

A close-up photograph of a woman and a young boy. The woman, on the right, has long brown hair and is wearing a grey and black patterned cardigan over a blue top. She is smiling slightly and looking towards the camera. The boy, on the left, is wearing a dark blue and white striped polo shirt and a grey long-sleeved shirt. He is holding a black pen and has his hand near his face, looking down at a book. The book is purple and has some text on it, including the name 'Jenny Holm' and 'Katherine Tegen'. The background is blurred, showing some green and purple colors.

CHAPTER 5

Assessing Authentically, Every Day

I have worked hard to reclaim my original concept of assessment and remember why I valued it in the first place. Teachers have power over formative assessments—the assessments that matter most to learning. When formative assessments are given along the way, they help teachers know what students need and also give students ideas on how to improve. They feed teachers and, more important, feed students so they can grow.

—Cris Tovani, *So What Do They Really Know?* (2011)

- Our class is studying theme and how readers infer themes throughout a text to determine the author’s purpose or message. We are teaching this concept in our interactive read-aloud and in our small-group sessions. Students are tracking themes in their notebooks and citing evidence to support their ideas. As we analyze our students’ notebooks, we notice that they seem to be confused about the concept of theme and how to determine the themes of a text. Many of the students are retelling what happens in the text but aren’t really focusing on theme. We decide to design a lesson that will give us some insight into why the students are struggling with this concept. We begin the lesson by sharing with the students what we are noticing about their understanding of theme. We ask them to turn and talk with a partner about theme and how they determine possible themes of a text. We listen in on the partner discussions and take notes on what we are hearing. We realize that many students are confusing the concepts of plot and theme. We pull the group back together and ask them to share their discussions. Ella shares what she discussed with her partner: “Theme is what happens in the story—you know, the big problem. We use prediction to help us figure out the theme or what is going to happen.” We do not want the students to be further confused, so we stop the sharing and begin an explicit lesson on the difference between plot and theme. ◀

Assessment cannot be separated from instruction. It is not an “add-on”; it is what we do every day as teachers. The cyclical process of triangulating—analyzing, questioning, and assessing—is embedded in instruction. It is simply how we teach. Some call it the “teachable moment”—the moment when a student says something that causes us to veer from our original teaching plan. What we hear or see from our

students causes us to pause, observe, assess, analyze, and adjust our instruction. Experiencing these teachable moments and seeing learning “click” for our readers is magical. That magic is why we teach, and assessment is an essential part of it.

The pedagogical beliefs that we “know to be true” define our understanding of the importance of assessing in the moment to inform our instructional decisions (see Chapter 2). These beliefs also tell us why it is essential that we use this information alongside formal data. We believe this pedagogy needs to be included in the bigger context of assessment in our profession:

- Piaget’s work taught us to create learning experiences so we can observe the behaviors of our students as they are learning. When we see how our students construct knowledge, we have a better understanding of how they learn.
- Vygotsky’s work showed us the importance of viewing *assessment* as not only what students can do well, but also what students need to learn. When we notice and analyze what our students do when they encounter difficulty in learning, it gives us a window into what they need to learn next.
- Peter Johnston’s work reminds us “that the most educationally significant assessment takes place in classrooms, moment to moment, among teachers and students” (1997, 7).
- Carol Ann Tomlinson’s research on differentiated instruction and the role assessment plays in meeting a wide range of learners’ needs is critical to why we assess in the moment.
- Pearson and Gallagher’s instructional framework within the gradual release of responsibility model provides opportunities to observe which skills and strategies students use when faced with a challenge and then use those observations to plan next steps in instruction.

It is Marie Clay’s work, however, that serves as our constant reminder of why we cannot lose sight of the critical need to assess as we teach:

Effective teaching calls for a third kind of assessment designed to record how the child works on tasks and to inform teaching as it occurs. Classroom teachers can observe students as they construct responses by moving among them while they work.

They can observe how individuals change over time by keeping good records. And they can allow children to take different learning paths to the same outcomes because they are clearly aware of the learning that is occurring. (Clay 1993, 4)

When we include our classroom data in the definition of assessment, we avoid the risk of making decisions based on one number. In this type of assessment, we are observing our students as they are learning, and instruction is embedded in the process of triangulating. We collect formative, informal, and qualitative data as we are teaching. Most of these data falls into two categories: observations or student work. Here are some examples of what we collect:

Observations

- conference notes
- small-group notes
- turn-and-talk notes
- engagement notes
- reading behavior notes—running records, inventories, time samplings, etc.

Student Work

- notebook entries
- logs
- surveys
- reflections
- informal tests/quizzes
- constructed responses
- projects

Now, theory gets us only so far in an elementary classroom. How do we put all our beliefs into practice? When we think about creating a community of readers—readers who are strategic, meta-cognitive, and independent—systems and structures are what come to mind. How can we set up a classroom culture that supports our need to observe and assess? How do we structure our schedule and design an environment to support the creation of learning experiences that give us opportunities to watch our readers in the process of learning? What types of note taking will be easy enough for us to follow through and do? How should we organize our notes so that we can find them and use them?

Structures

Structures are how we organize the time and space in our classroom to support assessing as we teach. We use a workshop model because it provides a structure in which students can work independently or with partners so we have time to assess and teach smaller groups. The workshop model reflects the gradual release of responsibility model of instruction and gives us time to watch our students as they learn in whole-class, small-group, and individual lessons. We believe it is essential to have each type of setting to observe and assess our readers because it helps us understand how they are transferring the strategies we are teaching them as they read.

Time is a precious resource in our classroom, and we never seem to have enough of it. The pressure to “fit it all in” sometimes causes us to lose sight of the importance of just hanging back and watching. Kathy Collins says in *Growing Readers*, “I like to watch and note how children approach and work on the same text. The way that children approach the book is important information to note because it tells us something about what they already know and think about reading” (2004, 94). We completely agree that we should do this, but we have to admit that there are times when we feel the pressure of time and jump right into teaching. We use a lesson structure that includes time to question and observe during the lesson. This has helped us have an assessment stance as we teach.

Lucy Calkins (2001) gave us the framework we needed to structure our lessons to include time to assess. In her framework of a conference—research, decide, teach—assessment and instruction are happening simultaneously and build off one another continually. To effectively use our instructional time with students as an opportunity to assess, we always keep that framework—research, decide, teach—in mind whether we are working with one student, a small group, or the whole class.

Our lesson structure (Figure 5.1) is designed to begin with a question or observation. We begin our lessons (whole-class, small-group or one-on-one) with an assessment stance by asking formative questions or observing to get an understanding of where students are in the learning process:

What are you working on right now in _____?
How’s it going with _____?

What have you been doing lately as a reader with _____?
 What have you learned about _____?
 How does learning about _____ help you as a reader?
 Where are the tricky parts?
 Show me (or your partner) where _____.
 Explain to your partner how you _____.
 Talk about how you figured out _____.

Figure 5.1
Lesson Planning
Form

We jot the questions we want to ask or the behaviors we want to observe before the lesson begins in the Pre-assessment box so that we remember to collect these data before we begin teaching.

Anchor Lesson:		
Pre-assessment		Notes to Build Next Lesson
Select the materials.		
Name the strategy. Explain. "I have noticed that ..." "A strategy readers use is ..."		
Demonstrate the strategy. Say: Think aloud. Show: Model. Explain: How this will help them as a reader.		
Provide guided practice. Invite the students to practice the strategy with teacher guidance.		
Provide independent practice. Remind students before they go off to reading workshop.		
Conference Points		
Share/Reinforce		

We collect assessment data during guided and independent practice. This is a time when we can gather important formative data. Asking questions helps us pinpoint specific places of confusion and makes our teaching points more precise. We also use turn-and-talk as a method to listen in on students' conversations and gather data.

Here we record possible questions to ask students during conferences. Listing a few possible questions or prompts ahead of time helps us focus the data we collect on the learning goal we are teaching.

We also take notes during the group share as students tell us what they learned about themselves as readers at the end of reading workshop. As students share, we listen in to find future teaching points for upcoming lessons.

These questions are typically linked to the instructional goals we have identified so that we can pre-assess how students are progressing with the content we are teaching. We need to know our goals and the essential concepts within those goals in order to know how we are assessing our students. Asking questions around the objectives we are teaching provides immediate feedback on what students know and what they need to learn next. It gives us the information we need so we can be more precise in our teaching.

Systems to Record Our Observations and Student Work

We want to use the ongoing, informal, formative assessments we collect to dig deeper and triangulate the more formal data we have about our readers. We find this difficult to do if we do not collect and organize our classroom data in a systematic way. We try to record what we are noticing systematically so we can use the information diagnostically in the process of triangulating—analyzing, questioning, assessing. When we are teaching, we take the time to document what we notice about the students in the moment so that we can use the information right away to focus our instruction.

Recording Our Observations

Following are some forms we use to help us take notes systematically.

Conferring Notes

What is most important about taking conferring notes is that they help us remember the teaching priorities for each student. Once we ask questions and watch a student in the process of learning, we analyze what we have observed and decide on instructional goals. The data we gather and the decisions we make need to be documented so we can use them to plan future whole-class, small-group, and individual lessons. We find it helpful when our conferring form has a place to record both our general observations and specific learning goals. We like to have boxes for both, because after we take notes, we take a moment to think about the next teaching priority for each student. Does the student need to continue working on his or her current goal

or is he or she ready to move on to a new teaching priority? When the form highlights the goals, it helps us quickly find the information we need when we are using our conferring notes to triangulate with other sources of data. Figures 4.8a and b are samples of completed conferring forms. A blank individual conferring form is available in the appendix.

Reading Behavior Notes

We use running records to systematically observe the skills and strategies our readers are using. (See Figure 3.3 for a sample.) Clay's running record is one of the observation surveys she designed to help teachers systematically observe students in the process of learning. Clay's book *An Observation Survey* (1993) focuses on several different types of assessments teachers can use with their students as they teach.

We use Clay's theory of systematically observing reading behaviors to design other types of inventories that focus on the specific behaviors we need to assess. Figure 5.2 is an example of a strategy inventory that we designed specifically for one student. We use this inventory to create a picture graph of the strategies we observe a reader actively using. Each time the reader uses the strategy, we note it on the picture graph.

Figure 5.2
Strategy
Inventory

Name: Hannah Date: May 25 Book: <i>Five Silly Fishermen</i> Level: G	
Strategy Inventory	
Read the picture	++
Chunk it	++++
Tap it out	+++++++
Skip it—What makes sense?	
Flip the vowel	++
Self-correct	++
Monitor—comments/flipping/laughing	+
Other	

This display works nicely because a student and a teacher can analyze the data together. A student can easily read the check marks and see which strategies he or she is using frequently and which ones he or she needs to use more regularly. We can see from the example in Figure 5.2 that this child relies on phonics to figure out unfamiliar words. In upcoming lessons we will teach her how to cross-check (use her phonics and the meaning of the text to solve unfamiliar words). Because we have only one check mark in the monitoring box, we will need to teach her to think about the text as she is reading. Here is what we might write in her conferring notes based on this picture graph:

Date/Title	Observation and Instruction Notes	Instructional Goals: Next Steps to Meet Goals
5/25 <i>Five Silly Fisherman</i>	<ul style="list-style-type: none"> • Tapping out—first strategy used • If tapping doesn't work, she looks for parts. • Not laughing 	<ul style="list-style-type: none"> • Skip it—What makes sense?

Small Group

We use the form in Figure 5.3 to document our goals for our small groups and the students' progression toward those goals. We want to make certain that our students have time to truly explore, practice, and integrate the strategies they are learning with the ones they have already learned. For this to happen, we use this form to hold ourselves accountable for giving our students extended time to focus on a few goals. For most of our students, we want to focus on the same instructional goals for the month in our whole-class, small-group, and individual lessons so students can truly experience the gradual release of responsibility. The notes we take in our small groups should inform our upcoming whole-class and small-group lessons for these students. For students whose developmental needs are different from most of the students in our class, we use small-group lessons to focus on their specific needs. The instructional goals of these lessons will most likely differ from the whole-class instructional goals, so we need to carefully document and communicate the students' progress with any other teachers who are providing them with instruction. A blank small-group form is available in the appendix.

Figure 5.3 Small-Group Instruction Form for Guided Practice

Names of Students	Instructional Goals ←	Frequency of Group ←
Hope Jake Lucy Bill Katie	1. Read, stop, and retell so you can remember. 2. Use structure of fiction to retell (character, setting, problem, solution). We use these boxes to record the instructional goals for each small group and to jot down observational notes during small-group instruction. These notes help inform subsequent small-group meetings with these students.	2 times per week We record the number of times the group will meet during the course of a week. Notice how Jack, Chase, and Ben's group will meet daily. These students are not meeting grade-level benchmarks, so we meet with them frequently and teach them the strategies they need to learn.
Dylan Becky Jason Brad	1. Read, stop, and retell so you can remember. 2. Use structure of fiction to retell (character, setting, problem, solution).	4 times per week
Jack Chase Ben	1. Look at the picture and the first letter. 2. Think about what makes sense.	Daily
Lisa Brenda Jen Gail Bekka Sam Daniel	1. Read, stop, and retell so you can remember. 2. Use structure of nonfiction to retell (topic/detail, chronological order, etc.).	3 times per week

➔ **Conferences**

Name(s)	Instructional Goal	Name(s)	Instructional Goal
Peter/David	Just Right Books		
Hannah/Lizzy	Work Independently		

Engagement Text Metacognition Reader Response

Not everyone in the class may be working in a small group during the course of a particular month. In this box we record the names of students who need specific reading conferences.

Peter and David understand retelling, but they are picking texts that are too long and difficult. We need to spend our time helping them select books that they can read easily.

Hannah and Lizzy are distracted during reading workshop. They need to learn strategies to help them stay focused on the text as they are reading. Since we are meeting with these students one-on-one or as partnerships, we record our notes on each student's individual conferring form.

Turn-and-Talk Notes

In our lesson design, we have incorporated opportunities to ask questions so that we can record our observations of what students know and what they need to learn. When we ask these questions, we often give the students a chance to turn and talk with a partner about them. When the students are talking, we listen in and write down information that will help us in the moment of that lesson and in upcoming lessons. We use the notes section on our lesson planning form (Figure 5.1) or a Messy Sheet (see Figure 4.9) to capture these notes. A blank lesson planning form and a blank Messy Sheet are available in the appendix.

Engagement Notes

When we teach, we always like to take a few seconds to hang back and watch what students are doing. We do this during independent, partner, and small-group work. We want to observe how students are engaging in their work. Are they focused? When do they get distracted? What do they do when they get distracted? How long can they remain engaged when working independently? We take notes by using the conferring notes forms of the students we are observing or a class list if we want to observe engagement from a broader perspective. Jennifer Serravallo has a wonderful inventory on assessing student engagement in her book *Teaching Reading in Small Groups*. She reminds us: “Without engagement during reading, this ‘time spent reading’ doesn’t count. As responsible reading teachers, it is important to be vigilant when it comes to our students’ engagement and to offer them strategies and techniques to help them stay motivated and engaged while reading” (2010, 20). Once we have some data, we involve the students in the analysis, the reflection, and the goal setting around any issues we are finding with engagement.

Nuts and Bolts of Housing, Taking, and Sharing Our Observational Notes

When it comes to note taking, the only thing we know for sure is that we find at least ten systems that do not work for us before we find one that does. There is no right or wrong way to organize notes. The most critical piece is that they are organized in a way that we can find them and use them to inform our instruction.

Systems for Housing Our Notes

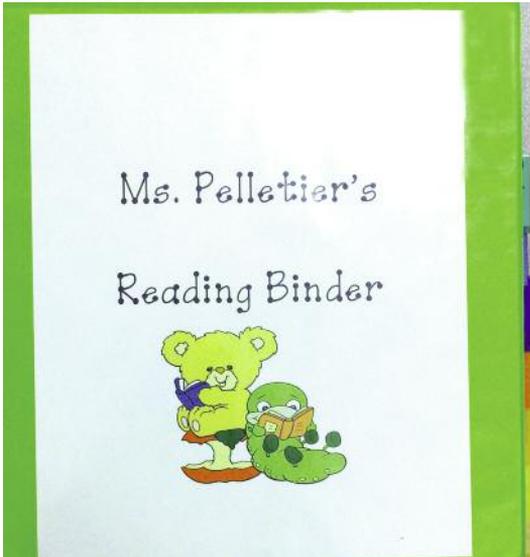


Figure 5.4
Reading Binder

Three-Ring Binder

We sometimes use a three-ring conference binder (Figure 5.4) to house our observational notes and important pieces of student work. We have a section for each student and fill each one with the student's most recent assessment information, several blank conferring sheets, and a clear pocket sleeve for work samples. We love having all of our notes in one three-ring binder. It is transportable to and from meetings, and everything stays in one place so we can easily access and triangulate a student's information when we are analyzing data.

Hanging File Folder Box

For those of us who don't like to carry around a binder, a hanging file folder box (Figure 5.5) can be effective. The file box is set up in a corner of the classroom that is easily accessible. Each student has a hanging file, and each file contains two manila folders: Folder 1 contains the fall and spring testing data (copy of the most recent Individualized Education Plan, the actual Fountas and Pinnell Benchmark Assessment/DRA/running records, results from the Observation Survey, DIBELS data, state test results, and so on). Folder 2 contains the conferring notes for that reader.

Figure 5.5
Hanging File
Folder Box



When we want to confer, we take the folders we need. This system works well when multiple teachers are recording notes on different students simultaneously. It is also easy to use this system when working with a small group. We can take the files of the students in the small

group, lay them out in front of each student, and then write notes as we work with each one individually.

Computer Spreadsheet

We have also tried converting from pencil-and-paper note taking to writing notes directly onto a laptop or iPad. In this system, we have separate file folders for each student right on the desktop or take notes in spreadsheet software, like Excel, so that they are easily accessible. We have our computers with us when we confer and pull small groups so that we can simply open a child's folder and enter our notes as we teach (see Figure 5.6).

Figure 5.6
Electronic
Conferring
Notes



Housing Small-Group Notes

One struggle we continue to face is figuring out how we can use our small-group notes to plan for the group's ongoing instruction and still document the progress of its individual students. We want to have our notes readily available as we teach so we can constantly revise our instructional goals to meet our students' needs, but we also want to have notes in individual files to document what each student is doing. *And* we want this to happen without having to write the notes twice

or photocopy everything. We have found that no matter which option we use, it can be difficult. Here are a few ideas we have tried:

Sticky Mailing Labels

Sometimes we prefer to take notes on individual students on mailing labels during small-group instruction. This way the notes can be easily transferred to the student's individual conferring notes and the small-group notes can remain intact.

Putting Individual Conferring Notes in Small-Group Folders

Tammy likes to put blank individual conferring notes for each student in the small-group folder. This way she can write notes on the appropriate conferring sheets for each student during the small-group lessons. The small-group notes remain together to inform instruction, and once she fills a conferring note, she files it in the student's conferring folder.

Systems for Taking Effective Notes

Taking conferring notes is a little like cooking a holiday meal for the first time. You do not know exactly what you will need, how much you will need, and what you will ultimately use. The first time Clare hosted Thanksgiving, she over-planned, over-bought, and over-provided. Now that she has done it a few times, she can pull it off and not have to eat leftovers for two weeks. When we first began taking conferring notes, it was the same way: we tried to write everything down because we did not know what we would need or how we would use the notes.

We take the time to get more efficient at taking notes. When we are given a new formal assessment to use, we take time to learn about it: what it is, what it assesses, how to administer it, and how to analyze it. We also devote time to learning how to focus our conferring notes on all areas of reading and how to document what we are noticing in a way that will allow us to use it efficiently and effectively. We use our instructional goals and student goals to help focus what we record in our notes. We take the time to reflect on our notes and determine the type of information that is most helpful to us and is essential to include.

We also use some shorthand tricks to decrease note-taking time. Clare writes in different colors for different purposes (for example, goals are always in blue ink) and uses shapes in her notes to help her identify what she needs to do: she circles things she needs to do, puts

lots of boxes next to each child's name. They use the boxes to write the date they met with the child in either a small-group or individual session. We love using this checksheet, because a quick glance tells us which students we need to meet in a small group and/or conference.

Systems for Sharing Our Notes

One of the biggest challenges we are facing with formative assessment is finding time to communicate about our struggling readers. To comply with the regulations of Response to Intervention (RTI), we are providing additional tiers of targeted instruction for our struggling readers. At times, three or four different teachers may be providing services to one student. Research indicates the need for “relentless consistency” around core goals and practices (Fullan 2011) for our students. Recently we have been noticing a pattern when we analyze ongoing, formative notes with our intervention teams: some students have as many as twelve different learning goals across four teachers and may be trying to learn as many as three different cueing systems to decode unfamiliar words. We need to bring more cohesion to the instructional goals and strategies for these students so that they can experience the gradual release of responsibility. If their goals are changing with each tier of instruction, they never get a chance for extended modeling, scaffolding, and practice.

It is ideal if all the teachers providing instruction for a struggling reader can share the notes they are taking on these common goals. We are trying to find some ways to do just that.

Recording Data from Student Work

Notebook Entries and Reflections

We analyze student notebook entries to gather information on how students are applying the strategies we are teaching. In grades two through five we often use reading notebooks to have students set goals, reflect on their goals, document their thinking, and write in response to their reading. We use these notebooks during our whole-class, small-group, and individual lessons to assess what students have learned and what they need to learn next. Aimee Buckner in *Notebook Connections* (2009) shares how she uses notebooks as a tool to assess for teaching in the now. “When I assess children in my classroom, it's based on their performance over a period of time. I use a preponder-

ance of evidence to determine their progress. This information, which is gathered on an ongoing basis, guides my teaching in the now. It shows me where kids are at present, where they were a few days or weeks ago, and what I need to do next to push them forward” (114). Using notebook entries and reflections as a tool to understand where students are in the process of learning helps us plan instruction to meet their needs and talk with them about the work they are doing to meet their goals. We record our observations in students’ individual conferring notes or in our small-group notes.

Figure 5.8 shows an entry from Kelly’s reading notebook. Kelly is recording possible themes as she reads each chapter, and recording the evidence from the book to support each one. Her work demonstrates her understanding of possible themes, and she is ready to learn how to connect them to determine the book’s major theme or the author’s message.

Figure 5.8
Kelly’s Notebook
Entry

Theme or Authors message	
chapter 1	- Friendship Evi. peggy and Maddy are friends waiting for wanda
chapter 2	- bullying Evi. The girls were teasing wanda about the dresses.
chapter 3,	popularity Evi. everybody is gathering around cecile admiring her new dress
↓	
chapter 3	teasing Evi. Girls were laughing when wanda said, "I have a hundred dresses?"
chapter 4,	stand up for others Evi. Maddy is wishing the bullying to stop but she's too afraid to talk to peggy
chapter 5,	Forgiveness Evi. Maddy and peggy are gonna go up to boger's heights and apologize.
chapter 6,	Forgiveness Evi. Maddy is looking for forgiveness with wanda but didn't find it.
chapter 7,	Friendship Evi. Wanda really wanted to be peggy and maddy's friend. All along in the letter and her drawings she showed it
The End!	

Here are our conferring notes after looking over Kelly's reading notebook.

Student Name: Kelly		
Goals: • Inferring the Theme		
Date/Title	Observation and Instruction Notes	Instructional Goals: Next Steps to Meet Goals
April 21 <i>Hundred Dresses</i> Notes on Theme	<ul style="list-style-type: none"> • She wrote possible themes for each chapter. • Does she know how to connect possible themes to determine the major themes of a text? 	<ul style="list-style-type: none"> • Determine the major themes of the text by connecting the possible themes.

Book Logs

We found that we used to have to remind students constantly to record their reading on their logs. These conversations pushed us to think about the purpose of the book log and why we use logs in our daily lives. Students need to understand why they are logging their reading and how it is going to help them as readers. If they do not understand the purpose of the log, they may view it as laborious or a waste of their time. To use the log effectively, we need to adjust it to meet the reader's needs and goals. Once we make this shift, we find students are not only recording, but also setting goals based on the data collected in their logs. When we look at logs with students, we can track their progress in reading, set goals, and celebrate their successes. Sometimes we photocopy sections of a book log and add it to a student's conferring folder or just add the essential data we need from the log to our conferring notes.

Open/Constructed Response

Many state tests include a text passage to which the student is asked to write an open or constructed response. There are clear expectations and rubrics for these responses. When we work with students as they

learn how to write this type of response, we often begin with a diagnostic assessment. We use student-constructed responses as diagnostic data to plan initial lessons and then continue to analyze writing samples to plan future lessons. We document what we notice about the students' responses in our conferring and small-group notes.

Voices from the Classroom

Gretchen Assesses in the Moment

Gretchen opens the whole-class lesson by saying, “Readers, we have been studying informational text and learning about how this genre is structured. Please turn and talk to your partner about what you are noticing about the features of this genre and how these features help you understand the text.”

Gretchen listens to the partnerships and jots on the Messy Sheet what she hears the students discussing. She notes that students can name the text features and accurately identify them in the text, but cannot articulate how they help them understand what they are reading. She also makes a note to remind herself to follow up on these concepts during small-group and whole-group lessons.

During a small-group lesson, Gretchen models how she uses the headings to help her quickly determine where she can find the information she is looking for. She asks the students to explain how they would use the headings to find information about a topic they were researching. Again, she jots down notes on her small-group form to document what students say and understand about using text features. She notices once again that students can identify the features but are unclear about how to use them strategically. This confirms her hunch from the whole-class lesson.

During a conference with Brian, Gretchen asks what he is working on as a reader. Brian begins to show his research notes to her. She notices that he is copying random sentences from the text that are not connected to his research topic. Gretchen probes by asking, “Show me how you used the text features to take notes on your research topic.” She then listens to Brian and documents in her conferring notes what he understands, what he is confused about, and what she is leaving him to work on as a reader. Brian is still confused about the features and is not accurately identifying those he has learned. What does Brian know about features? Is he using headings at all? Gretchen notes that she needs to continue to instruct Brian in how the genre of informational text is structured and how to use its features to find information.

Gretchen's focused questions and prompts during the whole-class, small-group, and individual lessons helps her identify important information about what to teach next to help her students continue to progress toward knowing how to use text structures and determining importance to understand text. ◀

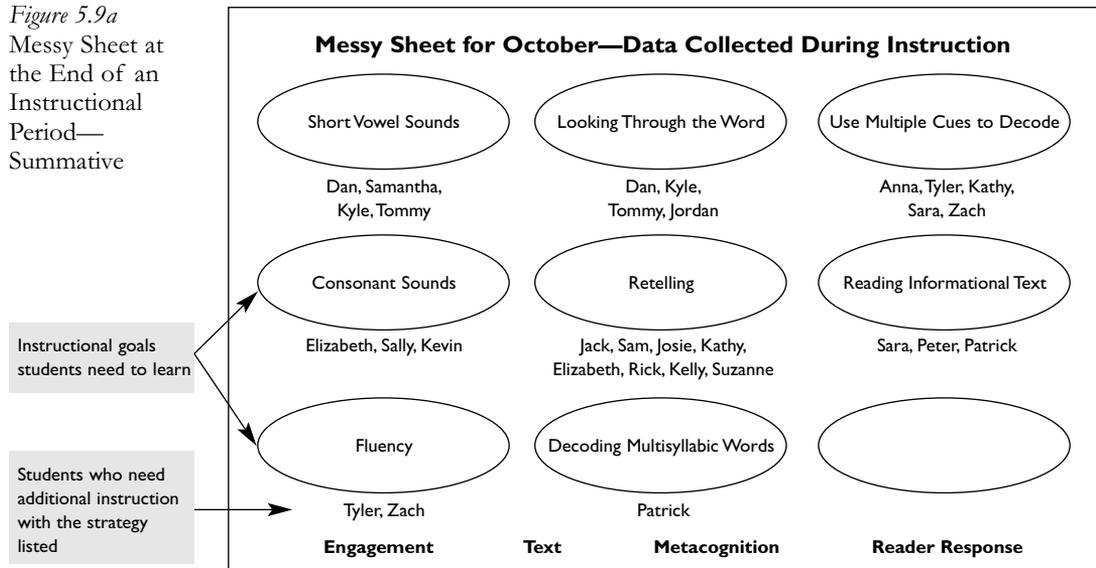
Using Displays to Highlight Patterns in Our Summative, Diagnostic, and Formative Data

In Chapter 4 we discuss how we use displays to help us organize our data on our class or on a particular student when we have several sources to analyze and interpret. This process is done at different times and for different purposes. When we want to reflect on what a student or class has learned from a phase of instruction, we look at the data we have available and create a display to help us see what they have learned. This highlights summative patterns and typically happens at the end of an instructional phase. This same display is often then used diagnostically to highlight what readers need to learn. This type of analysis is done outside the process of teaching. We usually do this analysis during a data meeting or a planning meeting. This is when we gather all our data and take the time to puzzle through it and plan for our next instructional phase.

We also use displays formatively in the process of teaching to organize the observational notes and student work we are collecting every day in our classrooms. We want to use our notes and student work to make timely adjustments to our teaching, but those notes can pile up. Taking the time to go through all our notes and work samples on a nightly or weekly basis can be too time consuming. We would rather go for a run, garden, or do almost anything than spend our evenings looking through a huge stack of classroom notes.

We use the Messy Sheet “on the go” to help us display the patterns we notice in our observations and student work. As we see a new learning need emerge, we not only record it in our conferring and small-group notes but also write the corresponding concept or strategy in one of the circles on the Messy Sheet. We then list the names of the students who need instruction on that strategy under the circles. This allows us to see the needs of the students in our classroom on one sheet of paper. We do not need to flip through each section of our

Figure 5.9a
Messy Sheet at
the End of an
Instructional
Period—
Summative



notebook and reread our conferring notes to plan our lessons. We have everything we need to inform our instruction on the Messy Sheet. If we need more specific data on a student or group of students, we refer to our conferring and small-group notes.

At the end of an instructional phase, we gather all the completed Messy Sheets and bring them to our data or planning meeting. We use them to reflect on the summative and diagnostic data they provide. These displays capture all the informal data for our class on one sheet so we can easily triangulate it with any formal, quantitative data we may have on our students as we plan for upcoming instruction.

For example, as we are teaching during the month of October we fill out the messy sheet in Figure 5.9a on the go. Each time we notice what a student needs to learn, we jot the concept in one of the circles and the student's name below the circle. This one sheet is a summary of our observations over the course of the month. At the end of October we look at these data with a summative perspective and we ask:

- What strategies did our students learn in October?
- What strategies do we need to teach in November?

As we look over this messy sheet, here are some of our observations:

- Since many students need to learn how to retell, we will teach this during whole-group and small-group lessons in November.

- We did not get to teach any fluency strategies in October, so we will teach a small group on fluency in November for the students who need those strategies.
- We notice that Patrick, Sara, and Peter need instruction on how to read informational text. We did not get to that in October. We have planned a nonfiction unit of study for December and will address those strategies then.
- Elizabeth, Sally, and Kevin now know more consonant sounds but still need reteaching of *Y, W, G, J*.
- Dan, Samatha, Kyle, and Tommy did learn their short vowel sounds this month.
- According to my conference notes, Dan and Kyle are looking through the word when figuring out an unfamiliar word, but Tommy and Jordan still need more practice.

Figure 5.9b is the messy sheet we created for the month of November. This messy sheet now gives us a diagnostic perspective because we used the data we gathered during the month of October and the curriculum to plan out our whole-class, small-group, and individual conferences for November.

Now that we have a plan for November, we create a messy sheet for collecting and recording data while we are teaching in November (Figure 5.9c). On this sheet we record some of the strategies we will be teaching so that we can add students' names as we observe them during the

Figure 5.9b
Messy Sheet at
the Beginning of
an Instructional
Period—
Diagnostic

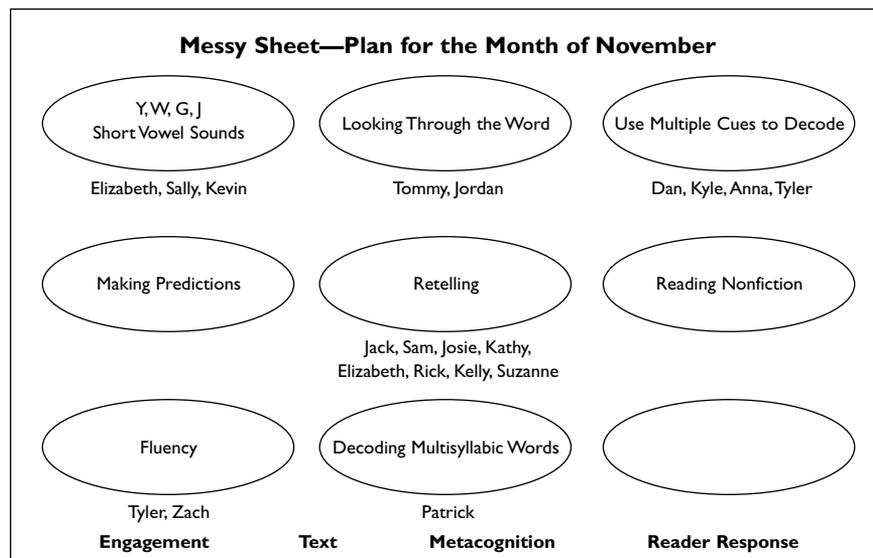
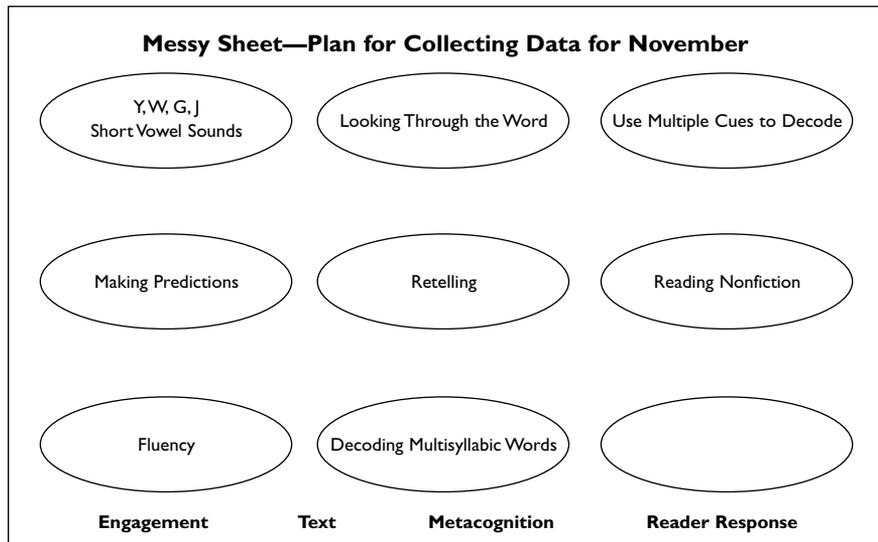


Figure 5.9c
Messy Sheet at
the Beginning of
an Instructional
Period—
Formative



course of the month. We will collect these data as we teach, which makes this messy sheet a formative assessment tool. We will use the information we collect during November to plan instruction for December. We continue this process each month so we can use our formative data to choose instructional goals. If we have formal data during any month, we triangulate these formative data with that formal data.

Classroom assessments are powerful in terms of understanding our students in the context of learning. We have made a commitment to bringing the process of triangulating into our instruction—authentically, every day. It is just what we do when we teach. This assessment stance in our teaching not only gives us the essential information we need in the moment but also engages our students in the process of learning. Daniel Pink’s research demonstrates that “the secret to high performance and satisfaction—at work, at school, and at home—is the deeply human need to direct our own lives, to learn and create new things, and to do better by ourselves and our world” (2011, 3). When we include instruction in our assessment process, students begin to have a role in assessment. Teaching is dynamic, and teachable moments are not something we can plan for. They are fleeting opportunities that must be sensed and seized by the teacher. When our students know we are listening, they begin engaging, and this creates a learning environment that provides opportunities to listen, reflect, and learn. When this happens, it is truly magical.

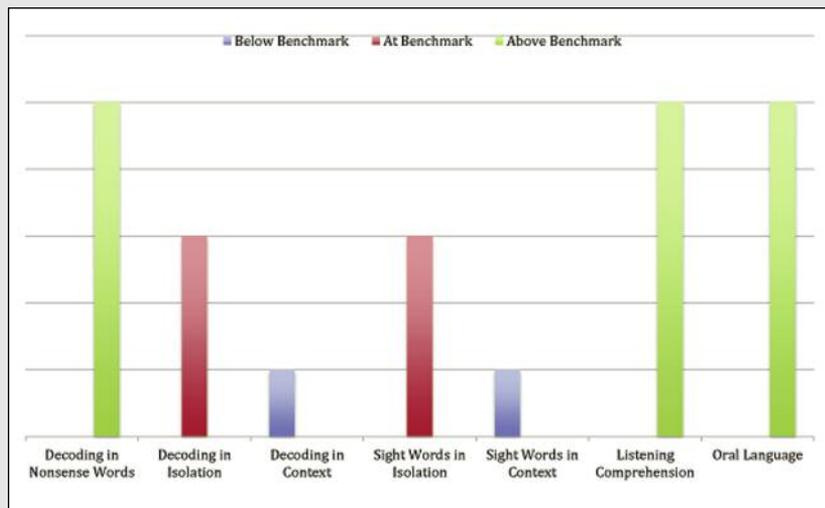
THE STORIES WE CARRY

Using Assessment to Adjust Our Teaching to the Student's Needs

Ana was a first grader. She began the year on benchmark on two different assessments—the DRA and the DIBELS Nonsense Word Fluency. In November she began intervention because of her lack of progress. In January she continued to meet or exceed benchmark on the DIBELS Nonsense Word Fluency, but showed no progress on the DRA (still an instructional Level 3). In March, she still did not demonstrate any progress on the DRA, despite having received extensive intervention over five months. Ana continued to receive the same intervention method several times a week across two tiers of instruction, but no changes were made to the instructional methodology even though she was not responding to the research-based intervention. By May of first grade Ana was still an instructional level 3 based on the DRA. While the team struggled and debated over Ana's diagnosis and how to “label” her difficulties with reading, one teacher, Deb, decided to look beyond the numbers and ask, “Why is Ana performing differently on different assessments?” and “What would happen if we instructed Ana differently?”

Deb triangulated Ana's reading data with her formal evaluation (Figure S5.1). Ana demonstrated strengths in listening comprehension and oral language. She also demonstrated above-average strengths in decoding nonsense words and words in isolation. “Why can she decode in isolation but not in context?” Deb wondered. All of Ana's

Figure S5.1
Using a
Display to
Triangulate
Ana's Formal
Reading Data



instruction up to this point had been on isolated skills and with controlled texts that did not reflect natural language patterns or an authentic narrative structure. Deb asked, “What if we used authentic text with Ana? What if we focused on some meaning strategies with her? What if our instruction focused on teaching her to use her strengths as well as develop her weaknesses?”

After two weeks of a different instructional approach, Ana began to demonstrate progress (Figure S5.2). After three weeks of instruction she was assessed using a running

Figure S5.2 Ana’s Conferring Notes, Week 1

CONFERRING NOTES		
Student Name: Ana		
Goals:		
<ul style="list-style-type: none"> • Preview the book—what is this book about? • Read the picture—what words might I find? 		
Date/Title	Observation and Instruction Notes	Instructional Goals: Next Steps to Meet Goals
4/29 Level B <i>At the Park</i>	<ul style="list-style-type: none"> • never looks at the picture • stops at difficulty and looks at me • shrugs • waits me out 	<ul style="list-style-type: none"> • teach strategy step by step • preview • look at picture • focus on why readers do this
4/30 Level C <i>I Play Soccer</i>	<ul style="list-style-type: none"> • looked at strategy card but did not use it • read the picture when prompted • previewed text after I modeled with yesterday’s book 	<ul style="list-style-type: none"> • see if she previews the text without prompting next session
5/4 Level C <i>Cold</i>	<ul style="list-style-type: none"> • previewed the text on her own • used strategy card on her own • nice job reading the pictures—taking time to look, think, and even “talk” through the pictures 	<ul style="list-style-type: none"> • model asking “Does that make sense?” • cross-check with the picture
5/6 Level D RR <i>A Special Day</i> 100% accuracy	<ul style="list-style-type: none"> • only using first letter as cue • really using the strategy card well • prompts herself • not looking at me 	<ul style="list-style-type: none"> • try transferring her “tap it out” skill strategically to text • add to strategy card • teach “skip it”
Engagement	Text	Metacognition
		Reader Response

record. Ana scored 95 percent accuracy with excellent comprehension at a Level E. When Deb analyzed the running record, she noted that when faced with a problem, Ana still resorted to visual strategies (Figure S5.3), but the decoding in authentic text did not match her scores in decoding nonsense words and words in isolation. Why would that be?

Figure S5.3 Ana's Fountas and Pinnell Benchmark Assessment System Results

The Letter Book • Level E • Fiction

Student: Ana Grade: _____ Date: _____

Teacher: _____ School: _____

Recording Form

Part One: Oral Reading

Score of 95%

Accuracy: Excellent

Source of Instructional Text

Page	Text	E	SC	M	S	V	M	S	V
2	Kate had a loose tooth. Here <u>fnis</u> ✓ Her tooth was very loose. Kate played with her tooth. But it did not come out.	2							
4	Do not ✓ "Don't play ✓ with your tooth," ✓ said Kate's mom. ✓ "Eat your breakfast." ✓ "I want my tooth ✓ to come out," ✓ said Kate.	1							
Subtotal		3							

The Letter Book • Level E • Fiction

Recording Form

Part One: Oral Reading

Score of 100%

Accuracy: Excellent

Source of Instructional Text

Page	Text	E	SC	M	S	V	M	S	V
5	"Your tooth ✓ will fall out," said Mom. ✓ Kate <u>wiggled</u> ✓ her tooth. ✓ But it did not fall out. ✓								
6	Kate brushed her <u>teeth</u> ✓ after breakfast. ✓ She <u>washed</u> ✓ her tooth ✓ to come out. ✓ She <u>wanted</u> ✓ it to come ✓ out. ✓	1							
7	She brushed and brushed. ✓ She brushed her <u>loose</u> ✓ tooth. ✓ But it did not fall out. ✓	1							
Subtotal		4							

Deb continued having Ana focus on meaning strategies for her first attempt, but then also chose a goal that had her using her decoding skills strategically in authentic texts. She focused on modeling how a reader uses those skills in the moment when reading. After a week of this instruction, this is what her reading looked like (see Figure S5.4). Ana had progressed four levels in five weeks.

After being stalled at the same level for almost a year, Ana had developed some ineffective strategies. When facing an unknown word, her first strategy was to look at the adult, then shrug, then rub her eyes, and then put her head down. Deb talked to Ana about what she was noticing about her behaviors when she faced a problem. She made a strategy bookmark for Ana so that she could cue herself what to do when she came to an unknown word. Deb used a strategy inventory to assess Ana's use of strategies unprompted and used it to focus her instruction (see Figure S5.5).

Figure S5.4 Ana's Conferring Notes, Weeks 2–3

CONFERRING NOTES		
Student Name: Ana		
Goals:		
<ul style="list-style-type: none"> • Skip it and see what makes sense. • Tap it out—flip the vowel. • Chunk it. 		
Date/Title	Observation and Instruction Notes	Instructional Goals: Next Steps to Meet Goals
5/7 Level E (RR) <i>Sister, Sister</i> 97% Accuracy	<ul style="list-style-type: none"> • excellent comprehension • laughing • talking to the book 	<ul style="list-style-type: none"> • confusion around what a vowel is • teach vowel names and sounds
5/11 Level E	<ul style="list-style-type: none"> • vowels—what are they? • skip it—modeled and tried together • using meaning well 	<ul style="list-style-type: none"> • vowels • skip it
5/12 Level E	<ul style="list-style-type: none"> • vowels • Skip it—she cross-checks much better when she skips it, but always needs to be prompted to do that. 	<ul style="list-style-type: none"> • skip it • vowels • tap it out on cross-check
5/14 Level E	<ul style="list-style-type: none"> • tapping it out nicely with nonverbal signal—not from strategy list • short vowels getting better • using skip it when prompted 	<ul style="list-style-type: none"> • cross-check—skip/tap
5/19 Level E	<ul style="list-style-type: none"> • tapping it out nicely with nonverbal signal—not from strategy list • short vowels getting better • using skip it when prompted 	<ul style="list-style-type: none"> • cross-check—skip/tap • long vowels
5/22 Level F (RR) <i>Car Wash</i> 94% Accuracy Excellent Comprehension		

Engagement Text Metacognition Reader Response

Figure S5.5 Ana's Strategy Inventory

Name: Ana Date: 5/25 Book: <i>Buzz Said the Bee</i> Level: F	
Strategy Inventory	
Read the picture	+++++
Chunk it	
Tap it out	+++++
Skip it—What makes sense?	++
Flip the vowel	
Self-correct	+++++
Monitor—comments/flipping/laughing	+++++
Other	

Ana's lack of progression over the year also affected her disposition as a reader. She did not view herself as a reader and could not name any books she liked. Deb decided to use these data to plan instruction to help Ana develop her identity as a reader. They explored different types of texts, set reading goals at home, discussed readers' habits, and added a reader response goal to her school goals.

After three months, Ana had progressed to instructional Level G and could name many books and series that she loved! She was still working on building a reading habit at home and viewing herself as "smart" and a "reader." Formal assessments continued to document that Ana had difficulty processing, retrieving information with automaticity, and sequencing sounds to decode in context. She continued to need and received intervention in these areas of weakness, but now she was doing that in a text level within the range of her grade level. Deb used assessment data to ask questions and dig deeper. She adjusted her instruction and watched how Ana responded, and then adjusted her instruction again. Assessment and instruction were happening simultaneously. Assessment was the tool that helped Deb design instruction to meet Ana's needs as a reader.