

Assessment Planning Checklist


Formative vs. Summative Assessment

Overview & Balance Planner

Use this quick checklist to plan your school's assessment mix, grade weighting, and communication rhythm for the coming term.

Find Your Assessment Balance

Element	Recommended Target	Your Plan
Formative assessments	5–7 touch points per unit	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Summative assessments	2–4 per term	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Formative : Summative ratio	30–40% : 60–70%	_____
Low-stakes opportunities	Weekly	<input type="checkbox"/>
Feedback turnaround time	48 hours	<input type="checkbox"/>
Parent update cadence	Biweekly	<input type="checkbox"/>
Student reflection moment	End of each unit	<input type="checkbox"/>

 **Tip:** Treat formative tasks as “practice.” Record them in your gradebook for visibility, but keep their weight low.

Gradebook Weighting Template

Course Formative Weight Summative Weight Notes

English	30%	70%	Use rubrics for essays
Math	40%	60%	Include quick checks weekly
Science	35%	65%	Labs count as formative
Electives	50%	50%	Focus on projects

Term Goals

- ☐ Teachers align on common formative assessments.
 - ☐ Rubrics reviewed before first summative.
 - ☐ Gradebook weights confirmed & published.
 - ☐ Families informed about assessment policy.
 - ☐ Reporting templates tested.
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Communication, Compliance & Reflection

Keep your school assessment-ready and audit-proof, without spreadsheets.


Parent & Student Communication Plan

Step	Frequency	Channel	Person Responsible
Progress snapshot	Every 2–3 weeks	Parent Portal	Homeroom teacher
Report card review	End of term	PDF export	Admin
Reminders	Before summatives	Email / SMS	Teacher
Reflection notes	After projects	Class post	Student + Teacher

Compliance & Recordkeeping

Record Type	Tool / Source	Checked
Attendance logs	Attendance Management	<input type="checkbox"/>
Grade summaries	Academic Management	<input type="checkbox"/>
Rubrics & samples	Cloud storage / SIS	<input type="checkbox"/>


State forms	PDF exports	<input type="checkbox"/>
Parent notifications	Notifications module	<input type="checkbox"/>

 **Tip:** Export once per term, store copies digitally for audits.

Reflection & Improvement

Rate each statement 1–5
(1 = Not yet / 5 = Fully in place)

Focus Area	Rating (1–5)	Notes
We use formative data to adjust teaching		
Students know what success looks like		
Parents understand our assessment approach		
Teachers share rubrics before grading		
Summatives measure true mastery		
Our system makes data easy to access		

 **At end of term:** Hold a 30-minute reflection meeting with teachers using this page as the agenda.