

**Purpose:** This document represents the key activities of the Smarter Balanced Assessment Consortium. For each activity, the document provides the “work start” and “work finish” dates. As this document is a high-level overview of the Master Work Plan, it does not include components such as roles and responsibilities and dependencies. This information is contained in the detailed project plan maintained by the Project Management Partner.

**Audience and Usage:** The primary audiences for this document include Smarter Balanced Governing and Advisory State members, key external stakeholders, and prospective vendors. It is intended to be used to ensure common understanding of the Consortium’s work plan and schedule. Once consensus is reached on the Summative Assessment Work Plan, the results will be used to build the work plans for the other components of the Smarter Balanced assessment including the interim assessment, formative processes and tools, professional development, and transition to Common Core support.

**Document Structure:** This document contains Master Work Plan information at two levels of detail:

- Level 0 (shaded in tan) – Represents the key areas of work that are necessary for the development of the summative assessment
- Level 1 (shaded in light blue) – Represents the key activities including start and end dates for each Level 0 area of work

**Definitions:**

- Work Start and Work Finish – The window in which the work is actually performed; these dates exclude prior activities (e.g., vendor procurement) and subsequent activities (e.g., closing out a contract) that do not substantially contribute to the outcome or scope of that activity.

**NOTES:**

- Dates and scope are subject to change.

- Related materials include a vendor procurement schedule, as well as project schedules in MS Excel and MS Project formats.

ID	Task Name	Work Start	Work Finish
<b>Assessment Design</b>			
1	Conduct Initial Analysis of the Content and Structure of the Common Core State Standards	Dec 2010	Feb 2011
2	Develop Content Specifications for ELA and Mathematics	May 2011	Sep 2011
3	Develop Accessibility and Accommodations Policy Guidelines	Jan 2012	May 2012
4	Develop Item and Task Specifications	Dec 2011	Apr 2012
5	Develop Test Specifications and Blueprints	Feb 2012	May 2012
6	Develop Initial Achievement Level Descriptors	May 2012	Sep 2012
<b>Writing of Items and Tasks</b>			
7	Develop Item and Task Prototypes	May 2011	Sep 2011
8	Write Item and Performance Task Style Guide	Dec 2011	Apr 2012
9	Develop Accessibility Guidelines for Item and Task Development	Dec 2011	Apr 2012
10	Develop and Distribute Item/Task Writing Training Materials	Feb 2012	Mar 2012
11	Review and Vet State-Submitted Items and Tasks for Inclusion in Smarter Balanced Item Pool	Mar 2012	Jul 2013
12	Write Pilot Test Items and Tasks	Mar 2012	Sep 2012
13	Develop Innovative Item and Task Types	Mar 2012	Jul 2013
14	Plan and Conduct Small-Scale Trials of New Item and Task Types	Mar 2012	Aug 2012
15	Develop Initial Automated Scoring Approach	Mar 2012	Sep 2012
16	Develop Smarter Balanced Item and Task Writing Participation Policies and Guidelines	Feb 2012	Oct 2013
17	Develop Content and Bias/Sensitivity Pilot Item and Task Review Materials	Feb 2012	May 2012
18	Conduct Content and Bias/Sensitivity Reviews of Passages and Stimuli	Mar 2012	May 2012
19	Conduct Content and Bias/Sensitivity Pilot Item and Task Review Meeting	Jul 2012	Sep 2012
20	Revise Pilot Items and Tasks Based on Content and Bias/Sensitivity Committee Feedback	Aug 2012	Oct 2012
21	Write Field Test Items and Tasks	Aug 2012	Aug 2013
22	Develop Translation Framework and Specifications Languages	Sep 2012	Aug 2013
23	Translate Pilot and Field Test Items and Tasks into Identified Languages	Nov 2012	Aug 2013
24	Develop Content and Bias/Sensitivity Field Test Item and Task Review Materials	Apr 2013	Aug 2013

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ID	Task Name	Work Start	Work Finish
25	Conduct Content and Bias/Sensitivity Field Testing Item and Task Review Meeting	Jun 2013	Oct 2013
26	Revise Field Test Items and Tasks Based on Content and Bias/Sensitivity Committee Feedback	Sep 2013	Nov 2013
<b>Pilot Testing</b>			
27	Develop Pilot Testing Deployment Plan	May 2012	Jul 2012
28	Develop Pilot Test Administration Materials	May 2012	Aug 2012
29	Select Items and Tasks for Pilot Test Forms	Aug 2012	Nov 2012
30	Load and Review Pilot Test Items and Tasks	Oct 2012	Dec 2012
31	Conduct Pilot Assessment System Integration Testing	Oct 2012	Jan 2013
32	Pilot Testing Administration	Feb 2013	Mar 2013
33	Score Pilot Test Responses	Feb 2013	Apr 2013
34	Conduct Psychometric Analysis to Support Pilot Test Data Review	Mar 2013	May 2013
35	Develop Pilot Test Item and Task Data Review Materials	Feb 2013	Apr 2013
36	Conduct Pilot Test Item and Task Data Review	Apr 2013	May 2013
37	Conduct Analysis of Pilot Test	Mar 2013	May 2013
<b>Field Testing</b>			
38	Develop Field Test Deployment Plan	May 2012	Oct 2013
39	Update Field Test Administration Materials	May 2013	Sep 2013
40	Conduct Field Test Assessment System Integration Testing – Preliminary	Sep 2013	Nov 2013
41	Load and Review Field Test Items and Tasks	Jul 2013	Jan 2014
42	Final Field Test Forms Verification	Feb 2014	Feb 2014
43	Conduct Field Test Assessment Systems Testing – Final Verification	Jan 2014	Mar 2014
44	Field Test Administration	Mar 2014	Jun 2014
45	Score Field Test Responses	Mar 2014	Jul 2014
46	Conduct Psychometric Analysis to Support Field Test Data Review	May 2014	Jun 2014
47	Develop Field Test Item and Task Data Review Materials	Apr 2013	Jun 2014
48	Conduct Field Test Item and Task Data Review	Jun 2014	Jul 2014

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Research and Evaluation			
49	Plan and Execute Four-Year Research Agenda	May 2012	Sep 2014
50	Develop Research Agenda Implementation Strategy	May 2012	Sep 2014
51	Establish Psychometric Services	Feb 2012	Sep 2014
52	Determine Standard-Setting Design	Feb 2012	Feb 2014
53	Develop Preliminary Standard-Setting Materials	Apr 2014	Aug 2014
54	Conduct Preliminary Standard Setting	Aug 2014	Aug 2014
55	Develop CAT Specifications and Conduct Initial CAT Simulation Studies	Feb 2012	May 2012
56	Determine Linking and Equating Design for Special Forms	Feb 2012	Feb 2012
57	Determine Vertical Scale Design	Feb 2012	Mar 2012
58	Select Anchor Items and Tasks for Calibration and Building the Vertical Scale	May 2013	Feb 2014
59	Conduct Psychometric Analysis to Support Item and Task Calibration	Jun 2014	Jul 2014
60	Conduct CAT Simulation Study using Pilot Test Data	Jun 2013	Aug 2013
61	Conduct CAT Simulation Study Using Field Test Data – Final CAT Algorithm Verification	Jul 2014	Sep 2014
62	Develop Technical Manuals	Feb 2012	Sep 2014
Technology Development			
63	Develop IT Readiness Tool	Dec 2011	Mar 2012
64	Maintain and Support IT Readiness Tool	Mar 2012	Sep 2014
65	Establish IT Systems Architecture	Sep 2011	Dec 2011
66	Conduct IT Systems Integration Architecture Maintenance and Support Services	Feb 2012	Sep 2014
67	Develop Item Authoring and Item Pool Applications	Apr 2012	Jul 2013
68	Determine Initial Reports Reflecting Content Specifications and Bundling Activity	Jul 2012	Oct 2012
69	Design Beta Reports	Aug 2012	Nov 2012
70	Conduct Small-Scale User Acceptance Testing on Beta Reporting System	Nov 2012	Mar 2013
71	Design Support Materials for Implementation of Reporting System	Apr 2013	Jul 2014
72	Determine Reports and Reporting System for Large-Scale User Acceptance Testing	Apr 2013	Aug 2013
73	Conduct Large-Scale User Acceptance Testing of Reporting System	Sep 2013	Mar 2014

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74	Determine Technology Approach for Pilot Test	May 2012	Jul 2012
75	Implement Technology Systems for Pilot Test	May 2012	Jan 2013
76	Determine Technology Approach for Field Test	Mar 2013	May 2013
77	Implement Technology Systems for Field Test	Jun 2013	Feb 2014
78	Develop Technology Systems for Operational Administration	May 2012	Dec 2013
79	Conduct Overall Systems Test of Smarter Balanced Technology	Sep 2013	Apr 2014
80	Support Technology Deployment for Operational Administration	Oct 2013	Sep 2014
<b>Governance and Project Management</b>			
81	Initiate Project	Oct 2010	Apr 2011
82	Perform Governance and Compliance Monitoring Activities	Oct 2010	Sep 2014
83	Monitor Project	Oct 2010	Sep 2014
84	Perform Financial Management Activities	Oct 2010	Sep 2014
85	Oversee Vendors	Dec 2010	Sep 2014
86	Prepare and Conduct Project Status Reviews	Jan 2011	Sep 2014
87	Develop and Implement Business Plan for Post-2014	Jul 2011	Oct 2014
<b>Communications</b>			
88	Develop Initial Communications Materials	Oct 2010	Dec 2010
89	Develop Initial Smarter Balanced Web Presence	Oct 2010	Sep 2011
90	Develop Long-term Smarter Balanced Web Presence	Jul 2011	Jan 2012
91	Implement Communication Plan Activities – Internal Stakeholders	Oct 2010	Sep 2014
92	Implement Communication Plan Activities – External Stakeholders	Oct 2010	Sep 2014
93	Develop Communication Strategy and Plan	Nov 2010	Jul 2011
94	Select and Engage Communications Service Provider	Feb 2011	Apr 2011
95	Develop Policies and Procedures for Managing Smarter Balanced Document Distribution and Revision	Oct 2011	Sep 2014

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