982 B.A. (*summa cum laude*), English and Spanish Linguistics and Literature,
State University of New York (SUNY) at Buffalo

PROFESSIONAL EXPERIENCE

- 2003– *Project Director*, ELEAS - Comprehensive School Assistance Program,
Present and *Senior Research Associate*, Western Regional Educational Laboratory,
WestEd, San Francisco, CA

Direct projects in EL evaluation and accountability support, which build and sustain client capacity and internal accountability for EL success. Examples include:

- Assist states education agencies (e.g., California, Iowa, Louisiana, New York, North Carolina, Texas, West Virginia) to analyze EL language proficiency data and develop state policy for implementing or modifying NCLB Title III annual measurable achievement objectives (AMAOs)

- As part of national Title III evaluation, co-lead exploratory study of empirical methods for use in setting state ELP performance standards and operationalizing ELP and academic progress expectations and accountability criteria.
- Provide research, consultation and technical assistance on policy development, analysis, and implementation to the US Department of Education Office of Elementary and Secondary Education, Office of Policy Evaluation and Program Development, and Office of English Language Acquisition on state ESEA Title I and Title III policy issues related to ELs, and ESEA reauthorization.
- Co-develop and deliver statewide technical assistance with California Department of Education and regional service providers to help districts improve services & outcomes for EL students under NCLB Title III (for California Comprehensive Center at WestEd)
- Co-direct project with Los Angeles Unified School District, the nation's largest EL-enrolling school district, to develop English learner program evaluation system, and redesign English Learner Master Plan.
- Provide technical assistance to California districts to build capacity, systems, & practices to analyze EL language proficiency and academic achievement data; identify issues; set goals, monitor progress, and plan professional development
- Conduct research and evaluation studies for California policymakers and educational leaders on impact of state EL policies (e.g., growth expectations in English-language proficiency; Proposition 227; reclassification of English learners), and on EL accountability practices
- Assist Council of Chief State School Officers (CCSSO) to review Title III non-regulatory guidance for USDE OELA; conduct quality review of CCSSO K-2 English Language Development Assessment; advise member states on Title III AMAO accountability issues; advise on methods for aligning instruction to standards and assessments for English Learners and analyzing relationship to student achievement

2000-
2006 *Associate Director*, Evaluation Study of Proposition 227, American Institutes for Research and WestEd, Palo Alto and Oakland, CA

Helped direct legislatively-mandated, five-year study of effects of Proposition 227 on California's 1.6 million K-12 EL students. Resolved methodology and policy issues; guided data analyses & interpretations; managed WestEd field research staff; co-authored annual reports; provided testimony to state legislature & policymakers.

1995-
2002 *Senior Research Associate*, Northern California Comprehensive Assistance Center and Western Regional Educational Laboratory, WestEd, San Francisco, CA

Conducted evaluation research and provided technical assistance to state and local educational leaders and policy makers in California, Arizona, Nevada, and Utah on issues affecting English acquisition and academic success of language-minority students.

- 1992– *Research and Evaluation Associate*,
1994 Far West Laboratory for Educational Research and Development, San Francisco, CA
- 1989– *Senior Project Consultant*, Production and Technology Planning Group
1991 U.S. Leasing International, San Francisco, CA
- 1985– *Senior Program Administrator*, English and Special Services Division
1987 Institute of International Education, New York, NY
- 1984– *Professor of English as a Second Language*
1985 United States Cultural Center, Madrid, Spain
- 1982– *Assistant Director for International Student Services and Lecturer in ESL*, Intensive
1984 English Language Institute, State University of New York, Buffalo, NY

SELECTED PUBLICATIONS AND REPORTS

- Linquanti, R. (2011). Strengthening assessment for English learner success: How can the promise of the common core state standards and innovative assessment systems be realized? In D. Plank and J. Norton (Eds.), *The road ahead for state assessments* (pp. 13-25). Palo Alto & Cambridge: Policy Analysis for California Education and Rennie Center for Education Research & Policy.
- Linquanti, R., Crane, E., & Huang, M. (forthcoming). *Examining growth in English language proficiency of California's English learners* (Issues & Answers Report). Washington, DC: US Department Of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory West.
- Linquanti, R. (2008). Assessing language proficiency of California's English learners and what it means for accountability. Invited essay. *University of California Linguistic Minority Research Institute Newsletter*, 17 (2), 1-3.
- Linquanti, R. & George, C. (2007). Establishing and utilizing an NCLB Title III accountability system: California's approach and findings to date. In J. Abedi (Ed.), *English language proficiency assessment in the nation: Current status and future practice* (pp. 105-118). Davis: University of California.
- Williams, T., Hakuta, K., Haertel, E., Kirst, M., Levin, J., Linquanti, R., et al. (2007). *Similar English Learner students, different results: Why do some schools do better? A follow-up analysis, based on a large-scale survey of California elementary schools serving low-income and EL students*. Mountain View, CA: EdSource.
- Linquanti, R., Carstens, L., & Soto-Hinman, I. (2006). *NCLB Title III institute: Ensuring academic success for English learners*. (Workbook to the two-day professional development series, sponsored by California Department of Education). San Francisco: WestEd.

Parrish, T., Merickel, A., Perez, M., Linqunti, R., et al. (2006). *Effects of the implementation of Proposition 227 on the education of English learners, K-12: Findings from a five-year evaluation (final report)*. Palo Alto and San Francisco: American Institutes for Research and WestEd.

Linqunti, R. (2001). *The redesignation dilemma: Challenges and choices in fostering meaningful accountability for English learners*. Policy Report 2001-1. Santa Barbara: University Of California Linguistic Minority Research Institute.

Linqunti, R., Bailey, J., Lentz, R., & Pasta, D. (2000). *Factors affecting the time interval to redesignation of English language learners: An exploratory study*. (OBEMLA-USDE Field-Initiated Research Grant.) San Francisco, CA: WestEd.

Linqunti, R. (1999). *Fostering academic success for English language learners: What do we know?* San Francisco, CA: WestEd.

SELECTED PRESENTATIONS AND TESTIMONY (2009-PRESENT)

Linqunti, R. (April, 2011). *Fostering meaningful accountability for English language learners: What will it take?* Invited presidential session at the Annual Meeting of the American Educational Research Association, New Orleans, LA.

Roberts, L., & Linqunti, R. (December, 2010). *California English Language Development Test and Title III accountability: Updates and implications for 2010-11*. Invited presentation at the California Department of Education 11th Annual Accountability Leadership Institute for English Learner and Immigrant Students, Burlingame CA.

Linqunti, R., & Mayer, J. (November, 2010). *Using CELDT data to inform local improvement efforts for English learners*. Invited session at the California Educational Research Association Annual Conference, San Diego, CA.

Linqunti, R. (November, 2010). *Fostering educational equity for California's English learners: An imperative for collaboration among K-12 & post-secondary researchers*. Keynote address at the annual conference of California Association for Institutional Research, San Diego, CA.

Linqunti, R. (June, 2010). *Thoughts on the implications of common core state standards for English-language learners*. Invited symposium presentation at the CCSSO National Conference on Student Assessment, Detroit, MI.

Linqunti, R. (May, 2010). *Maximizing meaningful inclusion of English-language learners on NAEP: Report of the Technical Advisory Panel on Uniform National Rules for NAEP testing of ELLs*. Symposium panel presentation presented at the Annual Meeting of the American Educational Research Association, Denver, CO.

- Linquanti, R. (April, 2010). *Issues to consider with innovative assessments: How will English-language learners participate?* Invited presentation to the National Research Council Center for Education/Board on Testing and Assessment Best Practices Workshop for State Assessment Systems, presented at the National Academy of Sciences, Washington DC.
- Linquanti, R. (January, 2010). *Implications of common core state standards for English-language learners.* Invited presentation to the Aspen Senior Congressional Education Staff Network, presented at the Aspen Institute, Washington DC.
- Linquanti, R. (December, 2009). *Strengthening the signal: Thoughts on leveraging Race to the Top Assessment Program to improve outcomes for English-language learners.* Expert panel presentation delivered at the US Department of Education Race to the Top Assessment Program Public & Expert Input Meeting, Denver, CO.
- Linquanti, R. (April, 2009). *NCLB at year 8 in the assessment of English Language Learners: Taking stock of the assessment and accountability systems.* Invited discussant, National Association of Test Directors/NCME Joint Invited Symposium, presented at the Annual Meeting of the National Council on Measurement in Education, San Diego, CA.
- Linquanti, R., & George, C. (April, 2009). *Moving targets: Adjusting California's NCLB Title III accountability system and analyzing its impact on educators and students.* Symposium paper presented at the Annual Meeting of the American Educational Research Association, San Diego, CA.

SELECTED EXPERT PANELS AND PROFESSIONAL ACTIVITIES

- Member, California Department of Education Technical Advisory Group (TAG) on the California English Language Development Test (CELDT) Program, 2003-present
- Member, Texas State Assessment Technical Advisory Committee (2011-13)
- Convening member, National Working Group on ELL Policy (2009-present)
- Member, National Research Council Panel to Review Alternative Data Sources for the Limited English Proficiency Allocation Formula under Title III, Part A, Elementary and Secondary Education Act, 2009-10
- Member, Technical Advisory Panel on Uniform National Rules for NAEP Testing of English Language Learners, 2009-10
- Lecturer, Stanford University School of Education, 2008-2010

PROFESSIONAL AFFILIATIONS

- American Educational Research Association
- National Council for Measurement in Education



[REDACTED]

[REDACTED]

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SELECTED PRESENTATIONS

Walqui, A. (2011) AERA Vice-Presidential Session: Research for the Public Good: Multiple Partners, Multiple Perspectives, One Coherent Approach. Chair and Presenter: Quality Teaching for English Language Learners: Theory and Practice.

Walqui, A. (2011). AERA 2011 Presidential Session: Reconceptualizing Teaching with English Language Learners: Challenges and Promises. Part of a Symposium *Reconceptualizing our Instructional Methods, Assessments, and Accountability Systems to Ensure Success for English Language Learners*.

Walqui, A. (2009, April). *The development of multiple literacies with English language learners in two high schools*. Paper presented at the annual meeting of the American Educational Research Association, San Diego.

Walqui, A. (2009, April). *Evaluation of professional development programs: Methods used and challenges encountered*. Session chair for the annual meeting of the American Educational Research Association, San Diego.

Walqui, A. (2009, March). *Programs and instructional approaches for working with immigrant students*. Paper presented at the annual conference of the Association for Supervision and Curriculum Development, Orlando, FL.

Walqui, A. (2008, April). *Quality teaching for English language learners: What does principled practice entail?* Plenary presentation to the annual Teachers of English to Speakers of Other Languages (TESOL) Convention, New York, NY.

Walqui, A. (2007, October). *Apprenticing the academic uses of language: Middle school English language learners and their teachers*. Keynote presentation to the annual CREATE (Research Center for English Language Learners) Conference, Chicago.

Walqui, A. (2007, June). Literacy for adolescent English learners: Building capacity for quality programs. Paper presented at National High School Center Summer Institute, Washington, DC.

Walqui, A. (2007, April). Becoming what we are not yet: The development of teacher expertise to work with adolescent English learners. Paper presented at the annual meeting of the American Educational Research Association, Chicago.

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SUMMARY OF RELATED EXPERIENCE

Edynn Sato is the Director of Research and English Learner Assessment in the Assessment and Standards Development Services (ASDS) program at WestEd and the Director of Special Populations for the Assessment and Accountability Comprehensive Center, a federally designated national center that provides technical assistance in the areas of assessment and accountability to regional centers and state departments of education. Her areas of focus include the design and development of assessments (formative, summative) for general education and English learner students, as well as for students with disabilities; alignment, linkage, and crosswalk analyses of standards and assessments for general and special student populations, including analysis of the Common Core State Standards; research on the technical aspects of assessments (i.e., validity, reliability, bias); frameworks for standards and assessment development and implementation; and emerging areas of research (e.g., academic language, access, accommodations for English learners) and their implications for assessment practice and policy.

Dr. Sato also [REDACTED] compliance with the law (e.g., No Child Left Behind Title I, Title III) [REDACTED].

Prior to joining WestEd, Dr. Sato worked in various academic, nonprofit, small for-profit, Fortune 500, and Internet-based organizations. Her previous roles include Development Supervisor at CTB/McGraw-Hill, overseeing the development of several statewide customized standardized assessments and ancillary materials; researcher at UCLA's Center for the Study of Evaluation/CRESST, involved in various evaluation projects and in the research and development of performance-based assessments in English, language arts, and social studies, as well as assessments related to language development; Director of Education and Measurement at eSCORE.com, managing the development and implementation of online assessments and educational content for students in grades 2–8, as well as child development and motivation content for parents; Program Developer at SCORE! Education Centers, creating educational products and programs targeting at-risk, urban students in grades K–12; lecturer in the College of Education at San Jose State University, teaching courses on assessment and evaluation as well as on the psychological foundations of education; and Executive Editor at LeapFrog SchoolHouse, overseeing the content development of a technology-based interactive product for students in grades K–5 that integrated formative assessment and differentiated instruction. She also founded her own consulting company, focusing on product evaluation and assessment design and development.

EDUCATION

- 1996 Ph.D., Education, with a specialization in Educational Psychology and sub-specialization in Applied Linguistics, University of California, Los Angeles, CA
- 1990 M.A., Education, with a specialization in Educational Psychology, University of California, Los Angeles, CA
- 1988 B.A., Multidisciplinary Studies (Elementary Education), with an English minor, Santa Clara University, Santa Clara, CA

PROFESSIONAL EXPERIENCE

- 2004– Present *Director, Research and English Language Learner Assessment,* (ASDS), and *Director, Special Populations, Assessment and Accountability Comprehensive Center,* WestEd, San Francisco, CA
- Serves as a member of the senior management team for ASDS, contributing to administrative decisions, business strategy, program planning, and direction. Oversees, in particular, the research and applied research activities in ASDS, establishing a research agenda, leading resource development efforts, and developing and growing its portfolio of work that focuses on issues related to standards, assessment, and accountability (e.g., access, accommodations, academic language, technical adequacy of assessments, alignment, linkage, and crosswalk analyses). Provides consultation to state departments of education and other educational organizations on the design, development, and implementation of standards and assessments (formative, summative), and systems that impact, in particular, special student populations. Serves as a technical advisor in the development of standards and high-stakes state assessments for general and special student populations. Manages multiple project budgets ranging from less than \$100,000 to multimillions of dollars. For the Assessment and Accountability Comprehensive Center at WestEd, provides technical expertise and support to regional comprehensive centers and states in the areas of assessment and accountability, particularly as they relate to supporting special student populations.
- 2003– 2004 *Executive Editor*
LeapFrog, Emeryville, CA
- For the LeapFrog SchoolHouse division, led the conceptualization, specification, and design of assessment and curricula for LeapTrack, a technology-based product that integrates formative assessment and differentiated instruction for students in grades K–5 in English language arts and mathematics. Oversaw data collection and reporting related to LeapTrack materials.
- 2002– 2004 *Lecturer,* College of Education
San Jose State University, San Jose, CA
- Taught Evaluation and Psychological Foundations courses for single-subject teacher credential candidates. Aligned instructional activities with professional standards and the university’s mission of preparing educators who have the knowledge, skills, dispositions, and ethics that ensure equity and excellence for all students in a culturally diverse, technologically complex global community.
- 2002– 2004 *Founder and Consultant*
Achievement Gains, LLC, San Bruno, CA
- Conducted research and provided consultation in the areas of assessment and evaluation. Clients included Educational Testing Service, McDougal-Littell, WestEd, Pacific Metrics Corporation, Edusoft Inc., and Learnimation, LLC.
- 2000– 2002 *Senior Research Associate,* Comprehensive School Assistance Program
WestEd, Oakland, CA
- Provided technical assistance to county offices of education, district offices, and schools. Worked with teachers and administrators in high-poverty, underperforming schools on their schoolwide reform efforts to become high-achieving schools. Helped schools develop an infrastructure and build site-based capacity to support ongoing schoolwide improvement in the areas of curriculum, instruction, assessment, evaluation, and professional development. Advised schools/school districts on assessment and accountability systems to better accommodate typically underserved

student populations (e.g., Title I students, language learners, migrant education students). Developed and provided schools with professional development/resource materials and technical support on standards-based instruction. Built the capacity of and provided support to school and district leaders in data analysis and interpretation to inform and support school reform decisions.

1998–
2000 *Founding Member, Director of Education and Measurement, Program Developer*
Kaplan Inc. (subsidiaries), New York, NY, and Oakland and San Francisco, CA

1999–
2000

Founding member of a content-rich online education company providing resources in child development and motivation to parents and in reading and mathematics to children in grades 2–8. Managed research, development, and evaluation of educational products and services. Managed development of online assessments and educational content and services. Performed competitive analyses. Hired and managed full-time staff, independent contractors, and resources.

1998–
1999

Managed the development and production of educational programs for at-risk urban students in grades K–12 in the areas of reading, language arts, mathematics, study skills, and motivation. Developed training/professional development materials for teachers. Conducted needs analyses. Facilitated advisory committees. Hired and managed full-time staff, independent contractors, and resources.

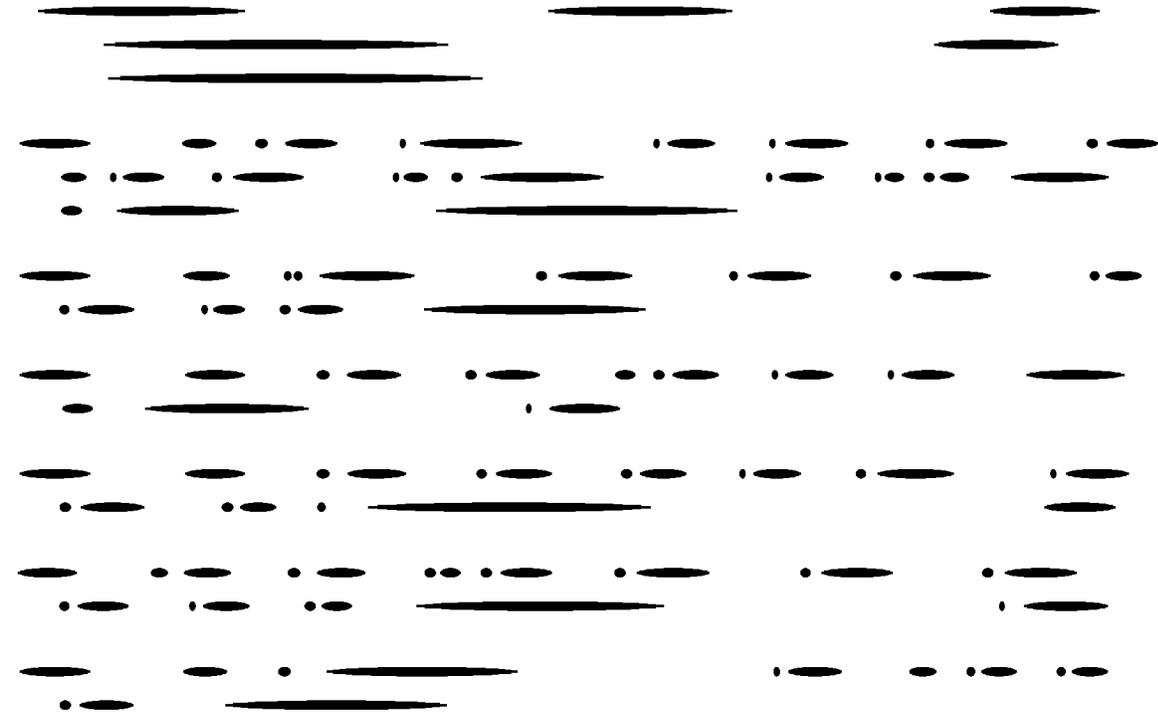
SELECTED PUBLICATIONS AND CONFERENCE PRESENTATIONS

[Redacted text]

Bailey, A., Butler, F., & Sato, E. (2007). Standards-to-standards linkage under Title III: Exploring common language demands in ELD and science standards. *Applied Measurement in Education*, 20 (1).

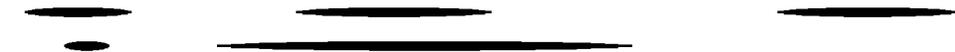
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Rabinowitz, S., & Sato, E. (2006). *The technical adequacy of assessments for alternate student populations: Guidelines for consumers and developers*. San Francisco, CA: WestEd.



Sato, E. (2003, March). *Differentiated standards-based instruction*. Presentation to the administration and staff at Steinbeck Middle School, San Jose, CA.

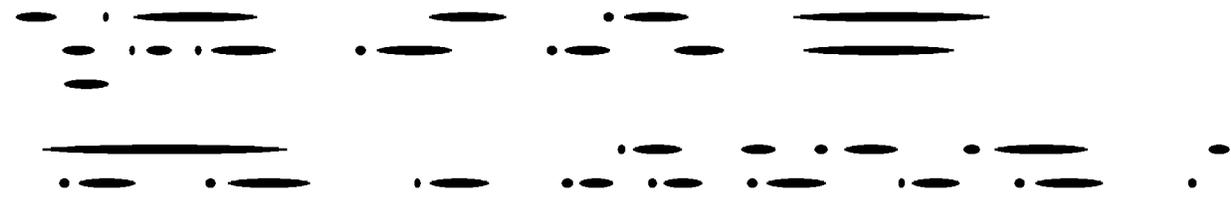
Sato, E. (2002, September). *Online database for school improvement*. Presentation made in collaboration with WestEd to administration and staff in the Gilroy Unified School District, Gilroy, CA.



Sato, E., Chartrand, A., & Lazarus, S. (in press). *Cross-study comparisons of findings related to states' AA-MAS: Implications for practice and policy* [working title]. San Francisco, CA: Assessment and Accountability Comprehensive Center, WestEd.



Sato, E., Moughamian, A., Lagunoff, R., Rayyes, N., Rivera, M., & Francis, D. (in press). *Access and opportunity to learn for English language learner students and students with disabilities*. San Francisco, CA: Assessment and Accountability Comprehensive Center, WestEd.



Accountability Comprehensive Center,

Assessment and

CONSULTATION AND OTHER PROFESSIONAL ACTIVITIES

- Advisory Board Member, Formative Assessment Language Records for English Language Learners (2009-present)
- Chair, Diversity Issues and Testing Committee, National Council on Measurement in Education (member 2009-present; chair beginning April 2011)
- Project Management Partner—Facilitator, SMARTER Balanced Assessment Consortium Accessibility and Accommodations Work Group (2010-present)
- Consultant, North Carolina Department of Public Instruction and its state educators on plain English and linguistic modification research and practice and implications for the development of its statewide assessments, March 2011 with ongoing support
- Consultant, Texas Education Agency and its state educators on accommodations and computer-based testing of English learners and implications for the development of the Texas' STAAR L prototype items, February 2011 with ongoing support
- Briefing, to White House, Senate, and House of Representatives staff on English language learner research and policy implications, April 2010
- Co-convenor, Madison Academic Language Work Group (2010-present)
- Planning committee member, National Conference on Student Assessment, Council of Chief State School Officers (2010-present)
- Reviewer, *Educational Assessment Journal*
- Reviewer, *Assessment for Effective Intervention Journal*

PROFESSIONAL AFFILIATIONS

- Associate member, English Language Learner State Collaborative on Assessment and Student Standards, Council of Chief State School Officers
- Member, American Educational Research Association
- Member, National Council on Measurement in Education

UCLA Graduate School of Education & Information Studies
Organizational Capacity Description

The UCLA Graduate School of Education & Information Studies (GSE&IS) includes two departments -- the Department of Education and the Department of Information Studies. Together, GSE&IS is dedicated to inquiry, the advancement of knowledge, the improvement of professional practice, and service to the education and information professions. We develop future generations of scholars, teachers, information professionals, and institutional leaders. Our work is guided by the principles of individual responsibility and social justice, an ethic of caring, and commitment to the communities we serve.

The GSE&IS also is home to a set of nationally recognized research enterprises, including the Higher Education Research Institute (HERI), generator of the Annual Freshman Survey of college students; the National Center for Research on Evaluation, Standards and Student Testing (CRESST), a leading research and policy group numbering more than 60 researchers at the UCLA site, dedicated to R&D on learning outcomes, performance, and educational quality; the Urban Education Studies Center (UESC) associated with the Seeds University Elementary School (UES), an on-campus laboratory focusing on practical problems of urban education for early childhood and elementary aged students, Center X, a group responsible for professional development and research in the areas of teaching, curriculum, and school organization; a strong Early Childhood and Family Center; and expanding enterprises in multimedia and information technology, policy, and international studies, and the Civil Rights Project/Proyecto Derechos Civiles, a center dedicated to research in support of more equitable social and educational outcomes for students who have been historically underrepresented in the nation's colleges and universities, and over-represented in the nation's lowest performing schools.

The School is especially proud of its commitment to the Los Angeles and broader communities of practice. Center X, UESC, and CRESST have on-going connections with major reform enterprises locally and nationally. GSE&IS also manages, with the support of the Anderson School, the School Management Program (SMP), where school personnel are trained in leadership to support their participation in the Los Angeles Unified School District Reform, LEARN. The GSE&IS is aided in policy and development by an external Board of Advisors.

In addition to faculty, the School employs senior research and professional staff to assist in the accomplishment of our mission. An excellent, although somewhat lean administrative staff, supports the GSE&IS community in technology, personnel and financial administration, development, student services, public information, as well as academic administration.

The School is housed into five major locations, Moore Hall, the GSE&IS Building in north campus, University Elementary School, portions of the Math/Sciences Building, and CRESST, in the Peter V. Ueberroth Building.

All these sites are connected to the GSE&IS Local Area Network, which is in turn connected to the campus backbone. The connections between Moore Hall, the GSE&IS Building, Math/Sciences, and UES, and between floors are all through Gigabit Ethernet switches, as is the connection to the campus backbone. Connections to desktop computers in Moore Hall are Gigabit Ethernet; Connections in GSE&IS Building are scheduled to move from 100 MB to Gigabit in the fall of 2007. The remainder of connections to desktop computers is 100 Mb. All connections to servers are Gigabit Ethernet. There are about 3000 Ethernet data ports (capable of at least 100 Mb) in all classrooms, offices, labs, and workspaces in all three sites. About 1500 of the ports are connected to computers or other network devices (mainly printers). Wireless access is available at all locations.

Of the 1500 devices, most are in faculty, administrative, and project/research offices or spaces, or in

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classrooms in UES. About seventy computers are located in various labs: 45 in two general purpose teaching and walk-in labs, 10 in an advanced analysis lab, and about 20 in an Information Studies lab. About 60 servers support various general purpose functions (email, web, listserv, directory services, print spooling, file serving, multimedia storage, streaming media, backups, database, DHCP, DNS) and special purpose project or research functions.

Support for the network infrastructure, services, and desktop systems is provided by a school-wide unit of 12 employees, along with about 5 more employees dedicated to particular units or projects. Housed in the support units are other technology resources, such as projection equipment, audio and video recording and editing equipment, and the like. These units also support classrooms, all of which have network ports, as well as overhead projectors, VCRs and television monitors.

Alison L. Bailey

ADDRESS:

(b)(6)

TELEPHONE:

EDUCATION:

Ed.D. Human Development and Psychology, November, 1995, Harvard University.

Dissertation title: *Oral Proficiency and Literacy in an Ancestral Language: Implications for Ethnic Identity.*

Ed.M. Human Development and Psychology, June, 1991. Harvard University.

Letteren Faculteit, August, 1989 - June, 1990. Katholieke Universiteit Brabant, Tilburg, The Netherlands.

B.A. (Hons), Linguistics, (Minor: American Literature), July, 1988, The University of Hull, England.

CURRENT ACADEMIC APPOINTMENT:

Professor, Department of Education, University of California, Los Angeles, July, 2009 - present.

RECENT GRANTS:

U.S .Dept. of Education (Oct., 2009 – Sept. 2011). Co-PI for *Evaluating the Validity of Language Proficiency Assessments* (Enhanced Assessment Grant).

The Gates Foundation (Dec., 2007 - Dec., 2009) Subcontract to Bailey from the Center for Equity and Excellence in Education, George Washington University. *Identifying the Academic Language Demands of Secondary Science and Mathematics Standards for ELLs.* (Role: Senior advisor and California lead). PI Charlene Rivera (CEEE/GWU).

Center for Community Partnerships (July, 2007 – Dec., 2009). PI for *Closing the Academic Language Gap for English Language Learners Transitioning from Pre-Kindergarten to Kindergarten.*

PUBLISHED BOOKS:

McCabe, A. K., Bailey, A.L., & Melzi. G. (Editors, 2008). Spanish-language

Narration and Literacy: Culture, cognition, and emotion. New York, NY: Cambridge University Press.

Bailey, A.L., & Heritage, M. (2008). Formative Assessment for Literacy, Grades K-6: Building reading and academic language skills across the curriculum. Thousand Oaks, CA: Corwin/Sage Press.

Bailey, A. L. (Editor, 2007). The Language Demands of School: Putting academic English to the test. New Haven, CT: Yale University Press.

RECENT PUBLISHED ARTICLES AND CHAPTERS:

Bailey, A.L. (forthcoming). Academic English. In J. Banks (Ed.) Encyclopedia of Diversity in Education. Thousand Oaks, CA: Sage.

Bailey, A.L., Huang, Y. & Escobar, M. (in press). Formative Assessment of Science and Academic Language Learning with Young English Language Learners: A Teacher-Researcher Collaboration. In P. Noyce & D. Hickey (eds.). Formative Assessment in Learning Contexts, the Next Generation. Harvard University Press.

Bailey, A. L. & Huang, B. H. (in press). Do current English language development/proficiency standards reflect the English needed for success in school? Language Testing.

Vu, J. A., Bailey, A.L. & Howes, C. (2010) Code-switching in Narrative Story-completion Tasks in Mexican-heritage Preschoolers. Bilingual Research Journal, 33, 200-219.

Bailey, A. L. (2010). Implications for Assessment and Instruction. In M. Schatz, & L. Wilkinson (Eds.). The Education of English Language Learners: Research to practice. Guilford Press.

Bailey, A. L. (2010). Assessment of Oral Language in School. In James, M. (Section Ed). International Encyclopedia of Education (Third Edition). Amsterdam: Elsevier.

Bailey, A. L. (2008). Assessing the language of young learners. In E. Shohamy & N. H. Hornberger (Eds.) Encyclopedia of language and education, Vol. 7: Language testing and assessment. (pp. 379-398). Berlin: Springer.

SELECTED TECHNICAL REPORTS, ASSESSMENT DEVELOPMENT AND MEDIA:

The PreLAS Observational Assessment for Three-Year-Olds. (In press). For CTB/McGraw-Hill.

Bailey, A. L. & Reynolds Kelly, K. (2010) The Use and Validity of Home Language Surveys in

- State English Language Proficiency Assessment Systems: A Review and Issues Perspective. EAG EVEA project deliverable. Available at <http://www.eveaproject.com/doc/HLS%20White%20Paper%202010.pdf>.
- Bailey, A.L. & Heritage, M. (2010). English Language Proficiency Assessment Foundations: External Judgments of Adequacy. EAG EVEA project deliverable. Available at www.eveaproject.com.
- Early Science and Language Learning at Para Los Niños. (June, 2010). Documentary produced with Larry Franzen and Yiching Huang. Funded by PLN/WIDA/UCLA. Available at http://www.paralosninos.org/pp/com.php/article/o/whats_new/oid/48.
- Bailey, A.L., Huang, Y., Osipova, A., & Beaugregard, S. (2010). A Teacher-Researcher Collaboration for the Academic Language and Science Learning of Young English Language Learners: Facilitating the Transition from Pre-Kindergarten to Kindergarten. California of Latino Superintendants Association. Available online at <http://calsa.schoolfusion.us>.
- Martinez, J-F., Bailey, A.L., Kerr D., Huang B. H.-H., & Beaugregard S., (2009/10). Measuring Opportunity to Learn and Academic Language Exposure for English Language Learners in Elementary Science Classrooms. IES PR/Award Number R305A050004. (Currently available as CSE Tech. Report No. 767). Los Angeles: University of California, National Center for Research on Evaluation, Standards, and Student Testing (CRESST).
- Wolf, M. K., Herman, J., Bachman, L., Bailey, A. L., & Griffin, N. (2008). Recommendations for Assessing English Language Learners: English Language Proficiency Measures and Accommodation Uses. IES PR/Award Number R305A050004. (Currently available as CSE Tech. Report No. 737). Los Angeles: University of California, National Center for Research on Evaluation, Standards, and Student Testing (CRESST).

RECENT CONFERENCE PRESENTATIONS:

- Bailey, A.L. (July, 2011). Academic Language in Transition: Observations of student-teacher interactions across preschool and kindergarten activity settings. Poster presented at the Conference of the International Association for the Study of Child Language, Montreal, Canada.
- Bailey, A.L. (April, 2011). Modeling Academic Language: Scrutinizing its features and facets

- Symposium paper presented at the American Educational Research Association Annual Conference, New Orleans, LA.
- Bailey, A.L. Hart, E. & Heritage, M. (April, 2011). The Dual Roles of the Linguistic and Mathematical Features of Pre-algebra Explanations. Roundtable paper presented at the American Educational Research Association Annual Conference, New Orleans, LA.
- Bailey, A.L. & Heritage. (April, 2011). Developing a defensible foundation for English language proficiency assessment: Challenges and concerns with academic language constructs. Symposium paper presented at the American Educational Research Association Annual Conference, New Orleans, LA.
- Bailey, A.L. Huang, Y. & Escobar, M. (April, 2011). Formative Assessment of Academic Language and Science Learning with Young English Language Learners. Roundtable paper presented at the American Educational Research Association Annual Conference, New Orleans, LA.
- Huang, Y., & Bailey, A.L. (June, 2010). Closing the Academic Language Gap for English Language Learners Transitioning from Pre-Kindergarten to Kindergarten. National Headstart Research Conference, Washington, DC.
- Bailey, A. L. (June, 2010). Role of the Research Partner in the EVEA Project: The State of Washington. Symposium paper presented at the Council of Chief State School Officers Student Assessment Conference, Detroit, MI.
- Bailey, A.L. Chang, S., Heritage, H. & Huang, Y. (April, 2010). Exploring the Concept of Teacher Linguistic Pedagogy in Mathematics. Roundtable paper presented at the American Educational Research Association Annual Conference, Denver, CO.
- Bailey, A.L. & Huang, B. (April, 2010). Using Verbal Protocol with 4-6 Graders to Identify Challenging Vocabulary in Academic Texts. Symposium paper presented at the American Educational Research Association Annual Conference, Denver, CO.
- Bailey, A.L. & Martinez, F-J., (April, 2010). How do English-only and Bilingual Teachers Facilitate the Science and Language Learning of ELL Students? Paper presented at the American Educational Research Association Annual Conference, Denver, CO.
- Bailey, A.L. & Reynolds Kelly, K. (March, 2010). Proving the appropriate “dose” of verbal

scaffolding: Analyzing and interpreting change in mother-child narrative co-construction with links to literacy. American Association of Applied Linguists, Atlanta, GA.

Bailey, A.L., Huang, Y., Osipova, A., & Beaugrand, S. (March, 2010). A Teacher Researcher Collaboration for the Academic Language and Science Learning of Young English Language Learners: Facilitating the Transition from Pre-Kindergarten to Kindergarten. The California Association of Latino Superintendants and Administrators Conclave, Los Angeles, CA.

RECENT INVITED PRESENTATIONS:

Bailey, A.L. (May 2011). The PreLAS Observational Assessment for Three-Year-Olds. National English Language Learners Advisory Panel, CTB/McGraw-Hill, Monterey, CA.

Bailey, A.L. (Oct. 2010). Collaboration for the Academic Language and Science Learning of Young English Language Learners: Facilitating the Transition from Pre-Kindergarten to Kindergarten. Paper presented at the The California Association of Latino Superintendants & Administrators Conclave/UC Davis School of Education, Davis, CA.

Bailey, A.L. (Sept. 2010), Review of the Use and Validity of Home Language Surveys in State English Language Proficiency Assessment Systems. Presentation to the CELDT Technical Advisory Board, California Department of Education.

Reynolds, Kelly, K., Bailey, A.L. & Forte, E. (Aug. 2010). Home Language Surveys in State English Language Proficiency Assessment Systems. Webinar to Title III State Directors, for the Office for English Language assessment, US Dept. of Education.

Huang, Y. & Bailey, A.L. (Aug., 2010). Enhancing Academic Language and Science Learning in Kindergarten Classrooms. Paper presented at the Accord Institute for Education Research, Garden Grove, CA.

Rivera, C., Anstrom, K, DiCerbo, P. & Bailey, A.L. (Feb, 2010). Linking Academic Language to Academic Standards: The California Example. Webinar presented to the California Department of Education. The Gates Foundation Final Project Report.

Margaret Heritage
National Center for Research on Evaluation, Standards, & Student Testing
Center for the Study of Evaluation
UCLA Graduate School of Education and Information Studies
Los Angeles, CA 90095-7150

(b)(6)

PROFESSIONAL PREPARATION

University of Leeds, England.

BA (Hons) English/French, 1971

University of Warwick, England.

Education Graduate Certificate in Education
(Awarded with distinction) 1975.

APPOINTMENTS

- 2002-present Assistant Director for Professional Development, National Center for Research on Evaluation, Standards and, Student Testing, UCLA.
- 2002 Lecturer, Department of Education, Stanford University, Palo Alto, California.
- 1996-2002 Lecturer (Reading Development), Department of Education, UCLA.
- 1994-2002 Principal, Corinne A. Seeds University Elementary School, The Laboratory School of the Graduate School of Education and Information Studies, UCLA.
- 1991-94 Director of Children's School, Pacific Oaks College, Pasadena, CA.
- 1990-94 Instructor, Education Extension, UCLA.
- 1990-91 Instructor, Department of Educational Administration, California State University, Los Angeles.

RECENT PUBLICATIONS

- Heritage, M. (in preparation). Gathering Evidence of Student Understanding, in J. McMillan. (ED). *Sage Handbook of Research on Classroom Assessment*.
- Bailey, A., Heritage, M., & Butler, F. (in preparation). Assessing young language learners: developmental considerations and curricular contexts. *Companion to Language Assessment*.
- Heritage, M. (in press). *Knowing What to Do Next: The Hard Part of Formative Assessment?* CADMO, The Journal of the Association for Educational Assessment, Europe. FrancoAngeli: Milan, Italy.
- Heritage, M. (2011, Spring). Formative assessment: An enabler of learning. *Better: Evidence-based Education*, 3(3), 18-19.
- Heritage, M. (2010). *Formative Assessment and Next-generation Assessment Systems: Are We Losing an Opportunity?* Paper commissioned by The Council of Chief State School Officers: Washington, DC.
- Heritage, M. (2010). *Formative assessment: Making It Happen In the Classroom*. Corwin Press: Thousand Oaks, CA.
- Heritage, M. (March, 2010). *Assessment for Teaching and Learning*. Center for K-12 Assessment & Performance Management. ETS: Princeton, NJ.
- Heritage, M., Kim, J., Vendlinski, T. Herman, J. (Fall, 2009). From evidence to action: a seamless process in formative assessment? *Education Measurement: Issues and Practice*. 28, (3), pp. 24-31. Blackwell: New York.
- Price, P., Tepperman, J., Iseli, M., Duong, T., Black, M., Wang, S., Boscardin, C., Heritage, M., Pearson, P.D., Narayanan, S., Alwan, A. (2009). Assessment of emerging reading skills in young native speakers and language learners. *Speech Communication*. Elsevier: Amsterdam, The Netherlands.
- Heritage, M. (May, 2009). Charting their course: student self-assessment. *The Middle School Journal*. National Association of Middle Schools: Westerville, OH.
- Heritage, M., & Popham, W., J. (2008). Tight but loose: through the looking glass in E.C.Wylie. (Ed.). (2008). *Tight but loose: scaling up teacher professional development in diverse contexts*. RR-08-29. ETS: Princeton, NJ. pp. 125-133.

- Heritage, M. (February, 2008). *Learning progressions: supporting instruction and formative assessment*. Paper Commissioned by the Council of Chief State School Officers: Washington DC.
- Bailey, A., & Heritage, M. (2008). *Formative assessment for literacy, grades K-6: building reading and academic language skills across the curriculum*. Corwin Press: Thousand Oaks, CA.
- Heritage, M. (October, 2007) Formative assessment: what teachers need to know and do. *Phi Delta Kappan*. 89 (2) Phi Delta Kappan International: Bloomington, IN. pp.140-146.
Reprinted in C. Garrison & D. Chandler (Eds.). *Effective Classroom Assessment: Linking Assessment with Instruction* (forthcoming). National Association of Middle Schools: Westerville, OH.
- Wang, S., Price, P., Heritage, M., Alwan, A. (2007). Automatic evaluation of children's performance on an English syllable blending task," *Proc. SLATE*. Farmington: Pennsylvania, pp. 120-123.
- Heritage, M., Silva, N., & Pierce, M. (2007). Academic language: A view from the classroom, in A. L. Bailey. (Ed.). *Language Demands of Students Learning English in School: Putting academic language to the test*. Yale University Press: New Haven CT. pp. 171-210.
- Tepperman, J., Black, M., Price, P., Lee, S., Kazemzadeh, A., Gerosa, M., Heritage, M., Alwan, A., Narayanan, S. (2007). A Bayesian network classifier for word-level reading assessment. *Proc. InterSpeech -2007*, Antwerp: Belgium, pp. 2185-2188.

TECHNICAL REPORTS

- Heritage, M., & Vendlinski, T. (2006). Measuring Teachers' Mathematical Knowledge. CSE Report 696. Center for Research on Evaluation, Standards and Student Testing. Los Angeles: University of California
- Heritage, M., Lee, J.J., Chen, E., La Torre, D. (2005). Upgrading America's Use of Information to Improve Student Achievement. CSE Report 661. Center for Research on Evaluation, Standards and Student Testing. Los Angeles: University of California

SELECTED RECENT INVITED PRESENTATIONS

- Heritage, M. (2011, January). Invited presentation. *Using Assessment Data Effectively to Improve Curricula, Teaching and Learning*. Central Board of Secondary Education and the Australian Council for Education Research International Education Conference, Delhi, India.
- Heritage, M. (2010, November). Invited presentation. *Evaluating the Validity of Diagnostic Assessments for Formative Purposes*. Diagnostic Assessment Conference, Friday Institute, North Carolina State University, Raleigh, NC.
- Heritage, M. (2010, October). Invited presentation. *Formative Assessment: Conditions for Effective Practice*. Leading Successful School Turnarounds: Learning from Research and Practice Conference, sponsored by the REL West, the California Comprehensive Center and the Southwest Comprehensive Center, Los Angeles, CA.
- Heritage, M. (2010, July). Invited presentation. *How Can Assessment Support Students to be College and Career Ready? Turning Around Low-Achieving Schools: A Blueprint for Reform*. SEDL, Austin, TX.
- Heritage, M. (2010, May). Invited presentation. *Making Use of Assessment Information: Challenges and Prospects*. Learning Points Institute in Collaboration With the Council of Chief State School Officers. Lisle, IL.
- Heritage, M. (2010, April). Invited presentation. *Making Use of Assessment Information*. National Research Council/Board on Testing and Assessment. National Academies, Washington, DC.
- Heritage, M. (2010, May). Invited presentation. *Communicating a Culture of Data Use*. Meeting Sponsored by the American Youth Policy Forum and the Data Quality Campaign, Little Rock, AR.
- Heritage, M. (2009, December). Invited presentation. *Assessment for Teaching and Learning*. Exploratory Seminar: Measurement Challenges Within the Race to the Top Agenda. Center for K-12 Assessment & Performance Management. ETS, Princeton, NJ.

Heritage, M. (2009, August). Invited presentation. *Lessons Learned About Formative Assessment Use: Implications for Classroom Teachers, Professional Development Providers, and District Leaders*. Regional Educational Laboratory, Midwest Conference. Chicago, IL.

Heritage, M. (2009, February). Invited presentation. *Formative Assessment for English Language Learners*. Iowa Culture and Language Conference, Des Moines IA.

Heritage, M. (2009, January). Invited keynote address. *Formative Assessment: Improving Student Learning*. Montana State Assessment Conference, Billings, MT.

OTHER PRESENTATIONS

Heritage, M. (2011, April). Discussant for Symposium: *Measurement and Evaluation of Teacher Effectiveness*. Chair: Vickie Cartwright. The Annual Meeting of the National Council on Measurement in Education, New Orleans, LA.

Bailey A. L., & Heritage, M. (2011, April). *Developing a Defensible Foundation for English Language Proficiency Assessment: Challenges and Concerns with Academic Language Constructs*. Chair: Mikyung Wolf. The Annual Meeting of the American Educational Research Association, New Orleans, LA.

Bailey A. L., & Heritage, M. (2011, April). *The Dual Roles of the Linguistic and Mathematical Features of Pre-algebra Explanations*. The Annual Meeting of the American Educational Research Association, New Orleans, LA.

Heritage, M. (2011, April). Presentation. *Developing learning progressions*. Chair: James Popham. The Annual Meeting of the American Educational Research Association, New Orleans, LA.

Heritage, M., & Heritage, J. (2011, April). Presentation. *Teacher Questioning: the epicenter of instruction and assessment*. Chair: Christina Schneider. The Annual Meeting of the American Educational Research Association, New Orleans, LA.

Heritage, M., Jones, B., & White, E.S., (2010, April). Presentation. *Supporting Teachers' Use of Formative Assessment Evidence to Plan the Next Instructional Steps*. Chair: Margaret Heritage. The Annual Meeting of the American Educational Research Association, Denver, CO.

Bailey, A., Chang, S., Heritage, M., & Huang, Y. (2010, April). Presentation. *Exploring the Concept of Teacher Linguistic Pedagogy in Mathematics*. The Annual Meeting of the American Educational Research Association, Denver, CO.

Heritage, M. (2009, November). Presentation. *Knowing What To Do Next: The Hard Part of Formative Assessment*. Association of Educational Assessment – Europe, Tenth Annual Conference, Valetta, Malta.

Heritage, M. & Popham, J. (2009, November). Presentation. *Learning Progressions: Assembly and Assessment*. Association of Educational Assessment – Europe, Tenth Annual Conference, Valetta, Malta.

Heritage, M. (2009, June). Presentation. *Formative Assessment to Increase the Academic Achievement of English Learners*. Council of Chief State School Officers Assessment Conference. Los Angeles, CA.

Heritage, M. (2009, June). Discussant for Symposium: *Daily Formative Assessment Practice: What Does Teacher Support Look Like?* Chair: Caroline Wylie, ETS. Council of Chief State School Officers Assessment Conference. Los Angeles, CA.

Heritage, M. (2009, June). Presentation. *Developing a Model of State Implementation for Formative Assessment*. Council of Chief State School Officers Assessment Conference. Los Angeles, CA.

Heritage, M. (2009, April). Presentation. *Learning Progression: Supporting Instruction and Formative Assessment*. The Annual Meeting of the American Educational Research Association, San Diego, CA.

Heritage, M. (2009, April). Discussant for Symposium: *Formative Assessments: Coming of Age—Formative System*. Chair: John Poggio, University of Kansas. The Annual Meeting of the American Educational Research Association, San Diego, CA.

Heritage, M. (2008, September). Presentation. *Inquiry Focused Practice: Making Decisions about Learning in the Classroom*. Council of Chief State School Officers Leadership Conference. Milwaukee, WI.

Heritage, M. (2008, June). Presentation. *Learning Progressions: Supporting Instruction and Formative Assessment*. Council of Chief State School Officers Assessment Conference. Orlando, FL.

Heritage, M. (2008, June). Discussant for Presentation: *Wylie, E.C. The Power of One*. Council of Chief State School Officers Assessment Conference. Orlando, FL.

Heritage, M. (2008, June). Discussant for symposium: *Results of the Ten State Collaborative on Formative Assessment*. Chair: Wendy Roberts, Delaware Department of Education. Council of Chief State School Officers Assessment Conference. Orlando FL.

Heritage, M. (2008, June). Discussant for symposium: *The Impact of Intervention Integrity on Formative Assessment*. Chair: James Ysseldyke, Professor, Department of Educational Psychology, University of Minnesota. Council of Chief State School Officers Assessment Conference. Orlando, FL.

Heritage, M. (2008, March). Discussant for symposium: *Swimming in the Dataquarium*. Chair: Arie Van der Ploeg, Senior Researcher, Learning Points Associates. The Annual Meeting of the American Educational Research Association, New York, NY.

Heritage, M. (2008, March). Discussant for symposium: *The State's Role in Formative Assessment*. Chair: Caroline Wylie, Educational Testing Service. The Annual Meeting of the American Educational Research Association, New York, NY.

ASSESSMENT DEVELOPMENT

Bailey, A. L., Cano, L., Fischer, D., Jacobs, J. Heritage, M., Gallimore, R., Moes, D., Chow, V. LaBelle, C., & Lightbody, A. (1999; Revised 2000). *The Literacy Development Checklist and Manual*. Seeds University Elementary School, UCLA.

Heritage, M., & Vendlinski, T. (2006). Measures of teacher knowledge of key ideas underlying mastery of algebra I.

Heritage, M. (2006). Measures of early reading skills for project Automating Assessment of Academic Standards for Very Young Native and Non-Native Speakers of American English: University of California, National Center for Research on Evaluation, Standards, and Student Testing

INSTRUCTIONAL MEDIA

Heritage, M., in collaboration with the North Carolina Department of Public Instruction, (2007) *Improving Student Writing Through Formative Assessment: online professional development: Assessment and Accountability Content Center*. Los Angeles: University of California, National Center for Research on Evaluation, Standards, and Student Testing.

Heritage, M. (2006). *Selecting and Using Diagnostic Assessments: online professional development: Assessment and Accountability Content Center*. Los Angeles: University of California, National Center for Research on Evaluation, Standards, and Student Testing

Heritage, H. M., Casey, L., Choi, S., & La Torre, D. (2004). *Web-based Training for the Quality School Portfolio*: University of California, National Center for Research on Evaluation, Standards, and Student Testing

CURRENT PROFESSIONAL ACTIVITIES

Assessment and Accountability Comprehensive Center – Lead for Data Use Program

Advisor for the Formative Assessment for Students and Teachers (FAST) State Collaborative on Assessment and Student Standards (SCASS).

Member: Florida Mathematics Formative Assessment Advisory Panel.

Member: Advisory Board for IES grant, Multilevel Assessments of Science Standards (MASS). PI: Edys Quellmaltz, WestEd.

Member: Advisory Board for NSF grant, Informing Middle Grade Mathematics Through Formative Assessment Principal Investigator, Fred Gross, Education Development Center.

Member: Advisory Board for IES grant, Creating Cross-grade Assessments of the Development of Core Algebraic Constructs. Principal Investigator, Malcolm Bauer, ETS.
Member: Louisiana Technical Advisory Committee on Teacher Evaluation
Member: Washington Advisory Committee on Formative Assessment
Reviewer for Journal *Educational Assessment*.
Reviewer for Journal *Education Measurement: Issues and Practice*.

RECENT PROFESSIONAL RECOGNITION

Nominee with Alison Bailey for the National Reading Conference, Edward Fry Book Award for Bailey, A., Heritage, M. (2008). *Formative Assessment for Literacy, Grades K-6: Building Reading and Academic Language Skills Across the Curriculum*. Corwin Press: Thousand Oaks, CA.

Co-recipient, with Alison Bailey of the 2007 Anne C. Rosenfield Distinguished Community Partnership Prize, UCLA Center for Community Partnerships.

GRANTS

Institute of Education (June 2010 – June 2014). Developing a Formative Assessment of Academic Reading Comprehension for English Language Learners. (Senior personnel)

National Science Foundation (September 2003 – September 2007): *Automating Assessment of Academic Standards for Very Young Native and Non-Native Speakers of American English* (Senior personnel)

U.S. Department of Education (September 2001 - September 2004): *Upgrading America's Use of Information to Improve Student Performance* (Project Director)

National Science Foundation (October 2000 – September 2002): *Building Bridges to Student and Teacher Learning: Early literacy assessment and intervention planning grant*. (Senior personnel)

UCLA School Management Project: *Teachers as Leaders: Models for Change in Schools* (Co-PI)

UCLA Urban Education Studies Center (June 1997-June 1998): *Early Intervention for Children with Reading Difficulties* (Co-PI)

Governor's Reading Professional Development Institute Support. California Department of Education. (July 1999-June 2000). (Co-PI)

Gluck Foundation (July 1997-June 2000): *Preventing Early Reading Difficulties & UES Literacy Institute* (PI)

Data Recognition Corporation (DRC)
Organizational Capacity Description

Data Recognition Corporation (DRC) is an experienced provider of K-12 assessment services for numerous state education agencies. We currently serve as a primary full-service vendor for more than 20 statewide assessment projects. Our relevant experience includes the development and delivery of computerized statewide assessments since 2006, and the management and administration of ELL assessments since 2005.

In early 2009, DRC began work with the Commonwealth of Pennsylvania to design, develop, and implement a cohesive assessment system targeted toward the goal of college and career readiness for all students. Pennsylvania has the vision of a Standards Aligned System (SAS) which will provide clear standards, fair assessments, curriculum frameworks, instructional support, materials and resources, and interventions—all to impact student achievement in a positive way. As part of this endeavor, DRC is developing and administering the Classroom Diagnostic Tools (CDT) and the Keystone Exams via the **DRC INSIGHT™ Online Learning System**.

The Classroom Diagnostic Tools are a set of online, computer-adaptive assessments in the areas of reading, writing, mathematics, science, and social studies for students in grade six through high school. The tests consist of multiple-choice items (with real-time scoring) and are designed to measure specific student strengths, weaknesses, skills, and knowledge throughout the school year. Teachers receive immediate and actionable data to be used for targeting instruction to meet the needs of individual students. The CDT online reports provide direct links to resources in SAS, including specific lesson plans, interventions, and other resources. The reports will also show the progress of students across test administrations. The diagnostic tests are available for multiple administrations throughout the year.

The Keystone Exams are a series of end-of-course summative assessments required for graduation. Tests consist of multiple-choice and extended-response items and are administered three times per year for 10 high school level courses.

In the past year, DRC has successfully conducted multiple online testing administrations in Pennsylvania, including both fixed-form and computer-adaptive tests. In Spring 2010, the DRC INSIGHT system administered diagnostic field tests in mathematics (fixed-form format) to more than 64,000 students across 136 districts, and over 120 forms were tested. Following the spring field test, reading and science field tests were administered during a five-week window in the fall to nearly 85,000 students in more than 1,200 districts and 3,600 schools. Operational diagnostic exams for mathematics began in Fall 2010 and include the computer-adaptive testing (CAT) component, which adjusts the assessment items that appear on an assessment based on student responses. More than 33,000 field tests of the Keystone Exams were also administered in Fall 2010.

In addition to DRC's online testing work in Pennsylvania, we have extensive experience (since 2006) overseeing the development and administration of computerized testing options for

statewide assessments in Alaska, Idaho, Nebraska, Oklahoma, South Carolina, and Washington, through our partnership with an online testing subcontractor. As prime contractor, DRC has provided oversight of the online delivery of standards-based tests in grades 3-8 and high school; end-of-course tests; and formative assessments. We have effectively managed dual-mode programs, as well as provided smooth transition for tests moving to primarily online administration. **In 2010, DRC oversaw the administration of 1.3 million online tests for our state assessment clients.**

Overall, DRC has successfully managed large-scale testing, performance, and survey projects for over 30 years. We currently manage assessment projects in 10 states. The table below summarizes DRC’s assessment experience by activity for our current assessment contracts.

DRC’s Recent Assessment Experience by Activity

	Alabama High School Graduation Exam	Alabama Reading and Mathematics Test	Alabama AYP	Alaska Standards Based Assess., H.S. Grad Exam. & Science	Alaska Computerized Formative Assessments	Idaho Standards Achievement Tests	Louisiana LEAP, GEE, ELDA, iLEAP, and Alternate Assessments	Nebraska State Accountability (NeSA) and NeSA - Writing	Ohio Graduation Tests	Pennsylvania Keystone Project	Pennsylvania System of School Assessment	South Carolina PASS and HSAP	South Carolina EOCEP	South Carolina ELDA	Washington Comprehensive Assessment Program	West Virginia Science Alignment Study
Project Management	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Item/Test Development	✓	✓		✓		✓	✓	✓		✓	✓					
Curriculum Development										✓						
Alignment Studies	✓	✓		✓		✓	✓									✓
Psychometric Analysis	✓	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
Standard Setting	✓	✓		✓		✓	✓	✓		✓	✓	✓				
Pilot and Field Testing	✓	✓		✓		✓	✓	✓	✓	✓	✓	✓	✓		✓	
Materials Production, Distribution, & Collection	✓	✓		✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Online or Computerized Testing					✓	✓	✓			✓			✓		✓	
Data Collection and Analysis																
Data Cleanup																
Performance Assessment		✓		✓			✓	✓	✓	✓	✓	✓		✓	✓	
Reporting		✓								✓						
Professional Development		✓		✓			✓	✓	✓	✓	✓					
Multiple Administrations per Year	✓			✓	✓	✓	✓		✓	✓	✓	✓	✓		✓	

= Paper-based = Web-based or computer-based

ARA LOTZER
Senior Project Manager

PROFESSIONAL HIGHLIGHTS

As a Senior Project Manager at DRC, Ms. Ara Lotzer coordinates all project activities for her clients, ensuring all tasks are completed on schedule and within budget. She also maintains open lines of communication between DRC and our state clients and works quickly to resolve any issues that may arise. Ms. Lotzer has nine years of project management experience and more than five years of experience with online assessments. She currently serves as the Senior Project Manager for the Idaho Standards Achievement Tests and the Washington Measurements of Student Progress. Her primary contributions to the Idaho and Washington testing programs include developing and maintaining detailed project schedules; overseeing online test development; monitoring materials development and printing; coordinating the on-time delivery of online testing software, materials, data, and reports; and facilitating the communication between internal resource groups and clients to meet critical deadlines.

Ms. Lotzer also has extensive experience managing activities for Alaska on the Standards Based Assessments and High School Graduation Qualifying Examination, and for South Carolina on the Palmetto Achievement Challenge Tests and the Basic Skills Assessment Program. Over the course of her career, she has gained more than 14 years of customer service experience.

Ms. Lotzer holds a B.A. in Management from the University of Northern Iowa in Cedar Falls. She also has a Certificate in Project Management from the University of St. Thomas in St. Paul, Minnesota, and is certified as a Project Management Professional (PMP[®]) through the Project Management Institute.

CURRENT POSITION

2005–Present **Senior Project Manager**
Data Recognition Corporation
Maple Grove, MN

Interacts with clients to document product and service needs. Monitors contract specifications and documents scope changes. Verifies accuracy and quality of products and services provided to clients. Resolves issues and provides timely and accurate progress reports to clients. Promotes communication and cooperation among resource groups and with the client to ensure timely completion of deliverables. Develops, updates, and edits manuals, materials, and project documentation. Collaborates with clients on the development and delivery of technical and assessment coordinator training sessions. Provides coaching and work direction to associate project managers or temporary staff and supports the program director with all project staff supervision.

PROJECT-SPECIFIC EXPERIENCE

Alaska Comprehensive System of Student Assessment
Alternate Assessment—2005–2006
High School Graduation Qualifying Examination—2004–2006
Standards Based Assessment—2004–2006
Idaho Standards Achievement Tests—2006–Present
South Carolina Basic Skills Assessment Program—2002–2004
South Carolina Palmetto Achievement Challenge Tests—2002–2004
Washington Comprehensive Assessment Program:
Measurements of Student Progress—2009–Present

PROFESSIONAL EXPERIENCE

2004–2005 **Project Manager**
Data Recognition Corporation
Maple Grove, MN

Interacted with clients to determine product and service requirements. Provided timely and accurate progress reports and ensured successful project completion. Organized and scheduled work to be completed and resolves issues. Developed, updated, and maintained project materials, such as manuals, publications, meeting agendas, and project documentation. Monitored project status, distribution and collection systems, and printing production. Provided customer service to school districts needing assessment-related assistance. Provided work direction to associate project managers or temporary staff as needed and monitored quality of work.

2002–2004 **Associate Project Manager**
Data Recognition Corporation
Maple Grove, MN

Worked with clients to resolve problems and expedite communication. Interacted with team members to obtain and disseminate information regarding projects, prioritize work, and coordinate tasks to meet deadlines. Developed, edited, and proofread manuals, publications, and project documentation. Managed projects within budget by obtaining bids from outside vendors to find the best price, determining costs, and purchasing materials. Verified answer keys and test questions. Monitored project status, distribution and collection systems, and printing production. Provided customer service to school districts needing assessment-related assistance.

**2000–2002 Service Consultant
American Express Financial Advisors
Minneapolis, MN**

Accepted and established mutual fund, certificate, annuity, limited partnership, brokerage, and wrap accounts within qualified plans. Responded to service requests from advisors and clients via telephone and written correspondence. Researched, analyzed, and provided resolution of complex new account issues. Trained and coached new team members; maintained and analyzed team quality and productivity reports; and assisted in monitoring team performance. Updated and documented business procedures. Identified and implemented process improvements. Participated in analysis, design, test, and implementation of new systems. Served as a content expert for team members and other process groups.

**1997–2000 Service/Advanced/Senior Associate
American Express Financial Advisors
Minneapolis, MN**

Responded to service requests from advisors and clients via telephone and written correspondence. Accepted and established mutual fund, certificate, annuity, and limited partnership accounts within qualified plans. Allocated and reconciled qualified plan contributions.

CERTIFICATIONS

Certified Project Management Professional (PMP®)
Project Management Institute (PMI)

EDUCATION

University of St. Thomas
Minneapolis, MN
Certificate, Project Management

University of Northern Iowa
Cedar Falls, IA
B.A., Management

MetriTech, Inc.
Organizational Capacity Description

For more than 25 years, MetriTech, Inc. has offered clients a strong, documented record of reliability and validity. In its execution of many assessment, analysis, and professional development projects, MetriTech has been dedicated to acquiring the resources, equipment, and experience to work collaboratively with clients, with the goal of meeting their needs and finding solutions to their challenges.

MetriTech achieves its client's complex objectives by assigning long-term work teams to projects, beginning with participation in creating the proposal and continuing through program start-up, implementation, and completion. The result of this commitment through a project's life is a carefully selected team, one supporting the creation and delivery of a world-class assessment program. This same team also focuses on opportunities to improve cost effectiveness and efficiency through the entire process, potentially translating to client-level savings.

MetriTech has diversified experience in all phases of the development and delivery of assessment products and services. MetriTech provides item and form development, project management, scoring/reporting, professional development, and evaluation services both inside and outside of the education arena. These skills and the accompanying successes provide a broad perspective within a variety of assessment environments. MetriTech products and services are used directly for, or in support of, assessment, program evaluation, and human resource planning.

To demonstrate the firm's qualifications, a few of the testing programs successfully completed by MetriTech include:

- World-Class Instructional Design and Assessment (WIDA)
- California English Language Development Test (CELDT)
- Illinois Measure of Annual Growth in English (IMAGE)
- Illinois Standards Achievement Test (ISAT)

MetriTech's strength has always originated from the firm's superb staff. The organization has consistently demonstrated the expertise, knowledge, and skills essential to administer the ACCESS for ELLs® program. With an experienced staff of over 700 full- and part-time individuals, MetriTech brings together the knowledge, skills, and abilities essential to the success of the program. The staff ensures reliable and valid information, serving as a basis for accurate and reflective educational decisions.

MetriTech's long history of providing test development, scoring, and associated support services to clients makes the firm a knowledgeable and value-added partner.

SUSAN C. FELDMAN

EDUCATION

1986

BELOIT COLLEGE, *Beloit, WI*
B.A.

PROFILE

Vice President of Operations with over 20 years of corporate and governmental experience organizing procedures and personnel to achieve time-sensitive objectives. Top data and information management skills as demonstrated through oversight of the annual scoring process involving over 4 million test documents and 16 million constructed response items. Able to methodically determine and monitor workflow, ensuring the accurate and timely processing of client materials. Strong quantitative and analytical abilities with proven experience identifying issues, communicating strategies, and executing innovative solutions.

EXPERIENCE

MetriTech, Inc., *Champaign, IL*
Vice President of Operations

2001 – Present

Oversees all operations including the running of the Scoring Centers from receipt of test materials to final production and distribution of reports. Over 4 million test documents are scored annually, including the scoring of over 16 million constructed response items.

- Oversees all hiring, training, scheduling, and management responsibilities for over 1000 employees at two Central Illinois scoring locations.
- Plans and implements workflow for projects ranging in size from 5,000 test booklets with 4-week turnaround to 1.2 million test booklets arriving in a 14-week window with an 8-week turnaround.
- Works closely with clients to ensure delivery of a quality and timely end-product.
- Assists and guides information technology and programming staff in the identification of database and information needs. Ensures that needs are promptly addressed.

United States Department of Commerce, *Accuracy and Coverage Evaluation, Chicago, IL*
Team Supervisor, State of Illinois

1999 – 2001

Hired, trained, and managed 240 field staff and 5 office personnel involved in the enumeration of up to 25,000 selected housing units for the Illinois Census.

- Planned and executed the hiring and training of a three-tiered, 240-person field force responsible for enumerating selected households in the state of Illinois. Included the coordination of efforts among 25 independent offices throughout the state to handle the field staff's administrative requirements. Coordination effort accomplished on five occasions for each of the different, unique operations.
- Determined and implemented workflow for each of the different time-sensitive operational phases, including field assignments, data acquisition, data processing, quality control, data integrity, report processing, and shipping.
- Mastered and taught an ever-changing proprietary operation system to the staff for each of the operations. The system was used for tracking of assignments in the field and monitoring of quality and costs for each operation.
- Adapted to challenging field situations including unpredictable working conditions. Moreover, each operation had a varied timetable from four to ten weeks requiring strict adherence to the timeline, regardless of criteria changes or delays throughout the process.

SUSAN C. FELDMAN

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EXPERIENCE (continued)

Promotion Information Management, Inc., Chicago, IL

1986 – 1997

Director of Production (1996–1997)

Oversaw data acquisition, research and production output, staff management, and a 125-person nationwide scouting system. Also held budgetary responsibility for \$1.1 million.

- Key member of team that designed and implemented a new relational information management database system including 50 related databases and lookup tables, each comprising 5 years of data with 1,500 to 100,000 records.
- Analyzed workflow and implemented changes to increase workflow by 100% without increasing overtime or staff.
- Developed and implemented the plans for system cut-over with no client impact.
- Defined and enacted business rules for data tracking and maintenance.
- Devised and implemented successful employee training programs for the new information management relational database system.
- Created a 125-person nationwide scouting system for data acquisition.
- Worked with clients, IS, and sales staff to define new and changing report specifications.

Database System Development Manager (1993–1995)

Key member of the team responsible for creating a new method to track, maintain, and report manufacturer's consumer packaged goods promotional activity.

- Designed, tested, and integrated new database design. Partnered with Vice President of Information Systems to design and develop new business system requirements.
- Interacted with IS department regarding programming of new system and user interfaces.
- Served as the liaison between sales, customer service, and production staff to implement new and custom client services.
- Relocated and merged an acquired company's operation, requiring the hiring of all personnel, training, AS400 system setup and maintenance, data acquisition, data processing, production, quality control, report processing, and shipping.
- Formulated and put into practice a complete operations department and production plan for acquired company.

Assistant Operations Manager (1988–1992)

Managed 18-member research and production output staff.

- Held responsibility for data acquisition, data processing, report production, and back data storage.
- Managed daily production and employee activities.
- Coordinated the production assimilation of new and special information requests from clients, sales force, and customer service.
- Created new report formats to fulfill changing client needs.
- Monitored quality control issues for all data and database maintenance.
- Trained and informed clients, vendors, and consultants on reports and services.
- Selected and maintained relationships with vendors and consultants.

Editorial Staff Member (1986–1987)

Managed all aspects of competitive report preparation for manufacturer's promotions for consumers packaged goods.

- Printed, shipped, and entered data for reports.
- Edited and proofread competitive reporting.
- Interacted frequently with clientele, defining and producing client-specific special reports.

VITA

Edward D. Roeber

NAME: Edward D. Roeber

ADDRESS:

(b)(6)

OFFICE:

EDUCATION

Public School: Ann Arbor Public Schools

Undergraduate: 1962-63 Ohio Wesleyan University, Delaware, Ohio

1963-66 University of Michigan
College of Literature, Science, and the Arts

A.B. 1966 Major: Psychology Minor: Political Science

Graduate: 1966-70 University of Michigan School of Education

A.M. 1967 Major: Measurement and Evaluation
Minor: Education Psychology

Ph.D. 1970 Major: Measurement and Evaluation
Minor: Educational Psychology

WORK EXPERIENCE

Professor, Measurement and Quantitative Methods, Michigan State University College of Education, East Lansing, MI. September, 2007 to Present (Dr. Robert Floden)

Responsibilities: Teach graduate-level measurement classes. Serve as faculty and student advisor on assessment issues. Assist Teacher Education Program in developing pre-service teacher coursework on classroom-based student assessment and the MQM program to develop a master's degree in educational assessment for practitioners. Develop assessment components of grant proposals submitted to state and federal agencies by MSU College of Education faculty.

Senior Executive Director, Office of Assessment and Accountability, Michigan Department of Education, Lansing, MI. November, 2003 to September, 2007 (Dr. Jeremy Hughes; Dr Sally Vaughn)

Responsibilities: Direct the Office of Educational Assessment for the Department. This includes overseeing the Michigan Educational Assessment Program, MI-Access (the state's alternate assessment program), and the state's assessments for English language learners. Short-term work includes restoring public confidence in the program by helping to produce accurate results on-time. Longer term efforts will include transitioning the state's assessments to fully comply with Federal testing requirements, including NCLB and IDEA-97, as well as state laws and regulations.

Instructor, Michigan State University, East Lansing, MI. (2006).

Responsibilities: Co-Taught CEP 920, Item Development with Dr. Sharif Shakrani

ANNUAL PRESENTATIONS

2006, 2007	MEAP Assessment Coordinator Briefings
2004-2006	MEAP Conferences on Using and Reporting Results
1974-Present	Michigan School Testing Conference
1975-Present	CCSSO National Conference on Large-Scale Assessment
1989-Present	National Council on Measurement in Education

OTHER PRESENTATIONS

2006	Michigan Educational Research Association
2006	Michigan Fall Assessment Conferences (6). Opening Session Presenter
2006	Michigan Reading Association
2007	Michigan Association of Secondary School Principals
2007	MASCD Bootcamp Session on Formative Assessment – co-presenter
2007	Michigan Reading Association
2008	Macomb ISD/MASCD session on formative assessment – opening presenter
	MASCD Bootcamp Session on Formative Assessment – co-presenter
2009	MASCD Bootcamp Session on Formative Assessment – co-presenter
	Webinar on assessment in the arts for NASDAE

CONSULTATION

2004	Nevada Special Education Technical Advisory Committee (2004-2005)
2005	Ontario Provincial Department of Education Advisor on RFP development (2005).

- 2006 National Assessment Governing Board, Wrote Paper on the Motivation of Twelfth Grade Students for the NAEP
- Tennessee Technical Advisory Committee (2006)
- Idaho Technical Advisory Committee (2006 to Present)
- Utica, MI Community Schools Review of the Performance of the Utica Community Schools (2006-2007)
- 2007 Panel Member, Washington Office of Superintendent of Public Instruction, Assessing English Language Learners, 2007
- Member, RFP Review and Selection Committee, National Board of Professional Teaching Standards
- Member, Technical Advisory Committee, National Board of Professional Teaching Standards (2007)
- 2008 Technical Advisor on technical skill assessment to the Office of Career and Technical Education, Michigan Department of Education
- Review Facilitator, National Clearinghouse for English Language Acquisition (2008)
- Member, Technical Work Group, National Clearinghouse for English Language Acquisition (2008-2010)
- 2009 Contractor to the Idaho State Department of Education for the ISAT-Alt alternate assessment program (2009-present)
- 2010 Assist the MS Department of Education to revise its RFP for the alternate assessment program, and assist in the conduct of competitive bidding on the project.
- Write paper for using large-scale assessments to evaluate classroom teachers (Michigan Education Association).

PUBLICATIONS

Rabinowitz, S., Roeber, E, Schroeder, C, and J. Sheinker. "Creating Aligned Standards and Assessment Systems." Washington, DC: Council of Chief State School Officers, 2006.

Roeber, Edward D. "The History of the National Conference on Large-Scale Assessment Conference." Washington, DC: Council of Chief State School Officers, 2006.

Roeber, Edward D. "Review of the Performance of the Utica (Michigan) Public Schools." Utica, MI, 2007

Roeber, Edward D, et al. "History of the State Collaborative on Assessment and Student Standards." Washington, DC: Council of Chief State School Officers, 2007.

Roeber, Edward D. "Off-the-Shelf Tests and NCLB – Peer Review Issues." Paper prepared for the 2008 National Council on Measurement in Education conference, New York, NY.

Topol, Barry, J. Olsen, and E. Roeber. "The Cost of New High Quality Assessments: A Comprehensive Analysis of the Potential Costs for Future State Assessments." Stanford Center for Opportunity Policy in Education. 2010.

Olson, John, E. Roeber and B. Topol. "Guidelines for Organizing and Leading a State Assessment Consortium." Boston, MA: Assessment Solutions Group. 2010.

Martineau, J., E. Roeber and R. Abell. "Idaho Standards Achievement Tests-Alternate Standard Setting Report." Lansing, MI: Author. 2010.

Roeber, E. and R. Abell. "Idaho Standards Achievement Tests-Alternate Project Report." East Lansing, MI: Author. 2010.

Roeber, E. "Using Tests to Evaluate Teachers." East Lansing, MI: Michigan Education Association. 2010.

RESEARCH PROJECTS

Michigan Department of Education (Measurement, Incorporated) Research on the Implementation of Formative Assessment Professional Development in Michigan. 2009-2011

Kalamazoo RESA. Research on the Implementation of Online Assessments in Multiple Online Assessment Systems. 2010-2011.

PROFESSIONAL AFFILIATIONS

American Educational Research Association

National Council on Measurement in Education
Member, Board of Directors 1992-95
Co-Chair, 1994 Annual Meeting
Chair, Membership Committee 2003-2004

Phi Delta Kappa

Mary J. Schleppegrell
May, 2011

(b)(6)

Education

Ph.D., Linguistics, 1989
Georgetown University, Washington, DC

M.A., Teaching English as a Foreign Language, 1982
American University in Cairo, Cairo, Egypt

Multiple Subjects Teaching Credential, 1978
California State University, Sacramento, CA

B.A., *summa cum laude*, German, 1972
University of Minnesota, Minneapolis, MN

Experience

- Professor of Education, University of Michigan, Ann Arbor. 2005-present.
- Professor of Linguistics, University of California, Davis, CA., 2004-2005.
- Chair, Linguistics Graduate Group, University of California, Davis, CA. 2002-2005.
- Member, Education Graduate Group, University of California, Davis, CA. 1997-2005.
- Associate Professor of Linguistics, University of California, Davis, CA. 1998-2004.
- Director of English as a Second Language, University of California, Davis, CA. 1992-2003.
- Assistant Professor of Linguistics, University of California, Davis, CA. 1992-1998.
- Education Specialist, Peace Corps, Washington, DC, 1989-1992.
- Language and Training Specialist, Center for Applied Linguistics, Washington, DC, 1985-1989.
- Consultant for Language Training Program Development, Cairo, Egypt and Washington, DC, 1981-85.
- Instructor, Freshman Writing Program, American University in Cairo, Cairo, Egypt, 1980-82.
- Master Teacher, California State University, Sacramento, teacher education program, 1979-80.
- Teacher, Grades K-6, Elk Grove Independent School District, Elk Grove, CA, 1977-80.

Recent Publications

Books, articles, and book chapters

- Chang, Peichin, and M.J. Schleppegrell. (in press). Taking an effective authorial stance in academic writing: Making the linguistic resources explicit for L2 writers in the social sciences. *Journal of English for Academic Purposes*.
- Schleppegrell, M. J. and Catherine L. O'Hallaron. (forthcoming). Teaching academic language in L2 secondary settings. *Annual Review of Applied Linguistics*, 31.
- Schleppegrell, M. J. (forthcoming). Systemic Functional Linguistics: Exploring meaning in language. In James Paul Gee and Mike Handford (Eds.), *The Routledge Handbook of Discourse Analysis*. New York: Routledge.
- Schleppegrell, M. J. (2011). Supporting disciplinary learning through language analysis: Developing historical literacy. In F. Christie and K. Maton (Eds.), *Disciplinary: Functional Linguistic and Sociological Perspectives* (pp. 197-216). London: Continuum.
- Schleppegrell, M. J. (2010). Supporting a “reading to write” pedagogy with functional grammar. *NALDIC Quarterly*, 8(1), 26-31.
- Schleppegrell, M. J. (2010). Language in mathematics teaching and learning: a research review. *Language and mathematics education: Multiple perspectives and directions for research* (pp. 73-112). Charlotte, NC: Information Age Publishing.
- Schleppegrell, M. J. (2010). Functional grammar in the classroom. In Olofsson, Mikael (Ed.) *Symposium 2009. Genrer och funktionellt språk i teori och praktik*, pp. 79-95. Stockholm: Stockholms universitets förlag.
- Fang, Z., & Schleppegrell, M. J. (2010). Disciplinary literacies across content areas: Supporting secondary reading through functional language analysis. *Journal of Adolescent & Adult Literacy*, 53(7), 587-597.
- Schleppegrell, M. J. (2009). Grammar for generation 1.5: A focus on meaning. In M. Roberge, M. Siegal & L. Harklau (Eds.), *Generation 1.5 in College Composition: Teaching academic writing to U.S.-educated learners of ESL* (pp. 221-234). New York: Routledge.
- Herbel-Eisenmann, Beth, & Schleppegrell, Mary J. (2008). ‘What question would I be asking myself in my head?’ Helping all students reason mathematically. In M. Ellis (Ed.) *Mathematics for every student: Responding to diversity, Grades 6-8*. Reston, VA: National Council of Teachers of Mathematics (NCTM).
- Fang, Zhihui, and Schleppegrell, Mary J. (2008). *Reading in Secondary Content Areas: A Language-Based Pedagogy*. University of Michigan Press.

Grants

Institute of Education Sciences (IES): “The iterative development of modules to support teachers’ engagement in *Exploring Language and Meaning in Text* with English Language Learners. With Annemarie Palincsar, Co P.I.; July 1, 2010-June 30, 2013; \$1,397,598.

Dearborn Schools: “Functional grammar for reading comprehension and writing development.” December, 2009-May, 2010; \$10,000.

Voluntary Sustainability Award from the Michigan Department of Education for work with Dearborn Public Schools and Cesar Chavez Academy, February, 2009; \$12,982.80.

Reading First English Language Learner Task Force of the Michigan Department of Education: “Supporting English learners’ reading comprehension,” \$5000 (November, 2006); \$10,000 (September, 2007).

University of California Linguistic Minority Research Institute (LMRI): “Helping content area teachers work with academic language: Promoting English Language Learners’ literacy in history,” \$24,909; March, 2003.

California History Project, “English Learners in history classrooms: Challenges and opportunities,” \$52,429; in collaboration with Vaidehi Ramanathan; July, 2001.

University of California Linguistic Minority Research Institute (LMRI), “Grammatical and discourse features of the target genres in California’s English Language Development (ELD) Standards,” \$14,994; March, 2001.

Center for Cooperative Research and Extension Services for Schools, “Initial Reading Instruction: The value of primary language support,” \$2,950; in collaboration with Shelly Wickwire; June, 2000.

Faculty Research Grant, “The linguistic challenges of true-false and multiple choice exams,” Committee on Research, UC Davis, \$1500; 2000-01.

Recent Presentations

Invited Presentations

Schleppegrell, Mary J. 2011. Workshop on academic language. Presented to *The George Washington University Center for Equity and Excellence in Education (GW-CEEE)*, Arlington, VA, March 4, 2011.

Schleppegrell, Mary J. 2010. Evolving language-based pedagogy: Teachers taking up functional grammar. Invited plenary presentation to the *International Systemic Functional Linguistics Association Congress*, Vancouver, BC, July 21, 2010.

Schleppegrell, Mary J. 2010. The role of a meta-language in supporting academic language development. Invited presentation to *the Language, Equity, and Education Policy (LEEP)* graduate student organization, Stanford University, April 13, 2010.

Schleppegrell, Mary J. 2010. Supporting ELL reading with talk and writing. Invited presentation at the *Michigan Reading Association Conference*, March 20, 2010, Detroit, MI.

Schleppegrell, Mary J. 2009. Functional grammar in the classroom. Invited plenary talk for *Symposium 2009: Genrer och funktionellt språk i teori och praktik*. Stockholm University, Stockholm, Sweden, October, 2009.

Research Presentations

Schleppegrell, Mary J. 2011. The relevance of a meaning-based metalanguage in teaching English language learners. Presented at the annual conference of the *American Association for Applied Linguistics (AAAL)*, Chicago, IL, March 29, 2011.

Schleppegrell, Mary J. 2011. Using knowledge about grammar and genre to support writing in the elementary grades. Colloquium presented at the *Writing Research Across Borders II* conference, George Mason University, Reston, VA, February 20, 2011.

Schleppegrell, Mary J. 2010. Supporting meaningful talk about text in the classroom through a focus on the forms language takes. Presented at the annual conference of the *American Association for Applied Linguistics (AAAL)*, Atlanta, GA, March 8, 2010.

Schleppegrell, Mary J. 2010. *Linguistics for linking language and content learning*. Presented at a symposium on *Contributions from Linguistics to Educational Challenges* at the annual meeting of the Linguistic Society of America, Baltimore, MD, January 8, 2010.

Schleppegrell, Mary J. 2009. *Language in academic subject areas and classroom instruction: what is academic language and how can we teach it?* Invited paper for a workshop on *The role of language in school learning* sponsored by The National Academy of Sciences, Menlo Park, CA, October, 2009.

Invited Professional Development Presentations

Schleppegrell, Mary J. and Luciana de Oliveira. 2011. Functional Grammar Strategies to Support English Language Learners. Presentation to CREATE project participants, St. Michael's College, Burlington, Vermont, January 29, 2010.

Schleppegrell, Mary J. and Groover, Ross. 2010. Talking about text with English language learners. Workshop presented at the *Michigan Reading Association Conference*, March 20, 2010, Detroit, MI.

- Schlepppegrell, Mary J. 2010. Embedding instruction in academic language. Presentation to CREATE project participants, St. Michael's College, Burlington, Vermont, January 29, 2010.
- Schlepppegrell, Mary J. 2008. Developing academic language and supporting reading comprehension with functional grammar. August 12-13, 2008. Workshop presented at the *Reading First Institute*, East Lansing, MI.
- Schlepppegrell, Mary J. 2008. Using functional grammar to engage English language learners in talk about text. Workshop presented at the *Michigan Department of Education English Language Learners Directors' Conference*, May 9, 2008, East Lansing, MI.
- Schlepppegrell, Mary J. 2008. Talking about text: Supporting development of ELLs' academic language and content knowledge across subjects. Workshop presented to the Teacher Education faculty of the University of Texas, El Paso, March 7th, 2008.
- Schlepppegrell, Mary J. 2008. Supporting academic literacy development across the curriculum. Workshop presented to the Educational Linguistics Study Group, Oakland Schools, March 4, 2008.

Research and consultant reports

- Schlepppegrell, Mary J. 2009. *Language in academic subject areas and classroom instruction: what is academic language and how can we teach it?* Invited paper for a workshop on *The role of language in school learning* sponsored by The National Research Council of the National Academy of Sciences, Menlo Park, CA, October, 2009. For workshop summary, see http://www.nap.edu/catalog.php?record_id=12907
- Schlepppegrell, M.J. 2007. Language in mathematics teaching and learning: A research review. Prepared for the Spencer Foundation, August, 2007.
- Schlepppegrell, M. J. 2005. *Helping content area teachers work with academic language: Promoting English Language Learners' literacy in history* (Final report: Individual Research Grant Award #03-03CY-061G-D). Santa Barbara, CA: UC Linguistic Minority Research Institute.

Memberships in professional societies:

- American Association for Applied Linguistics (AAAL)
- American Educational Research Association (AERA)
- North American Systemic Functional Linguistics Association (NASFLA) (President, 2010-present)
- Teachers of English to Speakers of Other Languages (TESOL)

CAROL A. CHAPELLE

Distinguished Professor, Liberal Arts and Sciences TESL/Applied Linguistics

Department of English and Program in Linguistics
203 Ross Hall
Iowa State University
Ames, IA 50011 USA

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web page: <http://www.public.iastate.edu/~carolc/>

EDUCATION

Ph.D. in Second Language Acquisition & Teacher Education, University of Illinois at Urbana-Champaign, 1983.

M.A. in Teaching English as a Second Language, University of Illinois at Urbana-Champaign, 1979.

B.A. in Linguistics, Michigan State University, 1977.

FACULTY POSITIONS

Distinguished Professor

Liberal Arts and Science, Iowa State University (2010-present)

Professor

Département de langues, linguistique et traduction, Université Laval (professeure associée, mai 2010-mai 2013).

Department of English and Program in Linguistics, Iowa State University (1996-present)

Département de langues et linguistique et traduction, Université Laval (visiting, summer 1998).

School of Language and Communication, University of Southern Denmark (visiting, summer 2001)

Laboratoire des Sciences de l'Éducation, Université Pierre Mendès France de Grenoble (visiting, March 2002)

Department of Linguistics, Michigan State University (visiting, summer 2003)

Associate Professor

Department of English and Program in Linguistics, Iowa State University (1991-1996)

Department of ESL, University of Hawaii at Manoa (visiting, AY 1991 – 1992 and spring 1996)

Assistant Professor

Department of English, Iowa State University (1985 - 1990)

Department of English, Northern Arizona University (AY 1984 - 1985)

Adjunct Faculty

Department of Secondary Education, University of Illinois at Urbana-Champaign (1984)

TEACHING

Teaching Award

Master Teacher, Awarded for excellence in graduate teaching by the College of LAS, Iowa State University, September 2005

Graduate Teaching

University of Hawaii at Manoa

Second Language Testing

Computer-Assisted Language Learning

Fall 1991; Spring 1992 & 1996

Spring 1992, Spring 1996

Iowa State University

Seminar in Applied Linguistics (ENGL/LING 630)	Fall 2007
Research Methods in Applied Linguistics (ENGL/LING 623)	Fall 2005 & 2008
Second Language Testing (ENGL/LING 519)	Spring 1991, 1999, 2004, 2007, 2010; Fall 1993, 1996
Second Language Acquisition (ENGL/LING 517)	Spring 1986, 1990, 1994, 1995, 1997 & 1998; Fall 1999, 2000, 2002, 2003, 2004, 2005, 2007 & 2009
Computer-Assisted Language Learning (ENGL/LING 526)	Fall 1986, 1997, Spring, 2001, 2003, 2005 & 2008
Introduction to Linguistics (ENGL/LING 511)	Fall 1991, 1994 & 1998; Summer 1999

Northern Arizona University

Computer-Assisted Language Learning	Spring 1985; Summer, 1988
Grammatical Foundations	Summer 1988
TESL Practicum	Spring 1985
Psycholinguistics	Fall 1984

RESEARCH

Research Award

Outstanding Career Achievement in Research Award, College of LAS, Iowa State University, September 2009.

Books (7)

- Chapelle, C.A., & McCormick, J.M., (forthcoming, 2013). A cross-disciplinary study of Québécois cultural content in French language teaching and learning. *Modern Language Journal*, Focus Issue
- Chapelle, C. A., & Jamieson, J. (2008). *Tips for teaching with CALL: Practical approaches to computer assisted language learning*. White Plains, NY: Pearson Education.
- Chapelle, C. A., & Douglas, D. (2006). *Assessing language through computer technology*. Cambridge: Cambridge University Press.
- Stoynoff, S., & Chapelle, C. A. (2005). *ESOL tests and testing: A resource for teachers and program administrators*. Alexandria, VA: TESOL Publications.
- Chapelle, C.A. (2003). *English language learning and technology: Lectures on applied linguistics in the age of information and communication technology*. Amsterdam: John Benjamins Publishing.
- Chapelle, C. A. (2001). *Computer applications in second language acquisition: Foundations for teaching, testing, and research*. Cambridge: Cambridge University Press. (Translated into Arabic, 2007)
- Chapelle, C., Grabe, W., & Berns, M. (1997). *Communicative language proficiency: Definition and implications for TOEFL-2000*. TOEFL-2000 Monograph Series. Princeton, NJ: Educational Testing Service.

Edited Books (4)

- Chapelle, C. A., Enright, M. & Jamieson, J. (Eds.) (2008). *Building a validity argument for the Test of English as a Foreign Language*. London: Routledge.
- Chalhoub-Deville, M., Chapelle, C. A., & Duff, P. (Eds.) (2006). *Inference and generalizability in applied linguistics: Multiple perspectives*. Amsterdam: John Benjamins Publishing.
- Chapelle, C. A. (Ed.) (2000). *TESOL Quarterly, Volume 34, Number 3. Special Issue: TESOL in the 21st Century*.
- Douglas, D., & Chapelle, C. (Eds.) (1993). *A new decade of language testing*, Alexandria, VA: TESOL Publications.

Edited Conference Proceedings (2)

- Chapelle, C. A., Jun, H. S., and Katz, I. (Eds.) (2009). *Developing and evaluating second language learning materials*. Ames, IA: Iowa State University.
- Chapelle, C. A., Chung, Y.-R. & Xu, J. (Eds.) (2008). *Towards adaptive CALL: Natural language processing for*

diagnostic language assessment. Ames, IA: Iowa State University.

Book Chapters (Selected)

- Chapelle, C. A. (forthcoming). Conceptions of Validity. In G. Fulcher & F. Davidson (Eds.) *Handbook of Second Language Testing*. Mahwah, NJ: Routledge
- Chapelle, C. A. (2011) Validation in Language Assessment. In E. Hinkle, Ed.) *Handbook of Research in Second Language Teaching (Second Edition)*, (pp. 717-730). Mahwah, NJ: Routledge.
- Chapelle, C. A. (2009) Computer-Assisted Language Learning. In Kaplan, R. (Ed.) *Handbook of Applied Linguistics*. Oxford: Oxford University Press.
- Chapelle, C. A. (2009). Computer assisted language teaching and testing. In M. Long and C. Doughty, (Eds), *Handbook of second and foreign language teaching*, (pp. 628-644). Malden, MA: Blackwell Publishing.
- Chapelle, C. A., Enright, M. K. & Jamieson, J. (2008). Test score interpretation and use. In C. Chapelle, M. Enright, & J. Jamieson, (Eds.), *Building a validity argument for the Test of English as a Foreign Language*, (pp. 1-25). London: Routledge.
- Chapelle, C. A. (2008). The TOEFL validity argument. In C. Chapelle, M. Enright, & J. Jamieson, (Eds.), *Building a validity argument for the Test of English as a Foreign Language*, (pp. 319-352) London: Routledge.
- Chapelle, C. A. (2008). Utilizing technology in language assessment. In E. Shohamy, Ed., *Encyclopedia of language education*, 2nd Edition: Volume 7. Language testing and assessment, (pp. 123-134). Heidelberg, Germany: Springer.

Articles in Refereed Journals (Selected)

- McCormick, J.M., Chapelle, C.A. (forthcoming). Measuring whether Canadian Studies courses make a difference in knowledge of Canada. *American Review of Canadian Studies*.
- Chapelle, C. A., & Chung, Y-R. (2010). The promise of NLP and speech recognition technologies in language assessment. *Language Testing (Special Issue)*, 27(3), 301–315.
- Jamieson, J., & Chapelle, C. A. (2010). Evaluating CALL Use Across Multiple Contexts. *System*, 38, 357-369.
- Chapelle, C.A., Yoo-Ree Chung, Y-R., Hegelheimer, V., Pendar, N., & Xu, J. (2010). Designing a computer-delivered test of productive grammatical ability. *Language Testing*, 27(4), 443-469.
- Chapelle, C. A., Enright, M. E., & Jamieson, J. (2010). Does an argument-based approach to validity make a difference? *Educational Measurement: Issues and Practice*, 29(1), 3–13.
- Chapelle, C. A. (2010). The spread of computer-assisted language learning. *Language Teaching*, 43, 66-74.
- Chapelle, C. A. (2009). The relationship between SLA theory and CALL. *Modern Language Journal*, 93(4), 742-754.
- Chapelle, C. A. (2009). A hidden curriculum in language textbooks: Are beginning learners of French at U.S. universities taught about Canada? *Modern Language Journal*, 93(2), 139-152.
- Chapelle, C. A. (2009). The spread of computer-assisted language learning. *Language Teaching*, 43(1), 66–74.
- Chapelle, C. A., & Heift, T. (2009). Individual learner differences in CALL: The FID construct. *CALICO Journal*, 26(2), 246-266.
- Pendar, N., & Chapelle, C. A., (2008). Investigating the promise of learner corpora. *CALICO Journal*, 25(2), 189–206.

Invited Research Presentations (Selected)

- Chapelle, C. A. (2010). La présentation du Canada et du Québec dans les cours de français pour les Américains. Lecture at Université Laval, Québec, Canada. November 29.
- Chapelle, C. A. (2009). Research and Development for the TOEFL iBT®. Paper presented at the TOEFL Research Symposium, Educational Testing Service, Princeton, NJ, September 21.
- Chapelle, C. A. (2009). Why computer technology for TESOL? Lecture presented at the Department of Foreign Languages, Texas Tech University, Lubbock, TX, February 12.
- Chapelle, C. A. (2007). The hidden curriculum in language learning materials: What are beginning French learners in the US taught about Canada? Lecture presented at the Language Research Centre, University of Calgary, May 2.
- Chapelle, C. A. (2005). Technology and L2 pedagogy: Suggestions from research. APPLE Lecture, Columbia University, April 22.

Chapelle, C. A. (2004). Learning through online communication: Findings and implications from second language research. Seminar in the series on Researching Dialogue and Communities of Enquiry in Elearning in Higher Education at the University of York, England, December 7.

External Grants and Contracts

Natural language processing for diagnostic language assessment: Proposal for the fifth annual Technology and Second Language Learning conference at Iowa State University. Funded by the TOEFL Grants Program, Educational Testing Service, Princeton, New Jersey, 2007. (\$15,000)

Comparison of English vocabulary and listening development for learners in an intensive face-to-face curriculum vs. a blended curriculum including a language technology center. Funded by ELS Centers, 2007.

Does French language study promote Canadian Studies in the United States? Funded by the Canadian Embassy, 2007. (\$5000)

Effects of online language learning on development of ESL speaking and listening. Funded by Berlitz, 2006.

Empirical evaluation of CALL use for ESL students' learning processes and outcomes. Funded by the TESOL International Research Foundation (with J. Jamieson), October 2004-December 2005. (\$25,000)

Data analysis for on-line ESL tests. Funded by Pearson Education, (with J. Jamieson) December, 2002.

Test Your English, contract from Pearson Education for development of Web-based ESL testing (with J. Jamieson), 2000-2001.

Faculty Enrichment Grant, awarded by the Canadian Embassy, Washington, D.C., (with J. McCormick), 1999.

Invited Keynote Addresses (Selected)

Chapelle, C. A. (2009). Framing L2 Technology Studies. SLA Symposium, University of Iowa, Iowa City, April 17-18

Chapelle, C. A. (2009). Evaluating technology for language learning. TexFLEC Conference, University of Texas at Austin, April 4

Chapelle, C. A. (2008). Computer technology for English language learners. Texas TESOL. Dallas, Nov. 7-8.

Chapelle, C. A. (2008). The spread of technology for language learning. The Canadian Association of Applied Linguistics. Vancouver, June 5-7.

Chapelle, C. A. (2007). Moodle as the answer: Who asked the question? Conference on Open Source in Education and Language Learning Online Special Theme: The Problem of Language Learning Online—Is Moodle the Answer? University of Iceland, Reykjavik, September 28-29.

Chapelle, C. A. (2007). Technology for second language learning. EPLE Conference, Villahermosa, Tabasco, Mexico, March 7-9.

Chapelle, C. A. (2005). ICT: New opportunities for L2 researchers. AESLA 2005—Congreso de la Asociación Española de Lingüística Aplicada, La Universitat de les Illes Balears, Palma, March 10-12.

Chapelle, C. A. (2004). Expanding the scope of instructed SLA through technology. Applied Linguistics Association of Korea, Seoul, Korea, December 3-4.

Chapelle, C. A. (2004). Hints about CALL use from research. PacCALL Conference, Singapore, Dec. 1-3.

Chapelle, C. A. (2004). Autonomy meets individualization in CALL. 1^{er} Congr s Internacional TIC i Autonomia Aplicades a l'Aprenentatge de Lleng ies (TAAAL), Universitat Jaume I, Castell , Spain, May 26-28.

Chapelle, C. A. (2002). Moving forward with CALL research. CALL Professionals and the Future of CALL Research, Antwerp, Belgium August 18-20.

Chapelle, C.A. (2001). Applied Linguistics and CALL: English Language Teaching and Technology. The Annual Conference of Japan Association of Language Education and Technology, August 3-5, 2001, Nagoya, Japan.

Chapelle, C. A. (2001). Language assessment in the 21st century: What language teachers need to know? Moroccan Summer Institute for EFL Teachers. Rabat, Morocco, July 8-20.

Chapelle, C. A. (2001). Language testing methods: Can technology help? Moroccan Summer Institute for EFL Teachers. Rabat, Morocco, July 8-20.

Chapelle, C. A. (2000). Innovative language learning: Achieving the vision. Paper presented at *EuroCALL 2000, Innovative Language Learning in the Millennium*, University of Abertay Dundee, Scotland, Aug. 31–Sept. 2.

Chapelle, C. A. (2000). CALL in the 21st century: Looking back on research to look forward for practice. CALL for the 21st Century ESADE/IATEFL Joint Conference, Barcelona, Spain, June 31 - July 2.
Chapelle, C. A. (2000). Second language acquisition through virtual environments. Environnements virtuels et apprentissage des langues. Troisième Colloque des Usages des Nouvelles Technologies dans l'Enseignement des Langues Etrangères à l'Université de Technologie de Compiègne, 23 - 25 mars 2000.

IOWA STATE UNIVERSITY SERVICE

Administration

Chair, Cross-disciplinary program in Linguistics, College of LAS (2004-present)
Coordinator, Ph.D. in Applied Linguistics & Technology Proposal, Department of English (AY 2003-04)
Coordinator, Publicity for TESL/AL, Department of English (1999-2004)

Hiring and Retention

Chair, Search Committee for faculty in CALL, corpus and computational linguistics, and other areas of applied linguistics, Department of English (AY 1996-97, 2001-02, 2004-05, 2007-08 & 2008-09)
Mentor for New Faculty, Provost's Mentoring Program (AY 1996-97 (Susan Conrad, tenured 2003), 1998-99 (Volker Hegelheimer, tenured 2007), 2002-03 (Viviana Cortes, tenured 2008), 2005-06 (Nick Pendar), 2007-08 (Cristina Pardo Ballester)

International Agreements

Coordinator, Agreement with University of Concepcion, Chile (with D. Bratch-Prince), 2003-present.
Coordinator, Exchange Program between Iowa State and Université Laval (with C. Thogmartin), 1998-present.

Committees

Member, Budget Advisory Group, College of LAS (2009-2010).
Member, Human Subjects Committee (1997-2000).
Member, Ad hoc Virtual Course Group (AY 1997-98).

5/11

Jamal Abedi

Professor

Graduate School of Education, University of California, Davis



Country of Citizenship

United States

Educational History

Post-Doctoral 1978-1979, University of California, Los Angeles. Research Methods and Evaluation

1977, University of California, Los Angeles. Summer tin Research Methods and Evaluation

Ph.D. 1974, George Peabody College of Vanderbilt University
Specialization: Psychology (psychometrics)

MA 1971, George Peabody College of Vanderbilt University
Specialization: Psychology (statistics and measurement)

Professional Experience

July 2005 -Pre Professor (Step V, since July 2009), University of California, Davis.

July 2005 -Pre Emphasis Area Representative (Head): Learning and Mind Sciences. University of California, Davis, School of Education.

July 2007 - Sep 2008 Chair of the Faculty, University of California, Davis, School of Education

- July 2005-Pre Research Partner, Center for the Study of Evaluation, National Center for Research on Evaluation, Standards, and Student Testing, Graduate School of Education & Information Studies, University of California, Los Angeles
- 1991-2005 Director of Technical Projects, Center for the Study of Evaluation, National Center for Research on Evaluation, Standards, and Student Testing.

Professional Activities

- 2008-Pre National Research Council of The National Academies: Member of Panel to Review Alternative Data Sources for Limited-English Proficiency Allocation Formula under the Title III. Part A, Elementary and Secondary Education Act.
- 2006 - Pre Member of the Technical Advisory Group of Colorado Department of Education .
- 2007- Pre Member of the Technical Advisory Group of South Carolina Department of Education
- 2001- Pre Member of the Technical Advisory Group of New Mexico Department of Education
- 2005-Pre Member of the Technical Advisory Group of the Western Regional Educational Laboratory (WREL, WestEd)
- 2004 - Pre Co-Principal Investigator of the National Accessible Reading Assessment.

Project management / Grants

- Sept 2010-Oct 2014: Principal Investigator of a grant from the National Science Foundation: *Formative Assessment in Mathematics: Current Status and Guidelines for Future Developments*. Project Period: Five years, total budget \$3.1 Million
- September 2008-Present: Principal investigator of a grant from the National Science Foundation: *Evaluation of the Edward Teller Education Center (ETEC), Teacher Research Academy (TRA)*. Project Period: Four years, total budget \$280,000
- October 2006-Present: Co-principal investigator, a grant from the Institute of Education Sciences, U.S. Department of Education *to examine issues concerning ELL assessments*. Project Period: Three years, total budget \$380,000
- October 2004 - Present: Co-principal investigator. *The National Accessible Reading Assessment Project (NARAP)*. A 5-year grant from the U.S. Department of Education. Project Period: Five years, total budget \$720,000

February 2004-2006: Project Director, a grant from the National Center for Education Statistics (NCES) to *lead national efforts on research on Language Minority Children using NCES databases (ECLS and NHES)*. Project Period: Two years, total budget \$350,000

RECENT PUBLICATIONS:

Book Chapters:

- Abedi, J. (2010). *Linguistic Factors in the Assessment of English Language Learners*. In Walford, G., Tucker, E., & Viswanathan, M. *The Sage Handbook of Measurement*. Sage Publication. Oxford.
- Abedi, J. (2010). *Comparability Issues for the Alternate Assessment Based on Modified Achievement Standards* In: Perie, M. *Teaching and Assessing Low-Achieving Students With Disabilities*. Baltimore: Paul Brookes Publishing Co.
- Abedi, J. (2010). *Performance assessments for English language learners and students with disabilities*. In Darling Hammond. *Handbook of Performance Assessment*. Palo Alto: Stanford University.
- Abedi, J. (2010). *Assessing English Language Learners and/or Bilingual Students: Critical Issues* (Chapter 3). In Basterra, M., Solano-Flores, G., and Trumbull, E. *Assessment, Language, and Culture: A Guide for Teachers*. (Ed.). Mahwah, New Jersey: Lawrence Erlbaum Associates, Publishers
- Abedi, J. (in preparation). *Testing of ELL Students* (Chapter 101). In: Geisinger, K., F. *APA Handbook of Testing and Assessment in Psychology*.
- Abedi, J. (in preparation). *Language Issues in the Design of Accessible Items*. In: Elliott, S., N., Kettler, R. J., Beddow, P. A., & Kurz., A. *Accessible Tests of Student Achievement: Issues, Innovations, and Applications*. Springer Publisher
- Abedi, J. (in preparation). *Validity issues in designing accommodations* In: Fulcher, G. and Davidson, F. *The Routledge Handbook of Language Testing*

Recent Journal articles:

- Abedi, J.; Herman, J.L. (2010). *Assessing English Language Learners' Opportunity to Learn Mathematics: Issues and Limitations*. *Teachers College Record* Volume 112, Number 3, March 2010, pp. 723–746
- Abedi, J. (2010). *English Language Learners with Disabilities: Classification, Assessment, and Accommodation Issues*. *Journal of Applied Testing Technology*

Abedi, J. Kao, J.; Leon, S.; Mastergeorge, A.; Sullivan, L.; Herman, J.; and Pope, R. (2010). Accessibility of Segmented Reading Comprehension Passages for Students with Disabilities. *Applied Measurement in Education*. Volume 23, Number 2, 168-186.

Abedi, J., & Cook, L. (Eds.). (in press). Accessible Reading Assessments for Students With Disabilities [Special Issue]. *Applied Measurement in Education*.

Cook, L. & Abedi, J. (Eds.). (2010). Measurement Issues for Students With Disabilities [Special Issue]. *Journal of Applied Testing Technology*.

Recent Research, evaluation reports and conference papers

Abedi, J.; Leon, S.; Kao, J. C.; Leon, S.; Bayley, R.; Ewers, N.; Herman, J.L.; Mundhenk, K. (2010). *Accessible Reading Assessments for Students with Disabilities: The Role of Cognitive, Grammatical, Lexical, and Textual/Visual Features*. Minnesota: National Center for Educational Outcomes.

Abedi, J.; Ewers, N.; Hejri, F. (2010). *Accommodations for English Language Learners and Students With Disabilities in California*. Sacramento: California Department of Education

Abedi, J. (2010). *English Language Proficiency Testing*. Seoul: Korean Institute for Curriculum and Evaluation (KICE)

Abedi, J. (2010). *Foreign Language Educational Policy and Assessment*. Seoul: Korean Institute for Curriculum and Evaluation (KICE)

Abedi, J.; Kao, J. C.; Leon, S.; Sullivan, L.; Herman, J.L.; Pope, R.; Nambiar, V. Mastergeorge, A. (2009). *Exploring Factors that Affect the Accessibility of Reading Comprehension Assessments for Students with Disabilities: A Study of Segmented Text*. Minnesota: National Center for Educational Outcomes.

Abedi, J., Leon, S. and Kao, J. (2008). *Examining Differential Item Functioning in Reading Assessments for Students with Disabilities*. Los Angeles: University of California, Center for the Study of Evaluation/National Center for Research on Evaluation, Standards, and Student Testing (CSE Report 744).

Recent Papers presented:

Abedi, J. (2010). *Performance Assessments for English Language Learners and Students with Disabilities*. Paper (symposium) presented at the 2010 Annual Meeting of the American Educational Research Association in Denver, Colorado: May 2010.

- Abedi, J. (2010). *Comparability Issues for AA-MAS*. Paper (Structured Poster) presented at the 2010 Annual Meeting of the American Educational Research Association in Denver, Colorado: May 2010.
- Abedi, J. (2010). *Validity of Accommodations for English Language Learners*. Paper (Symposium) presented at the 2010 Annual Meeting of the American Educational Research Association in Denver, Colorado: May 2010.
- Abedi, J. (2010). *Issues Concerning Inclusion of ELL Students Related to Their Level of English Language Proficiency*. Paper (Symposium) presented at the 2010 Annual Meeting of the American Educational Research Association in Denver, Colorado: May 2010.
- Abedi, J., August, D., Liguanti, R. & Rivera, C. (2010). *Exploring Issues in the Development of Uniform Rules for ELL Inclusion on NAEP*. Paper (Symposium) presented at the 2010 Annual Meeting of the American Educational Research Association in Denver, Colorado: May 2010.
- Abedi, J. (2010). *Revising the Joint Standards: Fair and Accessible Assessments for All Individuals*. Discussant at the 2010 Annual Meeting of the American Educational Research Association in Denver, Colorado: May 2010.
- Abedi, J. (2010). Assessment Issues in the Nation. Presented at the U.S. Department of Education, The Race to the Top Assessment Program Public & Expert Input Meeting, January 20, 2010. Washington, D.C..
- Abedi, J. (2009). Assessment of English Language Learners. Presented at the U.S. Department of Education, The Race to the Top Assessment Program Public & Expert Input Meeting, December 2, 2009, Denver, Colorado.
- Abedi, J. (2009). Impact of language factors on the assessment outcomes of English language learners. Presented at the 10th UKFIET International Conference on Education and Development. Oxford: Oxford University.

Professional Organizational Membership:

American Educational Research Association
 National Council on Measurement in Education
 The Mathematical Association of America.

Akihito Kamata

GENERAL INFORMATION

University Address:

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E-mail Address: kamata@uoregon.edu

Professional Preparation

Sept. 1991 to Ph.D., Michigan State University, East Lansing, MI.
Aug. 1998 Major: Measurement and Quantitative Methods. Dissertation: *Some generalizations of the Rasch model by the hierarchical generalized linear model.*

Sept. 1989 to M.S., Eastern Washington University, Cheney, WA. Dec. 1990 Major: Experimental Psychology.

April 1984 to B.Ed., University of Yamanashi, Kofu, Japan. March 1988 Major: Elementary Education and Psychology.

Professional Experience

Sept. 2009 to **Professor** –Department of Educational Methodology, Policy and Leadership, **Current University of Oregon**. Responsibilities include conducting research, teaching graduate-level courses on statistics, educational measurement and psychometrics, and supervising master's studies and doctoral dissertations.

May. 2007 to **Department Chair** –Department of Educational Psychology & Learning Systems, **Florida State University**. Lead and managed a department of 30 faculty members and over 300 graduate students. Administered annual budget of over \$500,000 in general expenses and other personnel expenses than faculty and staff members, and over \$1.2M in tuition waiver expenses. Supervised Associate Department Chair, three program leaders and a clerical staff of 5. Hired new faculty and conducted annual evaluation of extant faculty. Reported to the Dean of the College of Education and carry out assigned duties in addition to the above mentioned duties. Maintained half-time assignment as Associate Professor of Measurement & Statistics.

Aug. 2004 to **Associate Professor** – Measurement & Statistics Program, Department of Educational Psychology & Learning Systems, College of Education, **Florida State University**. Responsibilities include conducting research, teaching graduate-level introductory and advanced psychometrics/statistics courses, and supervising master's studies and doctoral dissertations.

Aug. 1998 to **Assistant Professor** – Measurement & Statistics Program, Department of Educational Psychology & Learning Systems (formerly Department of Educational Research), College of Education, **Florida State University**. Responsibilities

include conducting research, teaching graduate-level introductory and advanced psychometrics/statistics courses, and supervising master's studies and doctoral dissertations.

Membership in Professional Organizations

American Educational Research Association National Council of Educational Measurement
Psychometric Society Florida Educational Research Association

Contracts and Grants Funded

- Kamata, A. Evaluation of the performance of bi-factor model in testlet based computer adaptive reading test. (March 2009 – February 2012; Total award **\$103,511**) This is a subcontract to Foorman, B. Measuring Reading Progress in Struggling Adolescents. Funded by **Institute of Educational Science - U.S. Department of Education** to Florida State University (March 2009 – February 2012). Total award \$1.5M.
- Kamata, A. Differential Item Functioning Analyses for Students with Test Accommodations on NAEP test items. Funded by **Institute of Educational Science - U.S. Department of Education** (July 2003 – May 2005; Award Number: R902B030025). Total award **\$95,163**.
- Kamata, A. Effects of FCAT test items on students with disabilities and English language learners. Funded by **Florida Department of Education** (Oct. 1, 2006 – Aug. 31, 2007; Award Number: 371-90950-7R002). Total award **\$45,000**.
- Lonigan, C. Predoctoral Interdisciplinary Research Training (PIRT) Program in the Education Sciences. Funded by **Institute of Educational Science - U.S. Department of Education** (August 2004 – August 2009). Total award **\$4,986,549**. [I was Program Faculty on this grant.]
- Hassler, L., Tenenbaum, G., & Kamata, A. NROTC Scholarship Selection Model Evaluation and Revision. Funded by **Naval Educational and Training Command** (Oct. 2002 -December 2003; Award Number: N00140-02-Q-3342). Total award **\$1,700,000**.
- Tate, R. & Kamata, A. A Study of Tasks Related to the Florida Comprehensive Achievement Test. Funded by **Florida Department of Education** (May 1999 – Aug. 1999; Award Number: 371-90950-90004). Total award **\$21,952**.
- Kamata, A. Professional Service Related to Student Assessment. Funded by **Leon County School Board** (July 2002 – June 2008). Total award **\$162,150**.
- Kamata, A. Tasks Associated with Large Scale Assessment Programs. Funded by **Florida Department of Education** (Aug. 2008 – Aug. 2009; Award Number: 371-90950-9R001). Total award **\$80,000**.

SCHOLARLY ACTIVITIES

Publications

Refereed Journal Articles

- Patarapichayatham, C., Kamata, A., & Kanjanawasee, S. (in press). Evaluation of model selection strategies for cross-level two-way differential item functioning analysis. *Educational and Psychological Measurement*.
- Patarapichayatham, C., Kamata, A., & Kanjanawasee, S. (2009). Cross-level two-way differential item functioning analysis model by multilevel Rasch modeling. *Journal of Research Methodology & Cognitive Science*, 7, 15-21.
- Li, H., Lee, D., Pfeiffer, S. I., Kamata, A., Kumtepe A. T., & Rosado, J. (2009). Measurement

- invariance of the Gifted Rating Scales among participants from Puerto Rico, China, U.S., Turkey, and South Korea. *School Psychology Quarterly*, 24, 186-198.
- Johnson, M. B., Edmonds, W. A., Kamata, A., & Tenenbaum, G. (2009). Determining individual affect-related performance zones (IAPZs): A tutorial. *Journal of Clinical Sport Psychology*, 3, 34-57.
- Edmonds, W. A., Tenenbaum, G., Kamata, & Johnson, M. (2009). The role of collective efficacy in adventure racing teams. *Small Group Research*, 40, 163-180.
- Kamata, A. & Bauer, D. J. (2008). A note on the relationship between factor analytic and item response theory models. *Structural Equation Modeling*, 15, 136-153.
- Bilir, M. K., Binici, S., & Kamata, A. (2008). Growth mixture modeling (GMM): Application to reading achievement data from a large scale assessment. *Measurement and Evaluation in Counseling and Development*, 41, 104-117.
- Edmonds, W. A., Tenenbaum, G., Mann, D. T. Y., Johnson, M., & Kamata, A. (2008). The effects of biofeedback training on affective regulation and simulated race car performance: A multiple case study analysis. *Journal of Sport Sciences*, 26, 1-13.
- Johnson, M. B., Edmonds, W. A., Tenenbaum, G., & Kamata, A. (2007). The relationship between affect and performance in competitive intercollegiate tennis: A dynamic conceptualization and application. *Journal of Clinical Sports Psychology*, 1, 10-146.
- Chaimongkol, S., Huffer, W. F., & Kamata A. (2007). An explanatory different item functioning (DIF) model by the WinBUGS 1.4. *Songklanakarinn Journal of Science and Technology*, 29, 449-458.
- Chaimongkol, S., Huffer, W. F., & Kamata A. (2006). A Bayesian approach for fitting a random effect differential item functioning across group units. *Thailand Statistician*, 4, 27-41.
- Golden, A.S., Tenenbaum, G., & Kamata, A. (2004) Affect-related performance zones: An ideographic method for linking affect to performance. *International Journal of Sport & Exercise Psychology*, 2, 42-60.
- Kitsantas, A., Gilligan, T. D., & Kamata, A. (2003). College women with eating disorders: Self-Regulation, Life Satisfaction, and Positive/Negative Affect. *The Journal of Psychology*, 137, 381-395.

Manuscript Under Review

- Jiao, H., Kamata, A., Wang, S., & Jin, Y. (submitted). Modeling local dependence using multilevel Rasch measurement model. Under review by *Journal of Educational Measurement*.
- Fukuhara, H. & Kamata, A. (submitted). A bi-factor multidimensional item response theory model for differential item functioning analysis on testlet-based items. Under review by *Applied Psychological Measurement*.
- Jiao, H. & Kamata, A. (submitted). Effects of model specification error in computerized classification test using sequential probability ratio test. Under review by *Educational and Psychological Measurement*.

Cheong, Y. F., & Kamata, A. (submitted). A comparison of DIF detection procedures using hierarchical generalized linear and nonlinear mixed models. Under review by *Journal of Applied Measurement*.

Books

Tenenbaum, G., Eklund, R. C., & Kamata, A. (Eds.) (in press). *Handbook of Measurement in Sport and Exercise Psychology*. Champaign, IL: Human Kinetics.

Abell, N., Springer, D. W., & Kamata, A. (2009). *Developing and Validating Rapid Assessment Instruments*. Oxford University Press.

Book Chapters

Vaughn, B. K., & Kamata, A. (in press). Reliability. In G. Tenenbaum, R. C. Eklund, & A. Kamata (Eds.), *Handbook of Measurement in Sport and Exercise Psychology*. Champaign, IL: Human Kinetics.

Kamata, A. & Vaughn, B. K. (2011). Multilevel Item Response Theory Modeling. In *Handbook of Advanced Multilevel Analysis*. J. Hox & J. K. Roberts (Ed.). New York: Routledge.

Kamata, A., Bauer, D. J., & Miyazaki, Y. (2008). Multilevel Measurement Model. In A. A. O'Connell & D. B. McCoach (Eds.). *Multilevel Analysis of Educational Data*. (pp.345-388). Charlotte, NC: Information Age Publishing.

Kamata, A. & Cheong, F. (2007). Multilevel Rasch model. In M. von Davier & C. H. Carstensen (Eds.). *Multivariate and mixture distribution Rasch models: Extensions and applications* (pp. 217-232). New York: Springer.

Tenenbaum, G., Kamata, A., & Hayashi, K. (2007). Measurement in sport and exercise psychology: A new Outlook on selected issues of reliability and validity. In G. Tenenbaum & R. C. Eklund (Eds.), *Handbook of Sport Psychology* (3rd ed) (pp.757-773). Hoboken, NJ: Wiley.

Non-Refereed Publications Completed

Kamata, A. (2007). *Effects of FCAT test items on students with disabilities and English language learners*. Florida Department of Education, August 2007 (Award Number: 371-909507R002).

Kamata, A. & Genc, E. (2005). *A study of DIF for students with testing accommodations and its random effect for some NAEP science and mathematics assessment items*. Institute of Education Sciences, U.S. Department of Education (Award # R902B030025).

Hassler, L., Kamata, A., Tenenbaum, G., Urena, C., & Alfano, C. (2004). *NROTC Scholarship Selection Model: Overview and Evaluation Report*. Naval Education and Training Command. (Award # N00140-02-Q-3342).

Tate, R. L., & Kamata, A. (1999). *Recommendations for the Future of FCAT*, Florida Department of Education, October, 1999 (Award # 371-90950-90004).

SERVICE

University of Oregon

University

- Off-Campus Scholarship and Grants Committee (member, 2009-2010)

College of Education

- Faculty Personnel Committee (Chair, 2009-2010)
- Quantitative Methods Courses Committee (member, 2009-2010)

Department of Educational Methodology, Policy and Leadership

- Search Committee for a faculty position in Educational Technology (Chair, 2009-2010)

Florida State University

University

- Graduate Policy Committee; Sub-committee for the GPC review of the Demography program (2006)
- University Library Committee (2001-2004)

College of Education

- Tenure & Promotion Committee (member, 2007)
- Faculty Council (chair-elect, 2004; chair, 2005)
- Evaluation Committee (member, 2000)
- Curriculum Committee (alternate member, 2000)

Department of Educational Psychology & Learning Systems

- Search Committee for an open-rank faculty position in Measurement & Statistics (chair, 2003)
- Search Committee for two assistant professor faculty positions in Measurement & Statistics (member, 2005, 2006)
- Search Committee for a faculty position in Program Evaluation (member, 1999, 2000)
- Annual Evaluation Committee (member, 1999, 2000, 2003, 2004; Chair 2006)
- Ad hoc committee for graduate student recruiting (1999, 2000)
- Ad hoc committee for computing facilities for Measurement & Statistics students (1999, 2000)

Carol M. Myford, Ph.D.

University of Illinois at Chicago
1040 W. Harrison St., MC 147
Chicago, IL 60607

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EDUCATION

1989	University of Chicago	Ph.D	Measurement, Evaluation, and Statistical Analysis
1980	University of Georgia	M.A.	Educational Psychology (graduated with distinction)
1973	Hiram College	B.A.	Psychology, Music Education (graduated summa cum laude)

AWARDS

2009-2014	Fulbright Senior Specialist, Council for International Exchange of Scholars, Institute of International Education
2006	Teaching Recognition Award, University of Illinois at Chicago, Council for Excellence in Teaching and Learning
1995-1996	ETS Scientist Award (recognizing outstanding contributions to my field of specialization and to the work of ETS)
1989	Dissertation with Honors, University of Chicago
1985-1988	University of Chicago Unendowed Scholarship
1986	Award of Honors, Preliminary Examinations in Measurement, Evaluation, and Statistical Analysis, University of Chicago
1986	The Carolyn Hoefer Memorial Award in recognition of excellent academic achievement in the first year of doctoral studies, University of Chicago

EMPLOYMENT HISTORY

2002-present	Associate Professor of Educational Psychology, Focus in Measurement, Evaluation, Statistics, and Assessment, College of Education, University of Illinois at Chicago, Chicago, IL
1998-2002	Senior Research Scientist, Educational Testing Service, Center for Measurement Models, Princeton, NJ
1993-1998	Research Scientist, Educational Testing Service, Center for Performance Assessment, Princeton, NJ

Teaching Experience

2002-present	Associate Professor, University of Illinois at Chicago, teach seven courses: Educational Program Evaluation, Assessment for Measurement Professionals, Assessment for Teachers, Assessment for School Leaders, Large-Scale Testing, Approaches to the Analysis of Rating Data, and Assessment in the Urban Elementary Classroom.
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1998-1999 Trainer, ETS, designed and taught a course to ETS statisticians on running FACETS analyses and interpreting output.

Consulting Experience

2010-present Consultant, The American Board of Orthopaedic Surgery
2009-present Consultant, The Accreditation Council for Graduate Medical Education
2009-present Consultant, Measurement Research Associates, Inc.
2008-present Member, Technical Advisory Committee, ACCESS for ELLs (English Language Learners), WIDA Consortium, University of Wisconsin-Madison
2007-present Member, Technical Advisory Committee, Gwinnett County Public Schools Assessment Program, Suwanee, GA

GRANTS

2001 The Advanced Placement English Literature and Composition Assessment

Principal Investigators: Dr. Edward W. Wolfe, Dr. George Engelhard, Jr. and Dr. Carol M. Myford
Proposal Title: *Monitoring Reader Performance and DRIFT in the AP English Literature and Composition Exam Using Benchmark Essays*
Project Role: Co-Project Director
Funding Source: Advanced Placement Research and Development Committee, The College Board and Educational Testing Service (\$133,100)

1999 The Advanced Placement English Literature and Composition Assessment

Principal Investigators: Dr. George Engelhard, Jr. and Dr. Carol M. Myford
Proposal Title: *Monitoring Reader Performance in the Advanced Placement Program with a Many-faceted Rasch Model*
Project Role: Co-Project Director
Funding Source: Advanced Placement Research and Development Committee, The College Board and Educational Testing Service (\$97,100)

1998 The Assessment Futures Project

Principal Investigators: Dr. Howard Everson, Dr. Henry Braun, Dr. Carol M. Myford, Dr. Len Swanson, Dr. Richard Swartz, Dr. Isaac Bejar, Dr. Wayne Camara
Proposal Title: *Assessment Futures: A Proposal to Build the Research Foundations for the Continued Leadership of The College Board and Educational Testing Service*
Project Role: Proposal Writer
Funding Source: The College Board and Educational Testing Service (\$3,000,000)

1998 The Graduate Management Admission Test (GMAT)

Principal Investigators: Dr. Carol M. Myford, Dr. Jill Burstein, Dr. Karen Kukich, and Mr. Fred Ciine
Proposal Title: *Looking for Patterns in Disagreements: A FACETS Analysis of Human Raters and E-rater's Scores on Essays Written for the Graduate Management Admission Test (GMAT)*
Project Roles: Proposal Writer, Co-Project Director
Funding Source: ETS Research Allocation (\$75,600)

1998 The National Board for Professional Teaching Standards

Principal Investigators: Dr. Carol M. Myford and Dr. George Engelhard, Jr.
Proposal Title: *A Proposal to Investigate Assessor Effects in National Board for Professional Teaching Standards Assessments for Middle Childhood/Generalist Teachers and for Early Childhood/Generalist Teachers*
Project Roles: Proposal Writer, Co-Project Director
Funding Source: National Board for Professional Teaching Standards (\$80,000)

1997 The Praxis Series: Professional Assessments for Beginning Teachers

Principal Investigators: Dr. Carol M. Myford, Dr. Gwyneth Boodoo, and Dr. Edward W. Wolfe
Proposal Title: *An Investigation of Examinee Performance on Essay Questions and Test Forms That Were Designed to be Comparable*
Project Roles: Proposal Writer, Co-Project Director
Funding Source: Educational Testing Service (\$135,000)

PROFESSIONAL ACTIVITIES

Editorial and Reviewer Responsibilities

2008-present Advisory Editor, *Journal of Educational Measurement*
1999-present Member, Editorial Review Board, *Journal of Applied Measurement*
1995-2001 Member, Educational/Psychological Editorial Board, *Journal of Outcome Measurement*
2010-present Reviewer, *Academic Medicine*
2010-present Reviewer, *Educational Research and Evaluation*
2010-present Reviewer, *Assessment in Education: Principles, Policy & Practice*
2008-present Reviewer, *American Journal of Occupational Therapy*
2000-present Reviewer, *Journal of Educational and Behavioral Statistics*
1999-present Reviewer, *Journal of Applied Measurement*
1995-present Reviewer, *Journal of Educational Measurement*
1995-present Reviewer, *American Journal of Education*
1995-present Reviewer, *Applied Psychological Measurement*
1995-present Reviewer, proposals for ETS, AERA, NCME, Australian Research Council, Spencer Foundation, National Center for Education Statistics of the U.S. Dept. of Education Office of Educational Research and Improvement, Rasch Measurement SIG of AERA

Affiliations

American Educational Research Association
Kappa Delta Pi (National Education Honorary)
National Council on Measurement in Education
Phi Beta Kappa
Rasch Measurement SIG (Special Interest Group) of AERA

RECENT PUBLICATIONS

Refereed Journal Articles

- Winke, P., Gass, S., & Myford, C. M. (under review). Raters' L2 background as a potential source or bias in rating oral performance. *Language Testing*.
- Dymnicki, A., Henry, D., & Myford, C. M. (under review). The development of an instrument to measure school readiness for a prevention program. *Journal of Applied Measurement*
- Myford, C. M., & Wolfe, E. W. (2009). Monitoring rater performance over time: A framework for detecting differential accuracy and differential scale category use. *Journal of Educational Measurement, 46*(4), 371-389.
- Houston, J. E., & Myford, C. M. (2009). Judges' perception of candidates' organization and communication, in relation to oral certification examination ratings. *Academic Medicine, 84*(11), 1603-1609.
- Engelhard, G., & Myford, C. M. (2009). Comparison of single- and double-assessor scoring designs for the assessment of accomplished teaching. *Journal of Applied Measurement, 10*(1), 52-69.
- Iramaneerat, C., Myford, C., Yudkowsky, R., & Lowenstein, T. (2008, Nov. 5). Evaluating the effectiveness of rating instruments for a communication skills assessment of medical residents. *Advances in Health Sciences Education* [published online]
- Iramaneerat, C., Yudkowsky, R., Myford, C., & Downing, S. (2008). Quality control of an OSCE using generalizability theory and many-faceted Rasch measurement. *Advances in Health Sciences Education, 13*(4), 479-493.

Refereed Research Reports

- Winke, P., Gass, S., & Myford, C. M. (2011). *The relationship between raters' prior language study and the evaluation of foreign language speech samples*. (TOEFL iBT™ Research Report). Princeton, NJ: The Educational Testing Service.
- Wolfe, E. W., Myford, C. M., Engelhard, G. E., & Manalo, J. R. (2007). *Monitoring reader performance and DRIFT in the AP English Literature and Composition examination using benchmark essays*. (College Board Research Report No. 2007-2). New York: The College Board.
- Engelhard, G., Jr., & Myford, C. M. (2003). *Monitoring faculty consultant performance in the Advanced Placement English Literature and Composition program with a many-faceted Rasch model* (College Board Research Report No. 2003-1). New York: The College Board.

Engelhard, G., Jr., Myford, C. M., & Ciine, F. (2000). *Investigating assessor effects in National Board for Professional Teaching Standards assessments for Early Childhood/Generalist and Middle Childhood/Generalist certification* (ETS Research Report RR-00-13). Princeton, NJ: Educational Testing Service.

Myford, C. M., & Wolfe, E. W. (2000). *Monitoring sources of variability within the Test of Spoken English assessment system* (TOEFL Research Report No. 65). Princeton, NJ: TOEFL Research Program, Educational Testing Service.

Myford, C. M., & Wolfe, E. W. (2000). *Strengthening the ties that bind: Improving the linking network in sparsely connected rating designs* (TOEFL Technical Report No. 15). Princeton, NJ: TOEFL Research Program, Educational Testing Service.

Refereed Book Chapters

Myford, C. M., & Wolfe, E. W. (2004). Detecting and measuring rater effects using many-facet Rasch measurement: Part I. In E. V. Smith, Jr. & R. M. Smith (Eds.), *Introduction to Rasch measurement* (pp. 460-517). Maple Grove, MN: JAM Press.

Myford, C. M., & Wolfe, E. W. (2004). Detecting and measuring rater effects using many-facet Rasch measurement: Part II. In E. V. Smith, Jr. & R. M. Smith (Eds.), *Introduction to Rasch measurement* (pp. 518-574). Maple Grove, MN: JAM Press.

Myford, C. M., & Sims-Gunzenhauser, A. (2004). The evolution of large-scale assessment programs in the visual arts. In E. W. Eisner & M. D. Day (Eds.), *Handbook of research and policy in art education* (pp. 637-666). Mahwah, NJ: Lawrence Erlbaum Associates.

Book Reviews

Myford, C. M. (2004). [Review of the book *Automated Essay Scoring: A Cross-Disciplinary Perspective*]. *Journal of Applied Measurement*, 5(1), 111-114

Myford, C. M. (1996). [Review of the book *Authentic Assessment in Action: Studies of Schools and Students at Work*]. *American Journal of Education*, 104(2), 162-165.

RECENT PRESENTATIONS

Conference Papers

Brown, R., & Myford, C. M. (2011, April). *Investigating method effects in medical specialty certification organization performance assessments*. Paper presented at the annual meeting of the National Council on Measurement in Education, New Orleans, LA.

Austin S., & Myford, C. M. (2010, April). *A study of assessment theory and practice within the Cognitive Disabilities Model: A many-faceted Rasch analysis of the Allen Diagnostic Module Placemat Task*. Paper presented at the annual conference of the American Occupational Therapy Association, Orlando, FL.



May 20, 2011

Tony Evers, PhD
State Superintendent
Wisconsin Department of Public Instruction
125 S. Webster Street
Madison, WI 53707

Re: Letter of Support for EAG Proposal

Dear Dr. Evers:

The Wisconsin Center for Education Research (WCER) is pleased to be included as the managing partner for **Assessment Services Supporting ELs through Technology Systems (ASSETS)**, an Enhanced Assessment Grant proposal. WCER is home to the current WIDA Consortium of 27 states, and as you know, WIDA is the recognized leader in innovative approaches to standards and assessments for English learners (ELs).

The experience of staff who work at WCER/WIDA in research and development for assessing ELs will prove invaluable to the success of this project. We will be pleased to work with Wisconsin DPI over the grant period to ensure that the new consortium is vibrant and active, and has a standards and assessment system for ELs that is innovative, technology-based, and interoperable with the academic assessment consortia.

Sincerely,

(b)(6)

Adam Gamoran, Ph.D.
Director
Wisconsin Center for Education Research
University of Wisconsin-Madison



CENTER FOR APPLIED LINGUISTICS

4646 40TH STREET NW • WASHINGTON DC 20016-1859 • (202) 362-0700 • fax (202) 362-3740 • www.cal.org

May 18, 2011

Ms. Lynette Russell
Director of Educational Accountability
Wisconsin Department of Public Instruction
125 S. Webster Street
Madison, WI 53707-7841

Dear Ms. Russell:

The Center for Applied Linguistics (CAL) is pleased to submit this letter of support for the proposal that the Wisconsin Department of Public Instruction (WDPI) is submitting to the U. S. Department of Education's Enhanced Assessments Instruments Grants Program, CFDA No. 84.368. The proposal outlines plans for development of a technology-based assessment system for English learners, Assessment Services Supporting ELs through Technology Systems (ASSETS). ASSETS will provide a comprehensive, cutting-edge set of assessment tools that includes an annual summative assessment; classroom benchmarks for student learning; an on-demand screener; and formative assessment resources, all disseminated electronically.

CAL has a rich history in the development, implementation, and evaluation of assessment instruments designed to measure the English language and academic achievement of K-12 English language learners. CAL's 50-plus years of experience connecting language, education, and culture have solidified its expertise in the factors that enable educational programs to assess English language learners effectively; CAL's work with such programs has included professional development and technical assistance as well as development and provision of assessment instruments. In carrying out the proposed project, CAL will build on its successful prior work with WDPI and the WIDA Consortium in the development of the ACCESS for ELLs and MODEL series of assessments.

CAL looks forward to collaborating with WDPI on this important project, and is confident that the partnership will produce significant results for the Department of Education.

Sincerely,

(b)(6)

Terrence Wiley
President



excellence in research, development, and service

May 25, 2011

Ms. Lynette Russell, Director of Educational Accountability
Wisconsin Department of Public Instruction
125 S. Webster Street
Madison, WI 53707-7841

Dear Ms. Russell:

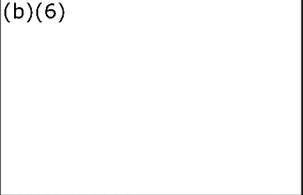
WestEd is pleased to extend its support and commitment to working with you and the *Assessment Services Supporting ELs through Technology Systems (ASSETS)* consortium of states and partners, in response to the Enhanced Assessment Instruments Grants Program call for applications (CFDA Number 84.368). We strongly support the goals and objectives of this important work and are pleased to be a partner.

We are particularly impressed with the management leadership and the strong team that has been assembled to carry out the proposed scope work, and we are confident that the work will be completed with high quality and to the satisfaction of its funder, the U.S. Department of Education, the consortium of states, and the states' educators. We are pleased, in particular, to contribute to this partnership our expertise and resources in areas that include academic language, access and accommodations, interoperability, professional development, and research, in order to help successfully meet the goals and objectives of this proposed scope of work.

If you have any technical questions, please contact Dr. Edynn Sato at 415-615-3226 or via email at esato@wested.org.

For contractual questions, please contact the Contracts Management Department at 415-615-3136 or via email at contracts@wested.org.

We look forward to working with you on this project. The outcomes of this proposed scope of work will be very important to state educators and students, and we very much support this effort.

Sincerely,


Michael J. Neuenfeldt
Director, Contracts Management

cc: Edynn Sato, Director, Research and ELL Assessment for ASDS and Director, Special Populations for AACC
ITP #3588



OFFICE OF CONTRACT AND GRANT ADMINISTRATION
BOX 951406
11000 KINROSS, SUITE 211
LOS ANGELES, CALIFORNIA 90095-1406

PHONE: (310) 794-0102
FAX: (310) 794-0631

www.research.ucla.edu/ocga

May 27, 2011

University of Wisconsin - Madison
Wisconsin Center for Educational Research
ATTN: Becki Kohl
1025 W. Johnson Street, MD #23
Madison, WI 53706

Dear Becki:

On behalf of The Regents of the University of California, please find enclosed the sub-contract for Dr. Alison Bailey titled, *English Language Assessment Development -- WIDA standards*.

The total estimated cost of the award as described in our budget is \$394,000 for the period beginning October 1, 2011 through September 30, 2015. The activities of this project will be conducted under the direction of Dr. Alison Bailey, Principal Investigator.

If you have any questions of a technical nature concerning the proposal, please contact Dr. Alison Bailey at abailey@gseis.ucla.edu or (310) 825-1731.

If you have any questions of an administrative nature for the proposal, please contact Ken Castro-Oistad at (kcastro-oistad@research.ucla.edu) or at 310-794-0191 in UCLA's Office of Contract and Grant Administration. If an award is made, please issue award documents to The Regents of the University of California, and forward the materials to the above address.

Sincerely,

(b)(6)

Kristin Lund
Senior Grant Analyst

Enclosures: Referenced Proposal

cc: Alison Bailey, Principal Investigator
Judy Miyoshi, GSE&IS Contract & Grant Manager



May 17, 2011

Ms. Lynette Russell
Director of Educational Accountability
Wisconsin Department of Public Instruction
125 S. Webster Street
Madison, WI 53707-7841

RE: *Enhanced Assessment Instruments Grants Program*
CFDA Number 84.368

Dear Ms. Russell:

Data Recognition Corporation (DRC) is pleased to extend our sincere commitment to the Wisconsin Department of Public Instruction (DPI), along with the World-class Instructional Design and Assessment Consortium (WIDA), on your proposal in response to the grant program for Enhanced Assessment Instruments. We look forward to delivering our state-of-the-art online assessment system to meet the needs of this project. We will also provide overall management of the test delivery system and customer support for schools and districts administering these assessments. DRC is committed to providing exemplary service in support of this exciting initiative.

DRC is a longtime national leader in the successful development and administration of large-scale statewide assessment programs. We recognize the growing importance of offering online delivery of large-scale student assessments, as well as the need to deliver robust reporting tools and instructional resources to educators as part of a comprehensive and interactive online approach. To meet this increasing need, DRC has developed and launched our innovative **DRC INSIGHT™ Online Learning System**. A truly comprehensive system, DRC INSIGHT incorporates computerized testing and related resources with dynamic reporting and a suite of educator tools. We have securely developed and maintained our system in-house, offering maximum control and flexibility for our clients' programs.

I would be happy to provide additional information regarding DRC's commitment to DPI/WIDA at the Department's request. Our team looks forward to this opportunity.

Sincerely,

Susan S. Engeleiter
Chief Executive Officer and President

13490 Bass Lake Road Maple Grove, Minnesota 55311
800-826-2368 763-268-2000 Fax 763-268-3000



MetriTech, Inc.

May 13, 2011

Ms. Lynette Russell
Director of Educational Accountability
Wisconsin Department of Public Instruction
125 S. Webster Street
Madison, WI 53707-7841

Dear Ms. Russell:

We would like to express our commitment to the Wisconsin Department of Public Instruction for the grant application, "Enhanced Assessment Instruments Grants Program," CFDA Number 84.368.

MetriTech is committed to providing writing and speaking scoring services in support of the program development proposed. MetriTech has more than 28 years of experience working within the education community and is committed and dedicated to continuing our work with our educational partners. We are enthusiastic about partnering with the Wisconsin Department of Public Instruction to work on this grant, as it will allow us to further invest in the educational community.

Sincerely,

(b)(6)

Susan C. Feldman
Vice President of Operations

Budget Narrative

Budget Narrative

Attachment 1:

Title: Pages: Uploaded File: **1237-ASSETS Budget Narrative Final.pdf**

Enhanced Assessment Instruments Grant CFDA Number 84.368

Assessment Services Supporting ELs through Technology Systems (ASSETS)

Total Project Budget Narrative, by Line Item

Wisconsin Department of Public Instruction

Grant funds will be used for the services of the Wisconsin Department of Public Instruction project director, assistant project director, standards based assessment consultant, and consortium grant coordinator positions. As the lead state and fiscal agent for the consortium under this grant, the Wisconsin Department of Public Instruction will grant all remaining federal Enhanced Assessment Grant funds to the WIDA management and research team, which is based at the Wisconsin Center for Education Research at the University of Wisconsin-Madison, to conduct the ASSETS project activities. The Wisconsin Department of Public Instruction will expend funds as follows:

1. Personnel	\$368,528.00
2. Fringe Benefits	\$156,660.00
3. Travel	0
4. Equipment	0
5. Supplies	0
6. Contractual	\$9,791,731.00
7. Construction	0
8. Other	\$96,536.00
9. Total Direct Costs	\$10,413,455.00
10. Indirect Costs	\$72,740.00
11. Training Stipends	0
12. Total Costs	\$10,486,195.00

1. PERSONNEL

All persons who work for the Wisconsin Department of Public Instruction are placed on the payroll in accordance with department policies and procedures. Salaries for professional staff are based on current salaries. Salaries are not projected to increase during the period of the grant.

Lynette Russell: Lynette Russell is the director in the Office of Educational Accountability and has extensive experience in statewide test development, test administration, and integration of assessment efforts with curriculum development and school improvement processes.

Year 1: $\$98,200 \times 10\% = \$9,820$

Year 2: $\$98,200 \times 10\% = \$9,820$

Year 3: $\$98,200 \times 10\% = \$9,820$

Year 4: $\$98,200 \times 10\% = \$9,820$

Philip Olsen: Philip Olsen is the assistant director in the Office of Educational Accountability and supervises the statewide assessment of the ACCESS for ELLs, which is administered to approximately 50,000 students annually.

Year 1: $\$88,150 \times 10\% = \$8,815$

Year 2: $\$88,150 \times 10\% = \$8,815$

Year 3: $\$88,150 \times 10\% = \$8,815$

Year 4: $\$88,150 \times 10\% = \$8,815$

Standards Based Assessment Consultant: The Standards Based Assessment Consultant will play a key role in consulting, coordinating, and communicating with interdepartmental resources, administrators, district staff, educators, and policy makers at the local, state, and national level.

Year 1: $\$56,536 \times 30\% = \$16,960$

Year 2: $\$56,536 \times 30\% = \$16,960$

Year 3: $\$56,536 \times 30\% = \$16,960$

Year 4: $\$56,536 \times 30\% = \$16,960$

Statewide Project Coordinator (to be hired or assigned): The Statewide Project Coordinator will be responsible for reviewing project timelines, coordinating steering committee activities, ensuring products and services meet the states and federal requirements, and assisting in the technical aspects of operationalizing the system.

Year 1: $\$56,536 \times 100\% = \$56,536$

Year 2: $\$56,536 \times 100\% = \$56,536$

Year 3: $\$56,536 \times 100\% = \$56,536$

Year 4: $\$56,536 \times 100\% = \$56,536$

2. FRINGE BENEFITS

Fringe benefit rates vary by employee classification and the base includes salaries.

Classifications and rates are established by the State of Wisconsin. The current fringe benefit rate is 42.51%.

Lynette Russell:

Year 1: $\$9,820 \times 42.51\% = \$4,174$

Year 2: $\$9,820 \times 42.51\% = \$4,174$

Year 3: $\$9,820 \times 42.51\% = \$4,174$

Year 4: $\$9,820 \times 42.51\% = \$4,174$

Phil Olsen:

Year 1: $\$8,815 \times 42.51\% = \$3,747$

Year 2: $\$8,815 \times 42.51\% = \$3,747$

Year 3: $\$8,815 \times 42.51\% = \$3,747$

Year 4: $\$8,815 \times 42.51\% = \$3,747$

Standards Based Assessment Consultant:

Year 1: \$16,960 x 42.51%=\$7,210
Year 2: \$16,960 x 42.51%=\$7,210
Year 3: \$16,960 x 42.51%=\$7,210
Year 4: \$16,960 x 42.51%=\$7,210

Consortium Project Coordinator:

Year 1: \$56,536 x 42.51%=\$24,033
Year 2: \$56,536 x 42.51%=\$24,033
Year 3: \$56,536 x 42.51%=\$24,033
Year 4: \$56,536 x 42.51%=\$24,033

6. CONTRACTUAL

The project management partner will conduct grant activities on behalf of and under the direction of the Wisconsin Department of Public Instruction and participating state education agencies.

WIDA (See “The University of Wisconsin-Madison Budget Narrative” for more detail.) P . 5

Year 1: \$2,209,789
Year 2: \$2,214,598
Year 3: \$3,144,292
Year 4: \$2,223,052

7. OTHER FIXED COSTS

A. Other fixed costs are calculated at 16.1022% of project staff base salary.

Lynette Russell:

Year 1: \$9,820 x 16.1022% = \$1,581
Year 2: \$9,820 x 16.1022% = \$1,581
Year 3: \$9,820 x 16.1022% = \$1,581
Year 4: \$9,820 x 16.1022% = \$1,581

Phil Olsen:

Year 1: \$8,815 x 16.1022%=\$1,419
Year 2: \$8,815 x 16.1022%=\$1,419
Year 3: \$8,815 x 16.1022%=\$1,419
Year 4: \$8,815 x 16.1022%=\$1,419

Standards Based Assessment Consultant:

Year 1: \$16,960 x 16.1022%=\$2,731
Year 2: \$16,960 x 16.1022%=\$2,731
Year 3: \$16,960 x 16.1022%=\$2,731
Year 4: \$16,960 x 16.1022%=\$2,731

Consortium Project Coordinator:

Year 1: $\$56,536 \times 16.1022\% = \$9,103$

Year 2: $\$56,536 \times 16.1022\% = \$9,103$

Year 3: $\$56,536 \times 16.1022\% = \$9,103$

Year 4: $\$56,536 \times 16.1022\% = \$9,103$

B. IT fixed costs are calculated at a rate of \$6,200 for a 1.0 FTE employee.

Lynette Russell:

Year 1: $\$6,200 \times 10\% = \620

Year 2: $\$6,200 \times 10\% = \620

Year 3: $\$6,200 \times 10\% = \620

Year 4: $\$6,200 \times 10\% = \620

Phil Olsen:

Year 1: $\$6,200 \times 10\% = \620

Year 2: $\$6,200 \times 10\% = \620

Year 3: $\$6,200 \times 10\% = \620

Year 4: $\$6,200 \times 10\% = \620

Standards Based Assessment Consultant:

Year 1: $\$6,200 \times 30\% = \$1,860$

Year 2: $\$6,200 \times 30\% = \$1,860$

Year 3: $\$6,200 \times 30\% = \$1,860$

Year 4: $\$6,200 \times 30\% = \$1,860$

Consortium Project Coordinator:

Year 1: $\$6,200 \times 100\% = \$6,200$

Year 2: $\$6,200 \times 100\% = \$6,200$

Year 3: $\$6,200 \times 100\% = \$6,200$

Year 4: $\$6,200 \times 100\% = \$6,200$

10. INDIRECT COSTS

Indirect costs are calculated at 11.7% of the total of project staff salaries, fringe benefits, other fixed costs, and IT fixed costs for a project total of \$18,185.

Year 1: $\$155,431 \times 11.7\% = \$18,185$

Year 2: $\$155,431 \times 11.7\% = \$18,185$

Year 3: $\$155,431 \times 11.7\% = \$18,185$

Year 4: $\$155,431 \times 11.7\% = \$18,185$

12. TOTAL COSTS

Year 1: \$2,383, 405

Year 2: \$2,388,214

Year 3: \$3,317,908

Year 4: \$2,396,668

Assessment Services Supporting ELs through Technology Systems (ASSETS)

The University of Wisconsin - Madison BUDGET NARRATIVE

1. PERSONNEL

All persons who work regularly for the Center are placed on the University of Wisconsin payroll in accordance with established University procedures. Titles and stipends are regulated and approved by Center management, the Dean of the School of Education, Madison Campus and University Central Administration. Salaries for professional staff are based on current salaries. Merit increments are calculated each year at 3% effective July 1 for professional staff.

Tim Boals, PI: Tim Boals is the executive director of the WIDA Consortium and has extensive experience in ELL research, specifically in curriculum and instruction with a focus on academic language. He is responsible for leadership, strategic planning, operations, and board relations.

Year 1 – \$116,619 X 10% time = \$11,662

Year 2 – \$120,118 X 10% time = \$12,012

Year 3 – \$122,722 X 10% time = \$12,272

Year 4 – \$126,404 X 10% time = \$12,640

Elizabeth Cranley, Co-PI: Elizabeth Cranley is the associate director of the WIDA Consortium and directs the development and implementation of the ACCESS for ELLs, which is administered to approximately 1 million students annually. She will direct test development from WCER.

Year 1 – \$103,795 X 10% time = \$10,380

Year 2 – \$106,909 X 10% time = \$10,691

Year 3 – \$110,116 X 10% time = \$11,012

Year 4 – \$113,419 X 10% time = \$11,342

Carsten Wilmes, Assistant Director of Assessment: Carsten Wilmes, who, with a background in language testing, manages all WIDA operational assessments and assessments-in-development and is the primary liaison with the CAL office. He will continue that role through this grant

Year 1 – \$75,491 X 25% time = \$18,873

Year 2 – \$77,756 X 25% time = \$19,439

Year 3 – \$80,089 X 25% time = \$20,002

Year 4 – \$82,492 X 25% time = \$20,623

H. Gary Cook, Research Scientist: H. Gary Cook is the Research Director for the WIDA Consortium. His recent research interests have focused on assessment alignment as well as applying value-added modeling techniques in urban settings to address key educational questions. Dr. Cook will direct non-psychometric research for ASSETS.

Year 1 – \$94,358 X 5% time = \$4,718

Year 2 – \$97,189 X 5% time = \$4,859

Year 3 – \$100,105 X 5% time = \$5,005

Year 4 – \$103,108 X 5% time = \$5,155

Mariana Castro, PD Director: Ms. Castro is the WIDA Consortium Professional Development Director. Ms. Castro has supervised the development, implementation and evaluation of the WIDA professional development program offerings, which include workshops, summer academies, certification programs and web-based tutorials. She will direct the research and design of the professional development program.

Year 1 – \$82,177 X 5% time = \$4,109

Year 2 – \$84,642 X 5% time = \$4,232

Year 3 – \$87,181 X 5% time = \$4,359

Year 4 – \$89,796 X 5% time = \$4,490

Melissa Paton, PD Outreach Specialist: Melissa Paton has fifteen years of teaching experience devoted to working solely with students with diverse linguistic backgrounds and to helping all teachers build their capacity for developing students' language acquisition. Ms. Paton will be responsible for the development and delivery of the research-based professional development and teacher resource development offerings accompany the assessments.

Year 1 – \$0

Year 2 – \$63,860 X 10% time = \$6,386

Year 3 – \$65,776 X 20% time = \$13,155

Year 4 – \$67,749 X 20% time = \$13,550

WIDA ASSETS project manager (to be hired or assigned): The project manager will have extensive experience in management of large, complex projects. The manager will direct the goals and deliverables of the grant at WCER, including compliance with requirements for research with human subjects, contract administration, report preparation, and dissemination. This person will also serve as the primary liaison with the consortium member states and oversee the organizational and logistical aspects of the project

Year 1 – \$75,000 X 100% time = \$75,000

Year 2 – \$77,250 X 100% time = \$77,250

Year 3 – \$79,568 X 100% time = \$79,568

Year 4 – \$81,955 X 100% time = \$81,955

WIDA ASSETS assessment project coordinator (to be hired or assigned): The assessment project coordinator will have experience in professional development, test administration, and project coordination. This individual will oversee the day-to-day operations of the ASSETS test development process and help coordinate research and development of curriculum and technology-based training materials.

Year 1 – \$50,000 X 100% time = \$50,000

Year 2 – \$51,500 X 100% time = \$51,500

Year 3 – \$53,045 X 100% time = \$53,045

Year 4 – \$54,636 X 100% time = \$54,636

Total Personnel

Year 1 - \$174,742

Year 2 - \$186,369

Year 3 - \$198,438

Year 4 - \$204,391

2. FRINGE BENEFITS

Fringe benefit rates vary by employee classification. Classifications are established by the University. In recent years, fringe benefit rates have increased consistently on an annual basis and are increased slightly each year.

Tim Boals:

Year 1: $\$11,662 \times 44\% = \$5,131$
Year 2: $\$12,012 \times 44.5\% = \$5,345$
Year 3: $\$12,272 \times 45\% = \$5,522$
Year 4: $\$12,640 \times 45.5\% = \$5,751$

Elizabeth Cranley:

Year 1: $\$10,380 \times 44\% = \$4,567$
Year 2: $\$10,691 \times 44.5\% = \$4,757$
Year 3: $\$11,012 \times 45\% = \$4,955$
Year 4: $\$11,342 \times 45.5\% = \$5,161$

Carsten Wilmes:

Year 1: $\$18,873 \times 44\% = \$8,304$
Year 2: $\$19,439 \times 44.5\% = \$8,650$
Year 3: $\$20,022 \times 45\% = \$9,010$
Year 4: $\$20,623 \times 45.5\% = \$9,383$

H. Gary Cook:

Year 1: $\$4,718 \times 44\% = \$2,076$
Year 2: $\$4,859 \times 44.5\% = \$2,162$
Year 3: $\$5,005 \times 45\% = \$2,252$
Year 4: $\$5,155 \times 45.5\% = \$2,346$

Mariana Castro:

Year 1: $\$4,109 \times 44\% = \$1,808$
Year 2: $\$4,232 \times 44.5\% = \$1,883$
Year 3: $\$4,359 \times 45\% = \$1,962$
Year 4: $\$4,490 \times 45.5\% = \$2,043$

Melissa Paton:

Year 1: \$0
Year 2: $\$6,386 \times 44.5\% = \$2,842$
Year 3: $\$13,155 \times 45\% = \$5,920$
Year 4: $\$13,550 \times 45.5\% = \$6,165$

Project Manager:

Year 1: $\$75,000 \times 44\% = \$33,000$
Year 2: $\$77,250 \times 44.5\% = \$34,376$
Year 3: $\$79,568 \times 45\% = \$35,806$
Year 4: $\$81,955 \times 45.5\% = \$37,290$

Project Coordinator:

Year 1: \$50,000 x 44% = \$22,000

Year 2: \$51,500 x 44.5% = \$22,918

Year 3: \$53,045 x 45% = \$23,870

Year 4: \$54,636 x 45.5% = \$24,859

3. TRAVEL

All reimbursements for transportation, lodging, meals, and related costs are included in this category. Travel expense reimbursements are made on the basis of actual and reasonable expenditures. Payments are governed by Wisconsin State Statutes and the University of Wisconsin System Travel Regulations. Travel estimates are based on past Center accounting experience, allowable travel expenses based on the University and State of Wisconsin travel regulations and travel quotes from Madison travel agencies. An inflation rate of 4% is built into each succeeding year.

Purpose of Travel	# People Traveling	\$ per Person for Trip	Total
Advisory Board Mtgs: Two mtgs per year Y1&Y2 (14 trips, 2 overnites each year); one mtg per year Y3&Y4 (7 trips, 2 overnites each year).	7	Yr. 1 - \$1,232; Yr. 2 - \$1,283; Yr. 3 - \$1,332; Yr. 4 - \$1,386	\$59,368
Forms Review Mtgs: 3 types of review (Content & Bias, Item and Forms) held annually Y1-Y4 (52 total trips, 2 overnites each year)	52	Yr. 1 - \$1,232; Yr. 2 - \$1,283; Yr. 3 - \$1,332; Yr. 4 - \$1,386	\$272,116
Annual Board Mtg: held annually Y1-Y4. Participants will include all key personnel and SEA members. (25 trips, 2 overnites each year)	25	Yr. 1 - \$1,232; Yr. 2 - \$1,283; Yr. 3 - \$1,332; Yr. 4 - \$1,386	\$130,825
Subcommittee Mtgs: held semi-annually Y1 (20 trips, 2 overnites); annually Y2-Y4 (10 trips, 2 overnites each year). Participants will include SEAs, Advisory Board Members and key personnel.	10	Yr. 1 - \$1,032; Yr. 2 - \$1,283; Yr. 3 - \$1,332; Yr. 4 - \$1,386	\$60,650
Trips to CAL and DRC to meet with development staff. Meet once per month Y1-Y4. (24 trips, 2 overnites each year)	2	Yr. 1 - \$1,032; Yr. 2 - \$1,283; Yr. 3 - \$1,332; Yr. 4 - \$1,386	\$120,792
Trips to attend national conferences relevant to assessment, research and EL educational issues. Two conferences per year with two participants attending in Y1-Y4 (4 trips, 4 overnites each year)	2	Yr. 1 - \$2,212; Yr. 2 - \$2,283; Yr. 3 - \$2,230; Yr. 4 - \$2,426	\$37,084
Standards Setting Meeting in Y4. Participants will include SEA members and project key personnel. (80 trips, 2 overnites)	80	Yr. 4 - \$1,386	\$110,880

4. SUPPLIES

Research Materials: Funds has been budgeted for miscellaneous research materials each year (Yr. 1 - \$4,500; Yr. 2 - \$3,000; Yrs. 3-4 \$2,000).

Computers: Two computers and replacements/upgrades have been budgeted to be used by project personnel (Yr. 1 - \$2,500; Yr. 2 - \$2,000).

5. CONTRACTUAL

Center for Applied Linguistics (CAL) (See “CAL Budget Narrative” for more detail) P . 11

Year 1 - \$1,246,147

Year 2 - \$1,192,601

Year 3 - \$1,332,480

Year 4 - \$811,962

Data Recognition Corporation (DRC) (See “DRC Budget Narrative” for more detail) P . 26

Year 1 - \$0

Year 2 - \$0

Year 3 - \$799,998

Year 4 - \$0

MetriTech, Inc. (See “MetriTech Budget Narrative” for more detail) P . 29

Year 1 - \$0

Year 2 - \$0

Year 3 - \$0

Year 4 - \$159,968

University of California – Los Angeles (See “University of California – Los Angeles Budget Narrative” for more detail) P . 30

Year 1 - \$111,543

Year 2 - \$116,547

Year 3 - \$81,360

Year 4 - \$84,550

WestEd (See “WestEd Budget Narrative” for more detail) P . 33

Year 1 - \$116,963

Year 2 - \$172,150

Year 3 - \$173,439

Year 4 - \$218,107

8. Other

Advisory Board will meet face-to-face semi-annually Y1 & Y2 and annually for Y3-Y4 and the meetings will be attended by key project staff. Stipend for board members’ time for meetings and research of 4.5 days per year.

Years 1- \$5,400 x 7 board members = \$37,800

Years 2- \$5,400 x 7 board members = \$37,800

Years 3- \$5,400 x 7 board members = \$37,800

Years 4- \$5,400 x 7 board members = \$37,800

Copying Services – Funds have been budgeted in each year to cover the cost of copying and mail services.

Year 1 - \$500

Year 2 - \$500

Year 3 - \$500

Year 4 - \$500

10. INDIRECT COSTS

Modified Total Direct Costs (MTDC) is used as the base for overhead calculations. The MTDC base includes all direct charges except that portion of a subcontract in excess of \$25,000. The University negotiates with DH&HS Region 5 to establish indirect cost rates. The 50.5% rate used in this proposal is the approved rate effective July 1, 2011.

12. TOTAL COSTS

Year 1 - \$2,209,789

Year 2 - \$2,214,598

Year 3 - \$3,144,292

Year 4 - \$2,223,052

4-Year Total - \$9,791,731

Center for Applied Linguistics

Line Item Budget Justification

Assessment Services Supporting ELs through Technology Systems (ASSETS)

The proposed budget covers expenses involved in the development, piloting, field testing and finalizing of ELP technology-based assessments, which allow for authentic language assessment tasks, including performance based tasks for all domains. The assessments to be developed include a technology-based summative test for grades K-12; a technology based on demand-diagnostic screener test and a series of technology based classroom benchmark assessments by language domain and by standards. Additionally, CAL will create, pilot and field test an adaptation of CAL's Multimedia Rater Training Program to provide intensive on-demand training and practice in scoring, speaking and writing.

1. Senior Personnel

Dr. Dorry Kenyon will be the Project Director for ASSETS at CAL. He will provide leadership and guidance to the project teams. This project builds on the current WIDA ACCESS for ELLs[®] project and will require the expertise and assistance of the ACCESS Management Team. The team is comprised of the Project Director (Dr. Dorry Kenyon), the Project Manager for Test Development (Jennifer Christenson), the Project Manager for Psychometrics/Research (Dr. David MacGregor), and the Project Manager for Operations (Anna Todorova). The members of this team will work to provide liaison with the whole ACCESS project at no cost to this grant.

Dr. Meg Malone will be the Senior Project Advisor and lead the team revising the speaking domain (*Task 1: Grades 1-12 Speaking (Paper and Computer)*). Dr Malone will be involved at 0.22 of a full-time equivalent (FTE) for the four years of the project. Though Jennifer Christenson will be the Project Manager for the subaward and will oversee the implementation of the project and its alignment to current WIDA ACCESS for ELLs[®], the day-to-day management of the proposed project will be carried out by a Test Development Project Coordinator (TBN) with an involvement of 0.92 throughout the project. The Test Development Project Coordinator will lead a team of Language Testing Specialists directly involved in the transitioning of current paper tasks to computer (*Task 2: Grades 1-12 LRW (Computer) and Task 3: Screener Grades 1-12*). The Test Development Project Coordinator will be responsible for coordinating the day-to-day activities, participating in the development of test specifications and test tasks, the conduct of the cognitive labs, the training of the field testers, the collection and analyses of qualitative data during the field test, and the preparation of all final materials for the project.

Cathy Cameroon will be the Project Manager for (Benchmark) Operations. In this capacity she will manage the operations for development of benchmark assessments and will oversee the

research activities (*Task 4: Benchmarks (Response and Scoring)*). She will devote 0.62 FTE in Year 1; 0.55 FTE in Year 2; 0.55 FTE in Year 3 and 0.10 FTE in Year 4 of the project. The content work of the benchmark team will be guided by David Gabel, Project Manager for (Benchmark) Content. He will manage the development of response tasks for benchmark assessments and will devote 0.77 FTE in Year 1; 0.55 FTE in Year 2; 0.55 FTE in Year 3 and 0.10 FTE in Year 4 of the project.

Other Personnel

The Language Testing Specialist - Speaking, Francesca Di Silvio, will be involved in the revision of the speaking tasks and the piloting of new speaking items. She will devote 0.92 FTE during the four years of the project. To accomplish computerization of the summative test, upgrade and computerization of the screener assessment, CAL will hire additional staff to pair up with the team already working on the paper assessment for WIDA ACCESS for ELLs[®]. The following positions will need to be staffed: A Language Testing Specialist - Speaking (TBN) will be required to conduct the review of speaking items and to help with operationalization of the speaking test. This staff member will be tasked at 0.92 FTE throughout the project. The Language Testing Specialist - Reading (TBN) will work closely with the reading champion for WIDA ACCESS for ELLs[®] items to assist with the computerization of the reading domain. The involvement of the Language Testing Specialist - Reading will be 0.92 FTE in Year 1 of the project. Transitioning the writing items to a computer format will require the efforts of Anne Donovan, a Language Testing Specialist - Writing at 0.92 FTE in Year 1 of the project.

Katharine Merow, Item Development Specialist (Benchmarks), will work on the development of response tasks for benchmark assessments. She will be tasked at 0.77 FTE in Year 1; 0.55 FTE in Year 2; 0.55 FTE in Year 3 and 0.10 FTE in Year 4. Lead Media Graphics Specialist, Alex Simmons, will work to incorporate the interactive response elements into the prototypes for benchmark assessment. He will be involved at 0.38 FTE in Year 1; 0.46 FTE in Year 2 and Year 3 and at 0.10 FTE in Year 4. The Media Graphics Specialist Rafael Michelena will work to create media graphics and images for the benchmark assessment. He will be involved at 0.38 FTE in Year 1; 0.46 FTE in Year 2 and Year 3 and at 0.10 FTE in Year 4. The Lead Programmer Jorge Murillo will work to establish the templates for functionality and interaction of the benchmark assessments. He will be involved at 0.62 FTE in Year 1; 0.55 FTE in Year 2 and 3 and at 0.10 FTE in Year 4. In addition to this team, the Programmer Linda Huang will help train partner institutions to create interactive items. She will be involved at 0.62 FTE in Year 1; 0.55 FTE in Year 2 and 3 and at 0.10 FTE in Year 4.

The Administrator Training Coordinator Tatyana Vdovina will be involved in the creation of test administration and ancillary training materials for the computerized test. She will be tasked at 0.8 FTE in Year 3 and Year 4.

Although David MacGregor will provide leadership to the Psychometrics/Research team, the data management and analytic work for the project will be conducted by Shu Jing Yen, Senior Psychometrician. She will devote 0.05 FTE in Year 1; 0.15 FTE in Year 2; 0.20 FTE in Year 3 and 0.15 FTE in Year 4. The Data Analyst (TBN) will be involved at 0.25 FTE in Year 2, 0.92 FTE in Year 3 and 0.50 FTE in Year 4. Additionally, a Research Assistant II -Psychometrics (TBN) will be needed at 0.50 FTE in Year 2, Year 3 and Year 4. The volume of psychometric analysis will require the efforts of a Research Assistant I - Psychometrics (TBN) at 0.50 FTE in Year 2, Year 3 and Year 4.

The project will benefit from the management capacity and budget monitoring experience of Anna Todorova, Project Manager for Operations, who has experience with WIDA ACCESS for ELLs[®].

2. Fringe Benefits

CAL's provisional fringe benefits rate is 39.68%. This rate is based on CAL's indirect cost rate agreement issued by the U.S. Department of Education Indirect Cost Group. Fringe benefits include vacation, sick and holiday leave expense, medical, life and disability insurance, retirement, and mandatory payroll tax expenses.

3. Travel

Employee Travel

The major expense for travel reflects the need for CAL staff to participate in project management and advisory board meetings, as well as travel for cog labs and observation of field testing.

Year 1:

Task 1: Grades 1-12 Speaking (Paper and Computer)

One staff member will take 2 three-day trips to attend Advisory Committee meetings.

Three staff members will each take 3 three-day trips requiring air travel to conduct cog labs for speaking items.

Task 2: Grades 1-12 LRW (Computer)

Six staff members will each take 1 two-day trip to attend Advisory Committee meetings.

Task 4: Benchmarks (Response and Scoring)

Two staff members will each take 2 two-day trips to attend Advisory Committee meetings.

Four staff members will each take 1 five-day trip requiring air travel to conduct cog labs for benchmark items.

Year 2:

Task 1: Grades 1-12 Speaking (Paper and Computer)

One staff will take 1 two-day trip to attend Advisory Committee meeting.

Three staff members will each take 3 three-day trips requiring air travel to conduct cog labs for speaking items.

Task 2: Grades 1-12 LRW (Computer)

Six staff members will each take 1 three-day trip to attend Bias and Content review.

Eight staff members will each take 1 five-day trip requiring air travel to conduct cog labs for listening, reading and writing items.

Task 4: Benchmarks (Response and Scoring)

Four staff members will each take 2 five-day trips requiring air travel to conduct cog labs for benchmark items.

One staff member will take 1 two-day trip to attend Advisory Committee meeting.

Year 3:

Task 1: Grades 1-12 Speaking (Paper and Computer)

One staff member will take 1 two-day trip to attend Advisory Committee meeting.

Three staff members will each take 3 four-day trips requiring air travel to conduct field testing for speaking items.

Task 2: Grades 1-12 LRW (Computer)

Six staff members will each take 1 three-day trip requiring air travel to observe field testing of listening, reading and writing items.

Three staff members will each take 1 two-day trip to attend Advisory Committee meetings.

Task 4: Benchmarks (Response and Scoring)

Two staff members will each take 2 three-day trips to attend Advisory Committee meetings.

Five staff members will each take 2 three-day trip requiring air travels to do field testing of benchmark items.

Year 4:

Task 1: Grades 1-12 Speaking (Paper and Computer)

One staff member will take 1 two-day trip to attend Advisory Committee meeting.

Task 2: Grades 1-12 LRW (Computer)

Four staff members will each take 1 two-day trip requiring air travel to observe field testing of listening, reading and writing items.

Task 4: Benchmarks (Response and Scoring)

Two staff members will each take 2 three-day trips requiring air travels to do field testing of benchmark items.

Overall, employee travel expenses are estimated at \$28,350 in Year 1; \$43,950 in Year 2; \$38,950 in Year 3 and \$9,350 in Year 4. Total costs for employee travel over the four years of the project are \$120,600.

Consultant Travel

CAL will contract with consultants to review the speaking test specifications, to analyze the results from piloting and to assist with the conduct of the cog labs and field test reviews.

Year 1:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will travel to CAL for a 3-day review of tasks specifications for Speaking.

Task 4: Benchmarks (Response and Scoring)

Four consultants will travel to state schools to conduct cog labs for the innovative benchmark assessment items.

Year 2:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will travel to CAL for a 3-day pilot review of the new Speaking items.

Task 4: Benchmarks (Response and Scoring)

Four consultants will travel to state schools to conduct cog labs for the innovative benchmark assessment items.

Year 3:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will travel to CAL for a 3-day field test review of the new Speaking items..

Additionally, 4 consultants will travel to CAL for a 3-day final review of the Speaking test items. Four members of the advisory board will participate in this review. They will contribute their time without compensation and will only be compensated for travel expenses.

Year 4:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will travel to CAL for a 3-day data review of the new Speaking items.

Overall costs for consultant travel are budgeted at 14,600 in Year1; \$23,800 in Year 2; 18,400 in Year 3 and \$9,200in year 4. The total cost for consultant travel over the four years of the project is \$66,000.

5. Supplies

A total of \$700 for each project year is budgeted for supplies to conduct reviews, prepare printed material and maintain project activities.

8. Other Direct Costs

Facility Costs

CAL uses the direct allocation method to distribute facility costs on the basis of actual program staffing requirements. Facility costs include rent, utilities, depreciation of furniture and equipment, property & casualty and workers compensation insurance, and building operation and maintenance costs.

Consultants

CAL will contract with the following consultants to carry out the tasks on this project:

Year 1:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will assist with the review of tasks specifications for Speaking. They will each work for 8 days and will be compensated at a daily rate of \$160.

Task 2: Grades 1-12 LRW (Computer)

Four consultants will be needed to provide guidance and coordination for participants in the Item Writing Course for new items. They will be paid a fixed rate of \$4,500 each.

Eight consultants will be involved as paid Item Writers to provide raw items for the test. They will each complete 5 folders and will be compensated \$100 per folder.

Thirty-six consultants (3 per grade level) will provide expertise as Standards Experts reviewing the test items. They will be compensated at a fixed rate of \$160 each.

Task 3: Screener Grades 1-12

Six Standards Experts will review test items for the update of the Screener. They will be compensated at a rate of \$160 each.

Five artists will create the images for the new updated Screener. They will each be paid \$1,000.

Task 4: Benchmarks (Response and Scoring)

Four consultants will conduct cog labs for the innovative benchmark assessment items. They will work for 4 days and will be compensated at a daily rate of \$160.

Year 2:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will assist with the pilot review of the new Speaking items. They will each work for 6 days and will be compensated at a daily rate of \$160.

Task 2: Grades 1-12 LRW (Computer)

CAL will contract with 36 consultants to conduct field tryouts for the new computerized items. They will be compensated at a flat rate of \$200 each.

Task 3: Screener Grades 1-12

Five artists will create the images for the new the updated Screener. They will each be paid \$1,000.

Task 4: Benchmarks (Response and Scoring)

Four consultants will conduct cog labs for the innovative benchmark assessment items. They will work for 4 days and will be compensated at a daily rate of \$160.

Year 3:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will assist with the Field Test review of the new Speaking items. They will each work for 4 days and will be compensated at a daily rate of \$160.

Additionally, 4 consultants will attend a 3-day workshop at CAL to conduct a final review of the speaking test items. They will be compensated for 4 days of work (3 during the workshop and one additional day of preparation) at a daily rate of \$160.

Four members of the advisory board will participate in this review. They will contribute their time without compensation and will only receive reimbursement for travel expenses.

Year 4:

Task 1: Grades 1-12 Speaking (Paper and Computer)

Eight consultants will assist with the data review of the new Speaking items. They will each work for 6 days and will be compensated at a daily rate of \$160.

Additionally, CAL will need consultants for Bias and Content Panel review in Year 1. CAL's budget does not include costs for consultants participating in B & C review, since the expenses will be covered by WIDA.

Similarly, in the second year, consultants will be needed for the Standards Setting Review. CAL's budget does not include costs for consultants participating in the Standards Setting Review, since the expenses will be covered by WIDA.

Overall consultant costs associated with carrying out project activities are \$46,520 in Year 1; \$22,440 in Year 2; \$7,680 in Year 3 and \$7,680 in Year 4. Total costs for consultants over the course of the project are \$84,320.

Communications

\$1,000 for each year of the project is budgeted for WEBEX conference calls related to cog labs preparation, the Bias and Content Review and Standards Experts Review.

Duplication and Printing

\$1,000 for each year of the project is budgeted for duplication and printing costs. This includes duplication of draft test materials for internal and external reviews, production and final proofing, as well as printing of field tryout test materials.

School Incentives

\$4,000 will be provided to schools participating in the cog labs to test the innovative benchmark assessment in Year 1. The budget assumes that 16 schools will be given a \$250 incentive each. Similarly, in Year 2, \$2,000 will be given to 8 schools (\$250 per school) for participation in the cog labs for benchmark assessment.

Postage/Courier

\$1,450 for each project year is budgeted for postage and delivery services to ship test materials to tryout consultants, bias and sensitivity reviewers, and standards experts.

10. Indirect Costs

CAL's provisional overhead rate is 26.71%. The rate is based on CAL's indirect cost rate agreement issued by the U.S. Department of Education Indirect Cost Group. The rate is applied to total direct costs excluding equipment and subcontract costs in excess of \$25,000 per subcontract per project year.

12. Amount of this Request

The amount requested for CAL's portion of this project is \$1,246,147 in Year 1; \$1,192,601 in Year 2; 1,332,480 in Year 3 and \$811,962 in Year 4. The total requested amount for the four years of the project is \$4,583,190.

Project Title: Assessment Services Supporting ELs through Technology Systems (ASSETS)
 Proposal Submitted by: Center for Applied Linguistics
 Performance Period: 10/1/11-9/30/15
 Date: May 20, 2011
 Funder: U.S. Department of Education (Subaward from University of Wisconsin)

Line Item		YEAR 1	YEAR 2	YEAR 3	YEAR 4	TOTAL
CAL Direct Labor						
Project Director	Dorry Kenyon	-	-	-	-	-
Senior Project Advisor	Meg Malone	26,494	27,079	28,162	29,289	111,025
Project Manager Test Development	Jennifer Christenson	-	-	-	-	-
TD Project Coordinator - RA IV	TBN	55,385	57,600	59,904	62,300	235,190
Language Testing Specialist -Speaking RA II	Francesca Di Silvio	55,968	58,207	60,535	62,956	237,666
Language Testing Specialist - Speaking RA II	TBN	46,154	48,001	49,921	51,917	195,993
Language Testing Specialist-Reading RA II	TBN	46,154	-	-	-	46,154
Language Testing Specialist -Writing RA II	Anne Donovan	41,129	-	-	-	41,129
Project Manager (Benchmarks) Operations	Cathy Cameroon	49,280	45,485	47,305	8,661	150,732
Project Manager (Benchmarks) Content	David Gabel	59,200	43,713	45,462	8,324	156,699
Item Development Specialist (Benchmarks)	Katharine Merow	39,426	29,112	30,277	5,544	104,358
Lead Media Graphics Specialist	Alex Simmons	24,585	30,682	31,909	6,914	94,090
Media Graphics Specialist	Rafael Michelena	20,014	24,977	25,977	5,628	76,596
Lead Programmer	Jorge Murillo	38,454	35,493	36,913	6,759	117,620
Programmer	Linda Huang	27,693	25,560	26,583	4,867	84,703
Administrator Training Coordinator	Tatyana Vdovina	-	-	4,499	4,679	9,179
Project Manager Psychometrics/ Research	David MacGregor	-	-	-	-	-
Senior Psychometrician	Shu Jing Yen	5,304	17,468	24,859	18,893	66,525
Data Analyst	TBN	-	18,744	70,887	39,933	129,565
Research Assistant II Psychometrics	TBN	-	27,516	28,617	29,761	85,894
Research Assistant I Psychometrics	TBN	-	21,321	22,174	23,061	66,556
Project Manager Operations	Anna Todorova	-	-	-	-	-
Subtotal Direct Labor		535,241	510,960	593,984	369,488	2,009,673
Fringe Benefits	39.68%	212,386	202,751	235,695	146,615	797,447
Total CAL Personnel Costs		747,627	713,711	829,679	516,103	2,807,120
Other Direct Costs						
Facilities Cost Allocation		139,163	132,850	154,436	96,067	522,516
Employee Travel		28,350	43,950	38,950	9,350	120,600
Consultant Travel		14,600	23,800	18,400	9,200	66,000
Consultants		46,520	22,440	7,680	7,680	84,320
Communications		750	650	600	550	2,550
Duplication and Printing		1,000	550	600	600	2,750
School Incentives		4,000	2,000	-	-	6,000
Supplies		600	400	400	400	1,800
Postage/Courier		850	850	850	850	3,400
Subtotal ODCs		235,835	227,492	221,918	124,699	809,944
Total Direct Costs		983,462	941,203	1,051,597	640,802	3,617,064
Overhead - (Applied to Total Direct Costs)	26.71%	262,685	251,398	280,883	171,160	966,126
Total Costs		1,246,147	1,192,601	1,332,480	811,962	4,583,190

Project Title: Assessment Services Supporting ELs through Technology Systems (ASSETS)
 Proposal Submitted by: Center for Applied Linguistics
 Performance Period: 10/1/11-9/30/12
 Date: May 20, 2011

YEAR 1 BUDGET

Funder: U.S. Department of Education (Subaward from University of Wisconsin)

SUMMATIVE ASSESSMENT			SCREENER			BENCHMARKS					
Grades 1-12 Speaking (Paper and Computer)		Grades 1-12 LRW (Paper and Computer)	Grades 1-12 (Paper to Computer)		Response/Scoring Feedback						
TASK 1:			TASK 2:			TASK 3:			TASK 4:		

Line Item	TASK 1:			TASK 2:			TASK 3:			TASK 4:			TOTAL YEAR 1			
	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Total Cost	
CAL Direct Labor																
Project Director				Dorry Kenyon	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Senior Project Advisor				Meg Malone	0.22	58	26,494	0.00	0	-	0.00	0	-	0.00	0	-
Project Manager Test Development				Jennifer Christenson	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
TD Project Coordinator - RA IV				TBN	0.00	0	-	0.62	160	36,923	0.31	80	18,462	0.00	0	-
Language Testing Specialist -Speaking RA II				Francesca Di Silvio	0.92	240	55,968	0.00	0	-	0.00	0	-	0.92	240	55,968
Language Testing Specialist - Speaking RA II				TBN	0.77	200	38,462	0.00	0	-	0.15	40	7,692	0.00	0	-
Language Testing Specialist-Reading RA II				TBN	0.00	0	-	0.62	160	30,770	0.31	80	15,385	0.00	0	-
Language Testing Specialist -Writing RA II				Anne Donovan	0.00	0	-	0.62	160	27,419	0.31	80	13,710	0.00	0	-
Project Manager (Benchmarks) Operations				Cathy Cameroon	0.00	0	-	0.00	0	-	0.00	0	-	0.62	160	49,280
Project Manager (Benchmarks) Content				David Gabel	0.00	0	-	0.00	0	-	0.00	0	-	0.77	200	59,200
Item Development Specialist (Benchmarks)				Katharine Merow	0.00	0	-	0.00	0	-	0.00	0	-	0.77	200	39,426
Lead Media Graphics Specialist				Alex Simmons	0.00	0	-	0.00	0	-	0.00	0	-	0.38	100	24,585
Media Graphics Specialist				Rafael Michelena	0.00	0	-	0.00	0	-	0.00	0	-	0.38	100	20,014
Lead Programmer				Jorge Murillo	0.00	0	-	0.00	0	-	0.00	0	-	0.62	160	38,454
Programmer				Linda Huang	0.00	0	-	0.00	0	-	0.00	0	-	0.62	160	27,693
Administrator Training Coordinator				Tatyana Vdovina	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Project Manager Psychometrics/ Research				David MacGregor	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Senior Psychometrician				Shu Jing Yen	0.00	0	-	0.05	12	5,304	0.00	0	-	0.00	0	-
Data Analyst				TBN	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Research Assistant II Psychometrics				TBN	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Research Assistant I Psychometrics				TBN	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Project Manager Operations				Anna Todorova	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Subtotal Direct Labor							120,924						100,416			55,248
																258,652
																535,241
Fringe Benefits				39.68%			47,983						39,846			21,923
																102,634
																212,386
Total CAL Personnel Costs							168,907						140,262			77,171
																361,286
																747,627
Other Direct Costs																
Facility Cost Allocation							31,441						26,109			14,365
Employee Travel							12,650						5,700			-
Consultants Travel							9,200						-			-
Consultants							10,240						27,760			5,960
Communications							250						250			-
Duplication and Printing							250						250			250
School Incentives							-						-			-
Supplies							150						150			150
Postage/Courier							200						250			200
Subtotal ODC's							64,381						60,469			20,925
																90,060
																235,835
Total Direct Costs							233,288						200,731			98,096
																451,346
																983,462
Overhead - (Applied to Total Direct Costs)							26.71%						62,312			53,616
																26,202
																120,555
																262,685
Total Costs							<u>295,600</u>						<u>254,347</u>			<u>124,298</u>
																<u>571,901</u>
																<u>1,246,147</u>

Project Title: Assessment Services Supporting ELs through Technology Systems (ASSETS)
 Proposal Submitted by: Center for Applied Linguistics
 Performance Period: 10/1/11-9/30/12
 Date: May 20, 2011
 Funder: U.S. Department of Education (Subaward from University of Wisconsin)

YEAR 2 BUDGET

SUMMATIVE ASSESSMENT				SCREENER				BENCHMARKS			
Grades 1-12 Speaking		Grades 1-12 LRW				Response/Scoring					
TASK 1:	TASK 2:	TASK 3:	TASK 4:								

Line Item	TOTAL YEAR 2															
	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	
CAL Direct Labor																
Project Director	Dorry Kenyon	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Senior Project Advisor	Meg Malone	0.22	57	27,079	0.00	0	-	0.00	0	-	0.00	0	-	0.22	57	27,079
Project Manager Test Development	Jennifer Christenson	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
TD Project Coordinator - RA IV	TBN	0.08	20	4,800	0.46	120	28,800	0.38	100	24,000	0.00	0	-	0.92	240	57,600
Language Testing Specialist -Speaking RA II	Francesca Di Silvio	0.92	240	58,207	0.00	0	-	0.00	0	-	0.00	0	-	0.92	240	58,207
Language Testing Specialist - Speaking RA II	TBN	0.92	240	48,001	0.00	0	-	0.00	0	-	0.00	0	-	0.92	240	48,001
Language Testing Specialist-Reading RA II	TBN	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Language Testing Specialist -Writing RA II	Anne Donovan	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Project Manager (Benchmarks) Operations	Cathy Cameroon	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	45,485	0.55	142	45,485
Project Manager (Benchmarks) Content	David Gabel	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	43,713	0.55	142	43,713
Item Development Specialist (Benchmarks)	Katharine Merow	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	29,112	0.55	142	29,112
Lead Media Graphics Specialist	Alex Simmons	0.00	0	-	0.00	0	-	0.00	0	-	0.46	120	30,682	0.46	120	30,682
Media Graphics Specialist	Rafael Michelena	0.00	0	-	0.00	0	-	0.00	0	-	0.46	120	24,977	0.46	120	24,977
Lead Programmer	Jorge Murillo	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	35,493	0.55	142	35,493
Programmer	Linda Huang	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	25,560	0.55	142	25,560
Administrator Training Coordinator	Tatyana Vdovina	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Project Manager Psychometrics/ Research	David MacGregor	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Senior Psychometrician	Shu Jing Yen	0.00	0	-	0.15	38	17,468	0.00	0	-	0.00	0	-	0.15	38	17,468
Data Analyst	TBN	0.00	0	-	0.25	66	18,744	0.00	0	-	0.00	0	-	0.25	66	18,744
Research Assistant II Psychometrics	TBN	0.00	0	-	0.50	130	27,516	0.00	0	-	0.00	0	-	0.50	130	27,516
Research Assistant I Psychometrics	TBN	0.00	0	-	0.50	130	21,321	0.00	0	-	0.00	0	-	0.50	130	21,321
Project Manager Operations	Anna Todorova	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Subtotal Direct Labor				138,086			113,849			24,000			235,024			510,960
Fringe Benefits	39.68%			54,793			45,176			9,524			93,258			202,751
Total CAL Personnel Costs				192,879			159,025			33,524			328,282			713,711
Other Direct Costs																
Facility Cost Allocation				35,903			29,601			6,241			61,107			132,852
Employee Travel				11,300			19,300			-			13,350			43,950
Consultants Travel				18,400			-			-			5,400			23,800
Consultants				7,680			7,200			5,000			2,560			22,440
Communications				100			250			150			150			650
Duplication and Printing				100			150			150			150			550
School Incentives				-			-			-			2,000			2,000
Supplies				100			100			100			100			400
Postage/Courier				250			200			200			200			850
Subtotal ODC's				73,833			56,801			11,841			85,017			227,492
Total Direct Costs				266,712			215,826			45,365			413,299			941,203
Overhead - (Applied to Total Direct Costs)	26.71%			71,239			57,648			12,118			110,393			251,398
Total Costs				337,951			273,474			57,483			523,692			1,192,601

Project Title: Assessment Services Supporting ELs through Technology Systems (ASSETS)

Proposal Submitted by: Center for Applied Linguistics

Performance Period: 10/1/11-9/30/12

Date: May 20, 2011

Funder: U.S. Department of Education (Subaward from University of Wisconsin)

YEAR 3 BUDGET

Line Item	SUMMATIVE ASSESSMENT						SCREENER			BENCHMARKS			TOTAL YEAR 3			
	Grades 1-12 Speaking		Grades 1-12 LRW				Response/Scoring									
	TASK 1:	TASK 2:	TASK 3:	TASK 4:												
	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	
CAL Direct Labor																
Project Director	Dorry Kenyon	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Senior Project Advisor	Meg Malone	0.22	57	28,162	0.00	0	-	0.00	0	-	0.00	0	-	0.22	57	28,162
Project Manager Test Development	Jennifer Christenson	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
TD Project Coordinator - RA IV	TBN	0.08	20	4,992	0.46	120	29,952	0.38	100	24,960	0.00	0	-	0.92	240	59,904
Language Testing Specialist -Speaking RA II	Francesca Di Silvio	0.92	240	60,535	0.00	0	-	0.00	0	-	0.00	0	-	0.92	240	60,535
Language Testing Specialist - Speaking RA II	TBN	0.92	240	49,921	0.00	0	-	0.00	0	-	0.00	0	-	0.92	240	49,921
Language Testing Specialist-Reading RA II	TBN	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Language Testing Specialist -Writing RA II	Anne Donovan	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Project Manager (Benchmarks) Operations	Cathy Cameroon	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	47,305	0.55	142	47,305
Project Manager (Benchmarks) Content	David Gabel	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	45,462	0.55	142	45,462
Item Development Specialist (Benchmarks)	Katharine Merow	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	30,277	0.55	142	30,277
Lead Media Graphics Specialist	Alex Simmons	0.00	0	-	0.00	0	-	0.00	0	-	0.46	120	31,909	0.46	120	31,909
Media Graphics Specialist	Rafael Michelena	0.00	0	-	0.00	0	-	0.00	0	-	0.46	120	25,977	0.46	120	25,977
Lead Programmer	Jorge Murillo	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	36,913	0.55	142	36,913
Programmer	Linda Huang	0.00	0	-	0.00	0	-	0.00	0	-	0.55	142	26,583	0.55	142	26,583
Administrator Training Coordinator	Tatyana Vdovina	0.04	10	2,250	0.04	10	2,250	0.00	0	-	0.00	0	-	0.08	20	4,499
Project Manager Psychometrics/ Research	David MacGregor	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Senior Psychometrician	Shu Jing Yen	0.00	0	-	0.20	52	24,859	0.00	0	-	0.00	0	-	0.20	52	24,859
Data Analyst	TBN	0.00	0	-	0.92	240	70,887	0.00	0	-	0.00	0	-	0.92	240	70,887
Research Assistant II Psychometrics	TBN	0.00	0	-	0.50	130	28,617	0.00	0	-	0.00	0	-	0.50	130	28,617
Research Assistant I Psychometrics	TBN	0.00	0	-	0.50	130	22,174	0.00	0	-	0.00	0	-	0.50	130	22,174
Project Manager Operations	Anna Todorova	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-
Subtotal Direct Labor				145,860			178,739			24,960			244,425			593,984
Fringe Benefits	39.68%			57,878			70,924			9,905			96,988			235,695
Total CAL Personnel Costs				203,738			249,663			34,865			341,413			829,679
Other Direct Costs																
Facility Cost Allocation				37,924			46,473			6,490			63,551			154,438
Employee Travel				13,100			9,750			-			16,100			38,950
Consultants Travel				18,400			-			-			-			18,400
Consultants				7,680			-			-			-			7,680
Communications				150			150			150			150			600
Duplication and Printing				200			150			100			150			600
Software				-			-			-			-			-
Supplies				100			100			100			100			400
Postage/Courier				250			200			200			200			850
Subtotal ODC's				77,804			56,823			7,040			80,251			221,918
Total Direct Costs				281,542			306,486			41,905			421,664			1,051,597
Overhead - (Applied to Total Direct Costs)	26.71%			75,200			81,863			11,193			112,627			280,883
Total Costs				356,742			388,349			53,098			534,291			1,332,480

Project Title: Assessment Services Supporting ELs through Technology Systems (ASSETS)

Proposal Submitted by: Center for Applied Linguistics

Performance Period: 10/1/11-9/30/12

Date: May 20, 2011

Funder: U.S. Department of Education (Subaward from University of Wisconsin)

YEAR 4 BUDGET

Line Item	SUMMATIVE ASSESSMENT									SCREENER			BENCHMARKS			TOTAL YEAR 4		
	Grades 1-12 Speaking			Grades 1-12 LRW						Response/Scoring								
	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost	FTE	Days	Cost			
CAL Direct Labor																		
Project Director	Dorry Kenyon	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-		
Senior Project Advisor	Meg Malone	0.22	57	29,289	0.00	0	-	0.00	0	-	0.00	0	-	0.22	57	29,289		
Project Manager Test Development	Jennifer Christenson	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-		
TD Project Coordinator - RA IV	TBN	0.08	20	5,192	0.46	120	31,150	0.38	100	25,958	0.00	0	-	0.92	240	62,300		
Language Testing Specialist -Speaking RA II	Francesca Di Silvio	0.92	240	62,956	0.00	0	-	0.00	0	-	0.00	0	-	0.92	240	62,956		
Language Testing Specialist - Speaking RA II	TBN	0.92	240	51,917	0.00	0	-	0.00	0	-	0.00	0	-	0.92	240	51,917		
Language Testing Specialist-Reading RA II	TBN	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-		
Language Testing Specialist -Writing RA II	Anne Donovan	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-		
Project Manager (Benchmarks) Operations	Cathy Cameron	0.00	0	-	0.00	0	-	0.00	0	-	0.10	25	8,661	0.10	25	8,661		
Project Manager (Benchmarks) Content	David Gabel	0.00	0	-	0.00	0	-	0.00	0	-	0.10	25	8,324	0.10	25	8,324		
Item Development Specialist (Benchmarks)	Katharine Merow	0.00	0	-	0.00	0	-	0.00	0	-	0.10	25	5,544	0.10	25	5,544		
Lead Media Graphics Specialist	Alex Simmons	0.00	0	-	0.00	0	-	0.00	0	-	0.10	25	6,914	0.10	25	6,914		
Media Graphics Specialist	Rafael Michelena	0.00	0	-	0.00	0	-	0.00	0	-	0.10	25	5,628	0.10	25	5,628		
Lead Programmer	Jorge Murillo	0.00	0	-	0.00	0	-	0.00	0	-	0.10	25	6,759	0.10	25	6,759		
Programmer	Linda Huang	0.00	0	-	0.00	0	-	0.00	0	-	0.10	25	4,867	0.10	25	4,867		
Administrator Training Coordinator	Tatyana Vdovina	0.04	10	2,340	0.04	10	2,340	0.00	0	-	0.00	0	-	0.08	20	4,679		
Project Manager Psychometrics/ Research	David MacGregor	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-		
Senior Psychometrician	Shu Jing Yen	0.00	0	-	0.15	38	18,893	0.00	0	-	0.00	0	-	0.15	38	18,893		
Data Analyst	TBN	0.00	0	-	0.50	130	39,933	0.00	0	-	0.00	0	-	0.50	130	39,933		
Research Assistant II Psychometrics	TBN	0.00	0	-	0.50	130	29,761	0.00	0	-	0.00	0	-	0.50	130	29,761		
Research Assistant I Psychometrics	TBN	0.00	0	-	0.50	130	23,061	0.00	0	-	0.00	0	-	0.50	130	23,061		
Project Manager Operations	Anna Todorova	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-	0.00	0	-		
Subtotal Direct Labor				151,694			145,138			25,958			46,697			369,488		
Fringe Benefits	39.68%			60,193			57,591			10,301			18,530			146,615		
Total CAL Personnel Costs				211,887			202,729			36,259			65,227			516,103		
Other Direct Costs																		
Facility Cost Allocation				39,441			37,736			6,750			12,142			96,069		
Employee Travel				950			3,800			0			4,600			9,350		
Consultants Travel				9,200			0			0			0			9,200		
Consultants				7,680			0			0			0			7,680		
Communications				100			150			150			150			550		
Duplication and Printing				200			150			100			150			600		
Software				0			0			0			0			-		
Supplies				100			100			100			100			400		
Postage/Courier				250			200			200			200			850		
Subtotal ODC's				57,921			42,136			7,300			17,342			124,699		
Total Direct Costs				269,808			244,865			43,559			82,569			640,802		
Overhead - (Applied to Total Direct Costs)	26.71%			72,066			65,404			11,635			22,055			171,160		
Total Costs				341,874			310,269			55,194			104,624			811,962		

Assessment Services Supporting ELs through Technology Systems (ASSETS)

5/23/2011

**Center for Applied Linguistics
Summary Budget**

	Year 1	Year 2	Year 3	Year 4	TOTAL
	10/1/11-9/30/12	10/1/12-9/30/13	10/1/13-9/30/14	10/1/14-9/30/15	10/1/11-9/30/15
CAL Direct Labor Costs	\$ 747,627	\$ 713,711	\$ 829,679	\$ 516,103	\$ 2,807,120
Other Direct Costs	\$ 235,835	\$ 227,492	\$ 221,918	\$ 124,699	\$ 809,944
Total Direct Costs	\$ 983,462	\$ 941,203	\$ 1,051,597	\$ 640,802	\$ 3,617,064
Overhead 26.71%	\$ 262,685	\$ 251,398	\$ 280,883	\$ 171,160	\$ 966,126
Total Costs	\$ 1,246,147	\$ 1,192,601	\$ 1,332,480	\$ 811,962	\$ 4,583,190

Data Recognition Corporation (DRC) Budget Justification

WIDA–Technology Platform: WCER will contract with Data Recognition Corporation (DRC) to provide the delivery platform for all field-testing activities under this grant. The contract will be for \$799,998 in Year 3. DRC will deliver the system required for item banking and online testing as needed to support the test configuration for field testing of at least 7,000 students, in addition to customer support throughout the process.

Direct Labor

Project Manager – Ara Lotzer - (.3 FTE)	\$23,400.00
Project Support & Customer Service Staff – TBD – (.2 FTE)	\$15,600.00
Software Developers – TBD – (4.7 FTE)	\$389,300.00
Quality Assurance Staff – TBD – (2.6 FTE)	\$134,695.00
Item Bank Technology Expert – TBD – (.2 FTE)	\$18,850.00

Fringe Benefits

18.70% -	\$108,805.00
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Other Direct Costs

Travel	\$5,000.00
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Overhead

15% -	\$104,348.00
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Total costs	\$799,998.00
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Project Title: Assessment Services Supporting ELs through Technology Systems (ASSETS)
 Proposal Submitted by: Data Recognition Corporation
 Performance Period: 10/1/11-9/30/15
 Date: May 20, 2011

Line Item	Deliver item bank system and online testing engine and provide support	YEAR 1	YEAR 2	YEAR 3	YEAR 4	TOTAL
Direct Labor						
	Project Manager		Ara Lotzer - .3 FTE	-	-	23,400
	Project Support and Customer Service Staff		TBD - .2 FTE			15,600
	Software Developers		TBD - 4.7 FTEs			389,300
	Quality Assurance Staff		TBD - 2.6 FTE			134,695
	Item Bank Technology Expert		TBD - .2 FTE			18,850
	Fringe Benefits		18.70%			108,805
	Total Personnel Costs		8 FTEs			690,650
Other Direct Costs						
	Facilities Cost Allocation				incl in overhead	
	Employee Travel					5,000
	Consultant Travel					
	Consultants					
	Communications					
	Duplication and Printing					
	School Incentives					
	Supplies					
	Postage/Courier					
	Subtotal ODCs					5,000
	Total Direct Costs					695,650
	Overhead - (Applied to Total Direct Costs)					15.00% 104,348
	Total Costs					799,998

Deliver item bank system and online testing engine and provide support

DRC will deliver the systems required for item banking and online testing as needed to support the test configuration. We will also provide customer support for system users.

Please note that our overhead percentage includes facilities, technology, and administrative expenses applied to all personnel and other direct costs.

Assessment Services Supporting ELs through Technology Systems (ASSETS)

5/23/2011

Summary Budget

	Year 1	Year 2	Year 3	Year 4	TOTAL
	10/1/11-9/30/12	10/1/12-9/30/13	10/1/13-9/30/14	10/1/14-9/30/15	10/1/11-9/30/15
Direct Labor Costs	\$ -	\$ -	\$ 690,650	\$ -	\$ 690,650
Other Direct Costs	\$ -	\$ -	\$ 5,000	\$ -	\$ 5,000
Total Direct Costs	\$ -	\$ -	\$ 695,650	\$ -	\$ 695,650
Overhead 15%	\$ -	\$ -	\$ 104,348	\$ -	\$ 104,348
Total Costs	\$ -	\$ -	\$ 799,998	\$ -	\$ 799,998

Price to WIDA for Field Test Scoring
Writing and Speaking in 2014

	YEAR 4	2014
	Items to Score	Price
Total Writing	31,000	\$48,357
Total Speaking	113,000	\$91,755
Data Management		\$5,260
Project Management		\$12,172
Overhead		\$2,424
TOTAL		\$159,968

WIDA – Scoring: WCER will contract with MetriTech, Inc., under the direction of Susan Feldman, to score all writing and speaking constructed responses during the field test using its online scoring system (MTscore). The contract will be for \$159,968.00 during Year 4.

University of CA – Los Angeles
BUDGET JUSTIFICATION

Cost Estimate Description

Personnel. The following salary rates are based on current salaries and estimates are based on scheduled merit and cost of living increases for staff & faculty in accordance with policy for the same provided system wide for the University of California. Separate salary projections are applied based on the employee's category of faculty 5%, and academic personnel 4%, and graduate and undergraduate students 2%. Faculty salary projections are based on the rank and step in their respective series. These salaries are not duplicated in the facilities and administrative costs or in any other charge presented to the U.S. Department of Education.

- **Alison Bailey (Y1-Y4, .5 months summer salary):** Dr. Bailey will work together with WIDA personnel to develop a new assessment framework for measuring English language proficiency and will provide leadership for the work of UCLA staff studying the impact of new frameworks on teacher assessment and instructional practices with ELL students in a sample of K-12 content and ESL teachers. She will conduct analyses of these classroom practices and results will be reported back to the WIDA personnel in an iterative manner to refine the on-going assessment development efforts under the EAG.
- **Post Doctoral Fellow (One) (Y1-Y2, 12 calendar months):** The Post Doctoral fellow will provide help conceptualize the language learning progressions and create and/or adapt instrumentation for classroom observations and teacher knowledge and practice measures. He/she will also be asked to collect data and conduct analyses of the initial data collected (Y1-2) and contribute to the preparation of results for use in EAG assessment development.
- **GSR (One) (Y3-Y4: 5.88 calendar months):** The Graduate Student Researcher will provide research assistance with data collection in classrooms in Y3 and assist with analysis of the data and the preparation of reports in Y4.
- **Undergraduate Assistant (One) (Y1-Y4: 2.4 calendar months):** The undergraduate assistant will assist in the day-to-day management of efforts, including recruitment of classroom teachers, scheduling of classroom observations and teacher interviews, data management, and document preparation.

Fringe Benefits. Actual rates for named personnel are calculated as a percentage of salary. Rates for unnamed personnel are calculated as a percentage of salary based on current University projections by employee category. Separate benefit rates are applied based on the employee's category of faculty at 12.7% (9.2% academic year and 3.5% summer), academic personnel at 19%, staff personnel (limited appointments at 5.2% and career at 43%), employer contribution to UC Retirement Program at 4%, and graduate and undergraduate students at 1.8%. Additionally, required benefits for each graduate student researcher employed at 25% time or more includes fee remission of \$13,180.14 per academic year for resident students. The fee remission covers the cost of minimum health insurance and partial registration fees, as now required by UCLA

policies and procedures. Graduate student fee remissions are not subject to facilities and administrative costs.

Travel. Estimates are for travel costs of UCLA and project personnel while on project travel status and include airfare, subsistence, reasonable lodging, and vehicle rental or taxi fare. Airfare estimates are based on an average of current coach rates relative to the point of origin/destination when identifiable. Subsistence is based on the University's subsistence allowance following rates set by the State of California and accepted by federal granting agencies currently set at up to \$64/day. Mileage reimbursement rate as set by the IRS is currently .51 cents per mile. All estimates are based on amounts provided by carriers/vendors and/or historical data and include an anticipated 3.5% inflationary increase for the out years.

- UCLA staff travel to WI or DC to meet with WIDA personnel and other project staff: Estimates are for two 4-day trips per year per traveler to discuss assessment framework, report on classroom observation results and evaluate project progress.
- Data Collection: Estimates are for travel costs of project personnel while on project travel status for data collection (interviews and classroom observations). Researcher(s) will travel by car to collect data on a sample of approximately 100 teachers in schools in the spring of Y1 and subsequently up to two times per year in Years 2-4.

Supplies and Services. Expenses in this category pertain to telecommunications, mail, photocopy, and routine and special project supplies such as books and research publications.

- Printing/Photocopying. This is for the cost of document reduplication for the project staff, the reduplication of observation protocols, teacher measures used with the sample of teachers and all reports generated.
- Technology infrastructure fee (TIF) is a consistently-applied direct charge that is assessed to each and every campus activity unit, regardless of funding source, including unites identified as individual grant and contract awards. The TIF pays for campus communication services on the basis of a monthly accounting of actual usage data. These costs are charged as direct costs and are not recovered as indirect costs.

Facilities and Administrative costs. Rates are based on current facilities and administrative cost rates negotiated with the Federal government for UCLA and its subcontractors. GSE&IS is located in an on-campus, and the appropriate facilities and administrative cost rate is applied to based on the university's federally negotiated rates or the sponsoring agency's written policy. The U.S. Department of Education has a 54% F&A Rate policy with the University. As noted in the discussion of fringe benefits, facilities and administrative costs are not applied to graduate student fee remissions.

Budget Detail
The Regents of the University of California, Los Angeles
Alison Bailey
English Language Assessment Development -- WIDA standards
October 1, 2011 - September 30, 2015
FINAL (version 6)
subcontract with WI

<i>Personnel</i>	Title	Months	Percent Effort	Annual Salary	Year 1	Year 2	Year 3	Year 4	Cumulative
					2011-12	2012-13	2013-14	2014-15	
Alison Bailey	P.I.	0.45	5.00%	100,100	5,005	5,255	5,518	5,794	21,572
Margaret Heritage	Public Admin	12.00	0.00%	132,468	0	0	0	0	0
Postdoctoral Fellow	Postdoc	12.00	100.00%	45,000	45,000	47,250	0	0	92,250
Grad. Student	GSR III	12.00	49.00%	44,640	0	0	22,756	23,211	45,966
Undergraduate student	Assistant	12.00	20.00%	20,880	4,176	4,260	4,345	4,432	17,212
Total Personnel					54,181	56,765	32,618	33,436	177,000
<i>Fringe Benefits</i>									
			Rate						
Alison Bailey			12.70%		636	667	701	736	2,740
Margaret Heritage			33.50%						0
Postdoctoral Fellow			20.00%		9000	9450	0	0	18,450
Grad. Student			1.80%		0	0	410	418	827
Undergraduate student			1.80%		75	77	78	80	310
Fee Remission					0	0	16269	17896	34,165
Total Fringe Benefits					9,711	10,194	17,458	19,129	56,492
<i>Travel</i>									
<i>Bailey & Heritage</i>	# of travelers	# of	Daily						
<i>Research Trips to Wisconsin (2 trips per year per traveler)</i>	2	Days	Rate	Amount					
RT Air fare:				425					
Hotel/Subsistence:		8	224	1,792					
Ground transp.		8	38	304					
Related Travel Expense		8	10	80					
Subtotal per Trip				2,601	5,202	5,384	5,573	5,768	21,926
Mileage (Rental Car/Gas)			0.51		2,000	2,000	2,000	2,000	8,000
Total Travel					7,202	7,384	7,573	7,768	29,926
<i>Supplies/Services</i>									
Core Project Supplies					750	750	550	508	2,558
Technology Infrastructure Fee					587	587	337	337	1,848
Total Supplies/Services					1,337	1,337	887	845	4,406
Total Direct Costs					72,431	75,680	58,536	61,178	267,824
F&A Costs @ 54% MTDC			54.0%		39,113	40,867	22,824	23,372	126,176
TOTALS					111,543	116,547	81,360	84,550	394,000
F&A Cost Base					72,431	75,680	42,267	43,282	233,659

BUDGET JUSTIFICATION

Assessment Services Supporting ELs through Technology Systems (ASSETS) October 2011-September 2013

Total Cost: \$680,659.00

Year 1: \$116,963.00

Year 2: \$172,150.00

Year 3: \$173,439.00

Year 4: \$218,107.00

Salaries and Benefits

Employee salaries are based upon WestEd’s fiscal year salary schedule as approved by the agency’s Board of Directors. Salaries include the actual days worked for each employee and earned leave, e.g., holidays, vacations, sick leave, etc. Salary rates are current actual rates, increased where appropriate within the proposal dates to provide for probable cost-of-living adjustments, plus 19.5% for earned leave. WestEd’s minimum working days for one full-time employee (FTE) are 222 per year.

The benefits rate is 43.5% of regular employees’ salaries, and 14.7% of temporary employees’ salaries. Benefits include worker’s compensation, unemployment tax, and FICA for both employee classifications. Regular employees also receive retirement, medical/dental, life insurance, disability insurance, and other staff benefits.

The salaries and benefits cover approximately 10%FTE of Dr. Edynn Sato’s time, 5%FTE of Mr. Jeffrey Eng’s time, and 35%FTE of WestEd research staff time (e.g., relevant content specialists, research associates), as well as time of WestEd administrative and other support staff needed for various project activities over the four years of the proposed project. Relevant project activities generally include project planning meetings, meetings with consortium leaders and key stakeholders, and providing input on and review of project materials, reports, and other key project outcomes. Relevant project activities more specifically include conducting aspects of the project’s validity studies (i.e., cognitive interviews, document and qualitative analyses) and providing guidance as well as engaging in development and evaluation activities related to ensuring that the assessments’ interoperability is maximized.

Additionally, the following WestEd staff will serve as advisors to this project for the designated number of days each year of the project. The daily rate used for advisors’ time, as specified below, is \$1200.00 per day, as established by the project consortium.

Advisor	Year 1	Year 2	Year 3	Year 4
Dr. Aida Walqui	4	4	3	3
Mr. Robert Linqanti	4	8	7	7
Dr. Edynn Sato	4	8	7	7

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Travel

All travel expense reimbursements are based on the Agency's policy. Airfare estimates are based on current average round-trip coach fares provided by the Agency's travel agencies. Lodging is based on average rates for various cities. Per diem is charged at \$45/day or \$11.25/quarter day. For local travel, per diem is as follows: breakfast—9.00; lunch—\$12.00; dinner—\$24.00. For each trip, other expenses include ground transportation (including shuttles, taxis, or trains), parking, tolls, and incidentals. Where appropriate, mileage is charged at \$0.51/mile.

Travel expenses cover research-related travel for WestEd staff related to cognitive interview data collection.

Travel expenses for advisors (Dr. Walqui, Mr. Linquanti, Dr. Sato) were calculated according to the project consortium's per diem charge of \$40/day, and not the Agency's per diem rate. Advisor travel expenses are for two two-day meetings in Years 1 and 2 and one two-day meeting in Years 3 and 4 of the proposed project.

Consultants/Other Personnel

NA

Postage/Telephone*

Postage and telephone expenses include general mailing and telecommunication costs.

Printing/Graphics*

Printing/Graphics expenses include general office copying.

Outside Services

NA

Educational Fees

NA

Supplies and Materials*

The Supplies and Materials category includes general office items such as stationery, pens, writing tablets, markers, clips, notepads, and other similar materials.

The cost of special purchases such as materials for mass mailings are charged directly to the project and not to the general supply pool.

Information Systems

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Information Technology (IT) comprises several different functions or services that directly support projects. It includes:

- **Personal Computers**—This category represents the depreciation charges for computing software and hardware directly assigned to project staff. This includes PCs, monitors, printers, cables, and software packages. The depreciation cost of this equipment is assigned to individual staff members, and is allocated directly to the project they are working on, based on the hours they report on timesheets.
- **IT Support***—This category consists of costs related to providing general technical support to staff on issues related to networks, data recovery, software applications, MAC and PC hardware problems, database support, etc.
- **Common Network***—This category consists of the costs for providing an overall common data network system for the Agency. It includes common equipment such as servers, routers, etc., as well as the maintenance of equipment. In addition, it includes the cost of common operating software as well as software for databases, etc., required to provide WestEd with a data network system.
- **Shared Equipment***—This category consists of costs of equipment such as common printers, toner cartridges, LCD projectors, videoconference equipment, faxes, servers, and routers at each site.

Facility*

Facility represents the rent and/or occupancy of project office space at a specific WestEd location.

Subcontracts

NA

Program Support*

Program support includes administrative services and program services. Administrative services represent expenses such as human resources, purchasing, insurance, legal, membership dues, and general administrative. Program services consist of activities involving staff planning, quality review, staff development, work planning, and staff evaluation; they also include library assistance to WestEd staff.

Indirect

The Agency's indirect cost rate (overhead rate) is negotiated with its cognizant agency, the United States Department of Education. WestEd's 2011 provisional indirect rate is 14.2%. WestEd maintains the right to apply this provisional rate, but for budgeting and management purposes, WestEd currently and typically applies an indirect rate of 12.4%. WestEd's indirect

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cost pool includes Board/Board support, the Executive Director's Office, Resource Development, Communications, Contracts, and Accounting/Finance Services.

Management Fee

The inclusion of fees on contracts awarded to organizations like WestEd has been a common practice by federal agencies for many years. The government recognizes that the cost principles under which contractors can claim reimbursement of costs incurred on a project do not allow recovery of all necessary and pertinent costs of doing business. In order for the contractor to remain viable, a fee must be received. This conclusion has been accepted by the General Accounting Office and is supported by numerous studies conducted on the subject.

* General expenses in these categories are pooled (by office location for facility) and allocated to projects on the basis of labor hours charged. WestEd uses a target allocation rate based on the previous year's actual rate for charging projects as well as for budgeting purposes. This rate may be adjusted during the year to reflect actual performance. The rate is calculated using the accounting application, Costpoint, which sorts by project the hours each employee reports on timesheets (matches the hours with the location code in the employee's master file for facility), calculates the charges, and allocates the costs based on the project account codes reported on the timesheets.

BUDGET SUMMARY

Assessment Services Supporting ELs through Technology Systems (ASSETS) October 2011-September 2013

Expense Classification	Year 1	Year 2	Year 3	Year 4
Salaries and Benefits	76,200.00	107,556.00	118,521.00	149,231.00
Travel	7,680.00	14,265.00	3,840.00	3,840.00
Consultant / Other Personnel / Participant Support	0.00	0.00	0.00	0.00
Postage / Telephone	890.00	1,407.00	1,443.00	1,863.00
Printing / Graphics	448.00	710.00	727.00	938.00
Outside Services	0.00	0.00	0.00	0.00
Educational Fees	0.00	0.00	0.00	0.00
Supplies / Materials	213.00	337.00	347.00	446.00
Information Services	3,560.00	5,580.00	5,668.00	7,310.00
Facility	4,763.00	7,541.00	7,729.00	9,973.00
Subcontracts	0.00	0.00	0.00	0.00
Program Support	5,350.00	8,470.00	8,682.00	11,204.00
Total Direct Costs	99,104.00	145,866.00	146,957.00	184,805.00
Indirect Cost*	12,289.00	18,087.00	18,223.00	22,916.00
Management Fee	5,570.00	8,197.00	8,259.00	10,386.00
Total Task Costs	116,963.00	172,150.00	173,439.00	218,107.00

* Indirect calculated on first \$25K of each subcontract

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