



# LEARNING POINT

## Planning: what role does it play in the formative assessment process?

Effective instructional planning in the formative assessment process is informed by the teacher's knowledge about what students already know

**“A planned process: formative assessment involves a series of carefully considered, distinguishable acts on the part of teachers or students, or both.”**

—W. James Popham

student self- and peer assessment, and helping students to make adjustments to learning.

Planning in the formative assessment process includes the knowledge of tools and strategies that may be used in both formal (planned) and informal (in the moment) assessment and interactions to gather evidence and inform instruction (e.g., Cowie & Bell, 2001). Thus, planning is an important, often overlooked step in intentionally preparing for all elements of the formative assessment process and anticipating what might happen in a lesson.

### Planning defined

As outlined above, instructional planning in the formative assessment process can be described as systematically preparing for teaching and learning, including the identification of instructional targets, instructional methods, and the systematic and ongoing evaluation and management of the instructional and assessment processes.

*“I used to jump right into a lesson without really knowing how I would know what students learned and*

and can do. The teacher then intentionally plans the steps in his or her lesson based on:

- a target for learning,
- instruction to be provided,
- when and how evidence of student learning will be gathered.
- how this evidence will be analyzed, and
- what types of change in instruction and student learning might be necessary, depending on what the evidence of student learning might show

The teacher also must plan for the student's role in the learning process, such as how students will be involved in understanding the learning target,

## To learn more

### Formative assessment: What do teachers need to know and do?

Margaret Heritage. *Phi Delta Kappan*, 89(2), 140–146.  
<https://bit.ly/3yvG0PJ>

### ALN Learning Point: What constitutes a high-quality, comprehensive, balanced assessment system.

Michigan Assessment Consortium (2016)  
<http://bit.ly/BalancedSystem>

### Learning Point: What do we mean by Formative Assessment?

Michigan Assessment Consortium (2017)  
<https://bit.ly/3yvG0PJ>

didn't learn. One of the areas I've been working on is planning my assessment map for each unit or series of lessons. This allows me to be more organized and understand what assessment data can be used formatively." – 4th grade teacher

## Instructional planning tools

The formative assessment process includes various components and elements that are interconnected to support student learning. Intentional planning is key for a teacher to ensure the students understand:

- the target for their learning
- the criteria for meeting that target, and
- ways to receive support when needed.

A planning template, such as the Instructional Planning Recording Form shown in Figure 1, can be a useful tool to help teachers think through the various components of formative assessment when planning.

## Developing proficiency with instructional planning

in the formative assessment process Teachers seeking to develop competence with instructional planning must focus on several key aspects of planning:

- when or how evidence of student learning will be obtained
- different levels of student understanding that might be shown, and
- how the lesson might change as a result of evidence of student understanding.

This planning includes anticipating various ways students might respond to the lesson and how to proceed if learning does not progress as planned. It also requires knowledge of tools and strategies that can be planned in advance or used in the moment as needed. Finally, becoming proficient with planning

enables the teacher to become more explicit about making connections with past and future learning goals for students.

A list of indicators of successful practice are shown in Figure 2 for teachers to use as they develop proficiency with instructional planning.

**Figure 1:** Formative Assessment Planning and Recording Form

**Figure 2:** Indicators of Successful Practice for Instructional Planning in the Formative Assessment Process

## Indicators of successful practice

The indicators of successful practice outline the key aspects of planning in the formative assessment process. They can be used for self-assessment and to set goals as a teacher develops proficiency with instructional planning in the formative assessment process.

- The teacher intentionally plans in advance.
- The teacher's planning reflects formative assessment process knowledge, content knowledge, pedagogical knowledge, and knowledge of students.
- Planning includes when and how evidence of student learning will be obtained and used.
- The teacher plans for when student learning does not progress as planned.
- Students are able to build knowledge over time.