Design Reports that Make Data “Over-the-Counter” & Easy to Use

Jenny Grant Rankin, Ph.D.
University of Cambridge

#TIBCONOW2017
@OTCData

October 26, 2017
Content Covered
Tool Used

TIBCO Jaspersoft
Tool Used

TIBCO Jaspersoft:

- Meets company needs
Tool Used

TIBCO Jaspersoft:

- Meets *company* needs
- Meets *client* needs
Tool Used

TIBCO Jaspersoft:

- Meets company needs
- Meets client needs
- Community of support
TIBCO Jaspersoft:

- Meets **company** needs
- Meets **client** needs
- Community of **support**
- Makes it easy to make data **over-the-counter**
Handout

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  Design Reports that Make Data “Over-the-Counter” & Easy to Use

Design Reports that Make Data “Over-the-Counter” & Easy to Use
TIBCO NOW, October 26, 2017

Jenny Grant Rankin, Ph.D., University of Cambridge (PostDoc Masterclass)
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Tools
OTCD Data Reporting Standards
http://www.overthecounterdata.com/OTCDataStandards.pdf

Supplemental Doc Templates
http://www.overthecounterdata.com/templates

Resources
http://www.overthecounterdata.com/resources

Books http://www.amazon.com/author/jennyrankin

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Over-the-Counter Data

- Users’ Data Interpretation Accuracy
  307% More Accurate with Report Footers
  300% More Accurate with Reference Sheets
  436% More Accurate with Reference Guides
  50% More Tasks Accomplished with Targeted Help System & 40% Less Training Time

Data Report/System Package/Display & Content

Have Critical Impact on Use & Accuracy
Your Data
Accuracy of Interpretation of Data
College-Educated Educators

Accuracy of Interpretation of Data
College-Educated Educators

Accuracy of Interpretation of Data

11% (Rankin, 2013)
College-Educated Educators

Accuracy of Interpretation of Data

11-48%

- Rankin, 2013

College-Educated Educators
College-Educated Parents

Accuracy of Interpretation of Data


Rankin, 2013

Accuracy of Understanding of Data

11-48%
College-Educated Parents

Accuracy of Interpretation of Data

11-48%


Rankin, 2013

Accuracy of Understanding of Data

60%
College-Educated Parents

- 11-48% Accuracy of Interpretation of Data
  - Rankin, 2013

- 0% Accuracy of Understanding of Data
  - Kannan, Zapata-Rivera, & Leibowitz, 2016

60%
College-Educated Parents

- **Accuracy of Interpretation of Data**
  - 11-48%
    - Rankin, 2013

- **Accuracy of Understanding of Data**
  - 0-50%
    - Kannan, Zapata-Rivera, & Leibowitz, 2016
    - Kannan, Zapata-Rivera, & Leibowitz, 2016
How can we display data so it is easy to understand?
How can we display data so it is easy to understand?

Answer: Make data “over-the-counter”
Over-the-Counter Data (OTCD) Standards

For: Data systems, visualizations, & reports that communicate important data
Purpose: Foster optimal user understanding, interpretation, & use of data viewed

Label

Just like over-the-counter medicine, data needs to be properly labeled to ensure it is used easily and appropriately. Label standards are organized by Titles and Footers.

1.1 Titles

Title refers to the name of a report that communicates education data. The 1.1 standards pertain to title design.

1.1.01 Present
Give each report its own, distinct title that remains consistent between (a) when it is displayed within a report list and (b) when it is featured directly on the report, in which case it should be prominent at the top of the page.

1.1.02 Communicate What Is Inside the Report
Clearly communicate what type of data the report displays and/or how it displays data (e.g., report type). Use a title that functions well both (a) when the report is closed and users are determining which report(s) to open/view in the data system, and (b) when the report is open (viewed within the data system or printed) and users need a quick indication of its contents.

1.1.03 Use Consistent Titling System
Utilize a consistent titling system within the data system or report suite. E.g., if one report title ends with the word “List” to indicate its format involves listing scores of multiple entities, titles of like reports should also end with “List”.

1.1.04 Use Concise Language That Maximizes Info Communicated
Be concise while also communicating the most pertinent info a user needs to know when determining if this is the report he or she needs. I.e., do not try to accommodate all of a report’s descriptors in its title. Be as concise as good sense allows; e.g., the term “3-Y” works better than “Multi-Y” in the title of a report that displays up to 3 years of data because “3-Y” communicates more info while also using fewer characters (reducing clutter).

1.1.05 Leave Some Info for the Header &/or Input Controls
Do not cram ancillary info (that can be determined by users’ input control selections) into the title. Instead, let users control details like “Subjects: Asian,” “Grouped by: Course,” etc. and display these selections under the report’s title in less prominent font.
STANDARDS FOR REPORTING DATA TO EDUCATORS
What Educational Leaders Should Know and Demand

Jenny Grant Rankin
Over-the-Counter Medicine → Over-the-Counter Data

Flu
Over-the-Counter Medicine

Over-the-Counter Data

Content

Content
Over-the-Counter Medicine

Over-the-Counter Data
Over-the-Counter Medicine

Over-the-Counter Data
Content

All (but not more) than needed

Figure It Out

Emotion

Audience
Accountability Dashboard
Illumine School District

Enrollment

Enrollment by Ethnicity

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Female</th>
<th>Male</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Indian or Alaska</td>
<td>0.3%</td>
<td>0.4%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Alaska Native</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian</td>
<td>0.8%</td>
<td>0.8%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Black or African American</td>
<td>4.2%</td>
<td>4.6%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Filipino</td>
<td>1.0%</td>
<td>1.0%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Hispanic / Latino</td>
<td>15.2%</td>
<td>15.6%</td>
<td>30.9%</td>
</tr>
<tr>
<td>Native Hawaiian or Other</td>
<td>0.7%</td>
<td>0.7%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Pacific Islander</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>26.5%</td>
<td>28.1%</td>
<td>54.6%</td>
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</table>

Enrollment by Grade Level

<table>
<thead>
<tr>
<th>Grade Level</th>
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<th>Male</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>Preschool</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>T. Kinder</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Kindergarten</td>
<td>2%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>1st Grade</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>2nd Grade</td>
<td>4%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>3rd Grade</td>
<td>4%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>4th Grade</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>5th Grade</td>
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<td>4%</td>
<td>8%</td>
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<td>8%</td>
</tr>
<tr>
<td>9th Grade</td>
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<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>10th Grade</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>11th Grade</td>
<td>3%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>12th Grade</td>
<td>2%</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Enrollment by Program Eligibility

<table>
<thead>
<tr>
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<th>Male</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>English Learner</td>
<td>2.2%</td>
<td>2.6%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Socioeconomically</td>
<td>28.2%</td>
<td>30.1%</td>
<td>58.3%</td>
</tr>
<tr>
<td>Disadvantaged</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Education</td>
<td>5.2%</td>
<td>10.1%</td>
<td>15.3%</td>
</tr>
</tbody>
</table>

State Assessments (CAASPP)

SBA ELA
% of Students Meeting or Exceeding Standard

<table>
<thead>
<tr>
<th>Year</th>
<th>Goal</th>
<th>% Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>50%</td>
<td>45%</td>
</tr>
</tbody>
</table>

SBA Math
% of Students Meeting or Exceeding Standard

<table>
<thead>
<tr>
<th>Year</th>
<th>Goal</th>
<th>% Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>50%</td>
<td>32%</td>
</tr>
</tbody>
</table>

CST Science
% of Students Proficient or Advanced

<table>
<thead>
<tr>
<th>Year</th>
<th>Goal</th>
<th>% Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>50%</td>
<td>81%</td>
</tr>
</tbody>
</table>

Local Interim Assessments

ELA
% of Students ELA Proficient

<table>
<thead>
<tr>
<th>% Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>51%</td>
</tr>
</tbody>
</table>

Math
% of Students Math Proficient

<table>
<thead>
<tr>
<th>% Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>32%</td>
</tr>
</tbody>
</table>
Participant Lifestyle’s Impact on Plant Growth

- Exercises at last 5 days per week: 0%
- Eats healthy (e.g., lean and vegan): 12%
- Watches at least 1 hour of TV per day: 58%
- Watches at least 4 hours of TV per day: -2%

(Outing & Ruel, 2006)

Most viewed

(Conner-Simons, 2015)
School's Average % Correct
In Each Area on State Math Test

Clusters vary in difficulty, so the Site's highest % correct is not necessarily a strength.
Compare the Site % to the State Minimally Proficient % (i.e., look at the degree to which the Site beat the SMP):
Site % - SMP % > 0 (cluster with highest difference could be Site strength, lowest difference could be Site weaknesses).

understanding of data (Rankin, 2015)
# 2015-16 WIDA ACCESS Student List

**Site:** President Hyatt  
**Includes:** All WIDA ACCESS Levels

**Proficiency Levels:**  
- 6-Reaching  
- 5-Bridging  
- 4-Expanding  
- 3-Developing  
- 2-Emerging  
- 1-Entering

<table>
<thead>
<tr>
<th>Student</th>
<th>ID</th>
<th>EL</th>
<th>Current Grade</th>
<th>District Entry Date</th>
<th>Test Date</th>
<th>Listening</th>
<th>Speaking</th>
<th>Reading</th>
<th>Writing</th>
<th>Oral</th>
<th>Literacy</th>
<th>Comp</th>
<th>Overall**</th>
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<tbody>
<tr>
<td>Abbott, Aidan</td>
<td>66295</td>
<td>Y</td>
<td>4</td>
<td>08-01-12</td>
<td>02-24-16</td>
<td>5.9</td>
<td>2.8</td>
<td>3.8</td>
<td>2.7</td>
<td>4.1</td>
<td>3.0</td>
<td>4.7</td>
<td>3.4</td>
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<tr>
<td>Abbott, Graham</td>
<td>72901</td>
<td>Y</td>
<td>1</td>
<td>08-01-13</td>
<td>02-22-16</td>
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<td>1.0</td>
<td>1.0</td>
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<td>1.0</td>
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<td>10</td>
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<td>02-05-16</td>
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<td>1.6</td>
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<td>3.8</td>
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<td>4.7</td>
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<td>4.1</td>
<td>4.5</td>
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<td>6.0</td>
<td>4.6</td>
<td>5.8</td>
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<td>5.6</td>
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<td>02-05-16</td>
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<td>6.0</td>
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<td>02-02-16</td>
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<td>4.8</td>
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<td>02-12-16</td>
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<td>6.0</td>
<td>1.9</td>
<td>1.9</td>
<td>1.9</td>
</tr>
</tbody>
</table>

*COMPOSITE LEVELS*  
- Oral Language: 50% Listening + 50% Speaking  
- Literacy: 50% Reading + 50% Writing  
- Comprehension: 70% Reading + 30% Listening  
- Overall: 35% Reading + 35% Writing + 15% Listening + 15% Speaking

**Overall score is calculated only when all four domains have been assessed. NA: Not available**

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CST Performance Report

This page provides an abstract for the CST Performance report, which shows a school site’s performance on California Standards Test (CST) content clusters in relation to the state’s performance (scores of students statewide who scored Proficient on the CST).

**Purpose**

What are some questions this report will help answer?
- What are possible weaknesses for my school site (in a grade and subject area)?
- What are possible strengths for my school site (in a grade and subject area)?
- Which content clusters were assessed with the hardest questions on this CST?
- Which content clusters were assessed with the easiest questions on this CST?

**Focus**

Who is the intended audience?
Teachers and administrators

What data is reported?
Students’ average % correct when answering questions aligned to each CST content cluster is displayed for:
- a school site
- the State Minimally Proficient (meaning all students in California who scored the minimum scale score needed – 250 – to be considered Proficient on this CST)

How is the data reported?
The school site is graphed in blue, and the State Minimally Proficient is graphed in orange.

**Warning**

What do many educators misunderstand?
Content clusters vary in difficulty, so a site’s highest % correct for a cluster does not necessarily indicate its strength, and its lowest % correct for a cluster is not necessarily its weakness. For each cluster, compare the Site % to the State Minimally Proficient % (i.e., look at the degree to which the Site beat the State Minimally Proficient). Use this formula:

\[
\text{School Site} \% - \text{State Minimally Proficient} \% = \# 
\]

The cluster with the highest difference (highest # from above formula) could be a Site strength, and the cluster with the lowest difference (lowest # from above formula) could be a Site weakness.

understanding of data (Rankin, 2015)
CST Performance Report
Reference Sheet

This page provides an abstract for the CST Performance report, which shows a school site’s performance on California Standards Test (CST) content clusters in relation to the state’s performance (scores of students statewide who scored Proficient on the CST).

Purpose

What are some questions this report will help answer?

- What are possible weaknesses for my school site (in a grade and subject area)?
- What are possible strengths for my school site (in a grade and subject area)?
- Which content clusters were assessed with the hardest questions on this CST?
- Which content clusters were assessed with the easiest questions on this CST?

Illustrated

Grade 7 English-Language Arts CST Performance
(Average Percent Correct on Each Content Cluster)

Clusters vary in difficulty, so the Site’s highest % correct is not necessarily a strength.

Compare the Site % to the State Minimally Proficient % (i.e., just at the degree to which the Site beat the SWP).

State Minimally Proficient

Cluster with highest difference could be site strength, lowest difference could be site weakness.
Focus

Who is the intended audience?
Teachers and administrators

What data is reported?
Students' average % correct when answering questions aligned to each CST content cluster is displayed for:
• a school site
• the State Minimally Proficient (meaning all students in California who scored the minimum scale score needed – 350 – to be considered Proficient on this CST)

How is the data reported?
The school site is graphed in blue, and the State Minimally Proficient is graphed in orange.

Warning

What do many educators misunderstand?
Content clusters vary in difficulty, so a site's highest % correct for a cluster does not necessarily indicate its strength, and its lowest % correct for a cluster is not necessarily its weakness. For each cluster, compare the Site % to the State Minimally Proficient % (i.e., look at the degree to which the Site beat the State Minimally Proficient). Use this formula:

\[
\text{School Site} \% - \text{State Minimally Proficient} \% = \#.
\]

The cluster with the highest difference (highest # from above formula) could be a Site strength, and the cluster with the lowest difference (lowest # from above formula) could be a Site weaknesses.
CST Performance Report

Reference Guide

Purpose: What are some questions this report will help answer?
- What are possible weaknesses for my school site (by grade and subject area)?
- What are possible strengths for my school site (by grade and subject area)?
- Which content clusters were assessed with the hardest questions on the CST?
- Which content clusters were assessed with the easiest questions on the CST?

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How is the data reported?
The school site is graphed in blue, and the State Minimally Proficient is graphed in green.

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Content clusters vary in difficulty; a site’s highest % correct for a cluster does not necessarily indicate its area of strength, and its lowest % correct for a cluster is not necessarily its weakness. For each cluster, compare the Site % to the State Minimally Proficient % (i.e., look at the degree to which the Site beat the State Minimally Proficient). Use this formula:

\[
\text{School Site %} - \text{State Minimally Proficient %} = F
\]

The cluster with the highest difference (highest % from above formula) could be a Site strength, and the cluster with the lowest difference (lowest % from above formula) could be a Site weakness.

understanding of data (Rankin, 2015)
**CST Performance Report**

**Reference Guide**

This 2-page guide explains the CST Performance report, which shows a school's state performance on California's Standards Test (CST) content clusters in relation to the state's performance (score of students statewide who scored proficient on the CST).

**Purpose**

What are some questions this report will help answer?
- What are possible weaknesses for my school site in a grade and subject area?
- What are possible strengths for my school site in a grade and subject area?
- Which content clusters were assessed with the hardest questions on the CST?
- Which content clusters were assessed with the easiest questions on the CST?

**Focus**

Who is the intended audience?
Teachers and administrators.

What data is reported?
Students' average percent correct when answering questions aligned to each CST content cluster is displayed for:
- A school site
- The State Minimally Proficient (meaning all students in California who scored the minimum scale score of 350 to be considered proficient on the CST)

How is the data reported?
The school site is graphed in blue, and the State Minimally Proficient is graphed in green.

**Warning**

What do many educators misunderstand?
Content clusters vary in difficulty, so a site's highest % correct for a cluster does not necessarily indicate its strength, and its lowest % correct for a cluster is not necessarily its weakness. For each cluster, compare the Site % to the State Minimally Proficient % (i.e., look at the degree to which the Site beat the State Minimally Proficient). Use the formula:

\[
\text{School Site %} - \text{State Minimally Proficient %} = S
\]

The cluster with the highest difference (highest # from above formula) could be a site strength, and the cluster with the lowest difference (lowest # from above formula) could be a site weakness.
**Instructions**

How do I read the report?

The bars show you the % of questions students answered correctly when answering questions aligned to each CST content cluster. %s above blue bars are results of students at the School Site, and %s above orange bars are results of students statewide who scored the minimum scale score needed (350) to be considered Proficient on this CST.

Example: The State Minimally Proficient students and the School Site’s students both answered 72% of Qs correctly in this CST’s Statistics cluster.

**Essential Questions**

What are possible weaknesses for my school site (in a grade and subject area)?

Determine the cluster in which you most lagged behind the State Minimally Proficient’s (SMP’s) students (or beat them to the least degree). Since clusters vary in difficulty, SMP %s account for how easy or hard the clusters were. Use this formula:

\[
\text{School } % - \text{ SMP } % = #
\]

Example: For the Decimals cluster:

\[
\text{School } 70\% - \text{ SMP } 76\% = -6
\]

More than for any other cluster, Site did most poorly on the Decimals cluster (because of how Site compared to SMP).
Where can I find more info on the CST and its proper analysis?

Where can I find more info on analyzing CST content clusters?
Visit the Help system's Data Analysis manual.

Where can I learn how to generate this report in my data system?
Visit the Help system's Reports manual.

More Info
Supplemental Doc

Accountability Dashboard

Description: This is an abstract for the Accountability Dashboard, which summarizes a district’s or site’s performance on a wide variety of metrics.

Purpose: This report summarizes a district’s or site’s performance on a wide variety of metrics. The dashboard includes a setup screen, the report itself, and the Metric Information and Descriptions page.

Navigation: Reports > List Reports > Pred built > Accountability

Please visit this document for information regarding the Accountability Dashboard Data Requirements and Specifications needed to run the report.

Focus

Who is the intended audience?
Teachers and Administrators

What data is reported?
- Enrollment: By Ethnicity, By Program Eligibility, By Grade Level
- State Assessments: By Subject (CA, AZ, MI, and GA only)
- Local Interim Assessments: By Subject
- English Learner: Reclassification and Proficiency (CELDT, CA, AZELLA) A-Z, M-STEP (MI)
- Early Acceptance Project: By Subject
- Advanced Placement: Pass Rate, Testing Rate, Enrollment Rate
- College & Career Readiness: A-G Completion Rate, Graduation Rate, CTE Pathways
- Attendance (currently available for 315 clients only): Average Daily Attendance, Chronic Absenteeism
- Behavior: Suspension Rate, Expulsion Rate

*CA Only

How is the data reported?
Each section belongs to a specified metric, which is then displayed either by a bar chart or bullet chart to show comparative analytics or to show whether or not a district’s goal was met.

The last few pages of the report provide Metric Information and Descriptions for each specified metric.
Welcome Back,
Joao Barbosa

Site Admin Insights 2

Demographics

Reported Race Population Distribution
- 32% White
- 19% Asian
- 16% American Indian
- 12% Native American
- 8% Hispanic
- 5% Latina
- 1% Cape Verdean

Behavior

Suspensions This Semester
- 14

Attendance

Teacher's Missing Attendance
- Laurent Yabush
- Gary Hansen
- Nicole Garcia
- Mark Watts

Navigation

Create Minor Incident

Create MAJOR Incident

Students

This Week's Birthdays!
- 11
2016-17 EOC
Student Assessment Results

James Smith
1234567
Overall Score
770 Excellent

Site: President Washington
Grade: 10

Fall/Winter Biology
Overall Performance
Subclaim Performance

- Science as Inquiry: 89%
- Life Science: 92%
- Earth and Space Science: 83%

More information about this report can be found at help.illuminateded.com.

Overall Score Levels
4 Excellent
3 Good
2 Fair
1 Needs Improvement

Generated on 09/05/2017 by Illuminate Education
Package/Display & Content
1854
1854

500

☤
Format Most Appropriate for Analysis
1855

1.1 mil
1855

1.1mil
1855

1.1mil

Graph as Appropriate
1986
1986

Vital Data was not included
TIBCO NOW 2017

Q & A

Jenny Grant Rankin, Ph.D.
University of Cambridge

#TIBCONOW2017
@OTCData

www.overthecounterdata.com/presentations

October 25, 2017