

Kathleen Dudden Rowlands

# Check It Out! Using Checklists to Support Student Learning

Kathleen Dudden Rowlands recommends using checklists to support student learning and performance. Well-designed checklists identify steps students can take to complete complex tasks, which scaffolds students' metacognitive development and fosters the confidence and independence needed for internalizing these steps for future tasks.

Everybody uses checklists. A Google search for *checklist* resulted in 9.9 million hits, offering checklists for wedding planning, baby proofing homes, flying planes, and remodeling bathrooms—not to mention a plethora of even more exotic applications. Many of us would never think of taking a long trip or going backpacking without using a checklist. And, according to a well-known December tune, even Santa uses a checklist to remember which houses to visit on Christmas Eve. With checklists a habitual part of my everyday life, I am chagrined to realize how slow I was to incorporate them into my collection of pedagogical tools.

There are sound reasons to employ checklists in classroom instruction. A number of authors have addressed their functionality. Kathleen Strickland and James Strickland, for example, value the flexibility of classroom checklists, suggesting that teachers can develop checklists to use with individual students or with the entire class (28–32). They point out that teachers can use them efficiently to record abilities students should display when confronted with particular tasks (28). Targeting checklists developed for teacher use, the Stricklands note that they can be formative—“used to record data during assessment”—or summative—“used to make evaluations, based on collected data” (29). That is to say, checklists are tools to capture and catalogue information about student performance and to inform instruction or provide evidence on which to base evaluation. Employed in these ways, checklists provide broad assessment tools for teachers.

Additionally, teachers can develop checklists for students to use themselves. The Stricklands suggest providing students with checklists to “catalog[ue] the items that should be included in a project or task” (28). Anne Ruggles Gere, Leila Christenbury, and Kelly Sassi recommend using checklists “to keep students on task” during peer-response sessions (57). In both cases, checklists serve as memory aids when students work through unfamiliar processes or complete complex tasks. As intuitively acceptable as such suggestions are, however, no theoretical work examining the value of checklists for teachers and students appears to have been done to date. Certainly this might provide a productive area of inquiry for interested teacher-researchers.

In this article, I will focus my discussion on checklists that support student learning and performance. Before going further, I should note that classroom checklists and rubrics are not, of course, the same, although they have common features. Both identify performance traits expected in student work. Both provide ways of making task requirements explicit for teachers and students. However, rubrics are scaled and descriptive, unpacking levels of performance for the purpose of assigning grades or scores; rubrics align descriptive performance criteria with grades or scores. Checklists, on the other hand, as I describe them here, make no attempt to identify descriptive criteria. They list the steps students should take as they are learning a process or highlight the features required for a completed assignment.

Used effectively, checklists can help students develop metacognitive awareness of their intellectual processes. Metacognitive research consistently suggests that students who know how to learn, know which strategies are most effective when faced with a problem or a task, and have accurate methods of assessing their progress are better learners than those who don't. By articulating and labeling operational steps, checklists scaffold students' metacognitive development. Designed by teachers, the checklists described below function to help learners develop confidence and independence as they internalize newly encountered operations and strategies.

### Operational Checklists Scaffold Student Learning

Donald H. Graves advises us that part of our job is to help students develop independence from "teacher welfare." That is, in addition to teaching Shakespeare and sentence combining, we should be helping students become independent readers, writers, speakers, and listeners. We need to teach so well that students no longer need help with what we have taught. Well-designed *operational checklists* are an effective tool to help us do that. Also known as

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*sequential* checklists (Scriven), these checklists unpack and organize the separate steps students should take to complete a particular task. After teacher instruction, students can refer to a checklist as often as needed as they expand their repertoire of independent reading and

writing strategies. I often create operational checklists for students to use as they develop independent control of new strategies for reading and writing.

The following examples of operational checklists provide reminders of steps in particular tasks and are useful when teaching students specific processes. For example, reading informational texts requires different analytical strategies than reading literary texts, yet my students often approach both in a similar fashion. After modeling several specific strategies and having students practice them as a class, I use the checklist in Figure 1 to support their independent practice, prompting them to be more reflective about the strategies they applied while

**FIGURE 1.** Strategies for Reading Informational Text

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- Did you remember to
- turn the title into a question to answer as you read?
  - note the original source and think about the publication's typical readers?
  - look for any information about the author and note his or her qualifications for writing on this topic?
  - survey the text by reviewing headings and any visual aids provided?
  - survey the text by reading the first few paragraphs (until you think you've reached the end of the introduction) and the final paragraph or two?
  - write a brief statement for yourself about the essay's topic and the author's attitude toward the topic (This essay is about\_\_\_\_\_, and the author seems to feel/think/believe \_\_\_\_\_ about the topic)?
- 

reminding them of others that might be useful. In this case, the checklist reminds students not only of different analytical tasks but suggests a productive sequence of operations as well. Students find that metacognitive awareness of their analytical processes enables them to transfer strategies from text to text. Taking their checklists into other classes, they are often surprised to realize that their newly developed reading strategies from English work in social studies and science, too.

After teaching students a process for responding to peer drafts based on a modification of Peter Elbow's response model from *Writing without Teachers*, I give them two checklists to refer to as they work through the process for the first time. One of the checklists (see fig. 2) reminds writers of the steps to take while sharing their writing and accepting responses from their group. Once again, the checklist is a mnemonic prompt for both the tasks and the order in which each task should be completed.

The next checklist (see fig. 3) scaffolds group responses. It reminds students that "good" is an insufficient response and that they should focus on their personal reactions to the piece without attempting to provide advice to the author—both key instructional points. By identifying the steps students need to take in their peer-response groups—both as the author and as the responder—

**FIGURE 2.** Checklist for Authors

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- Did you remember to
- read your piece slowly and clearly to your group (twice)?
  - put question marks next to parts responders wondered about?
  - put exclamation marks next to parts responders really liked?
  - ask responders questions you had about your writing?
  - take notes on responders' comments?
  - ask responders to clarify comments you didn't understand?
  - say "Thank you" when each responder finished commenting?
- 

these checklists give students specific things to do (such as "ask responders questions" and "tell the author a summary of the piece") and keep students focused on concrete, productive response procedures. Students receive clean copies of the checklists for each response session and use them as evidence when they write a sentence or two of self-evaluation about their performances as author and responder.

As students become more experienced, checklists target more complex tasks. An operational checklist reminding students in an advanced writing class of different cognitive moves they might

**FIGURE 3.** Checklist for Responders

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- Did you remember to
- listen *hard* as the author read?
  - make notes about things you liked and things that confused you?
  - tell the author a summary of the piece?
  - give the author a narrative of your responses to the reading?
  - identify things you liked and things that confused you?
  - ask the author to reread passages you didn't hear well?
  - answer the author's questions about the writing?
  - give the author your response notes?
- 

make while revising a draft could look like Figure 4. Once again, sequence is a subtext of this list, suggesting the global issues writers need to consider when revising (purpose, audience, content, organization) before attending to the specifics of the introduction and conclusion. A checklist such as this cannot teach students how to revise. A great deal of interactive instruction precedes any checklist of this complexity. The value of the checklist lies in its assembling core instructional concepts so that each item serves as a reminder to apprentice writers working toward final drafts. Because operational

**FIGURE 4.** Operational Checklist of Cognitive Moves for Revision

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Ask yourself . . .

**Purpose:** Have you defined the purpose of your writing? Are you trying to entertain? Explain? Describe? Analyze? Define? Persuade? Something else? Are the content and tone of your piece appropriate for your purpose?

**Audience:** Have you identified your intended reader(s)? Have you thought about the content of your piece (examples, details, quoted materials) in terms of how the reader is likely to respond?

**Content:** Have you reread each paragraph carefully, asking yourself, "What else does my reader need to know here?" and "Do I need to gather more information to fill in content gaps?"

**Organization:** Have you done a two- to three-word summary of the content of each paragraph? Does the content flow logically?

**Organization:** Is the organization of your piece as effective as possible? Do your examples build to the strongest at the end? Would it be more effective to begin your piece with your conclusion followed by support? Or would it be more effective to lead your readers through the story of your thinking so they will reach the conclusion the same way you did?

Is your introduction engaging? Should you begin with a quotation? A description? An anecdote? A shocking detail? Something else?

Does your conclusion do more than simply repeat or summarize what you have already said? Does it leave the reader with a fresh understanding and/or something more to think about?

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checklists such as these help students remember the different steps they need to take as they work through a new process, after several experiences with the same process students typically begin to internalize the steps and become capable of completing the required task independently of the checklist.

Sometimes I develop checklist bookmarks or postcards for students to keep as handy reminders of different strategies they have learned for reading or writing. These checklists are simply reminders to students

of what they have learned and the intellectual tools they have available when approaching a complex task. For example, I used an inexpensive graphic software package and a color printer to create bookmarks to help students apply specific writing strategies. The first bookmark lists various

invention heuristics, reminding students of optional strategies available if the first one they try is unproductive (see fig. 5). A similar bookmark reminds students

of “show, don’t tell” by listing strategies (descriptive detail, facts, statistics, anecdotes, direct quotations) to enliven their writing and becomes particularly helpful during revision. Similarly, a postcard I created lists a range of comprehension strategies we use when dealing with nonfiction texts (see fig. 6). Students appreciate the unusual physical forms as well as the colorful designs. Additionally, the convenience of these cardboard checklists encourages their ongoing use as reference tools.

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**A tangible reminder of how to approach a particular task, a checklist can help students internalize new processes in reading and writing, providing metacognitive cues that scaffold development of independent control of such processes.**

### Requirement Checklists Scaffold Organization

Probably we have all had students turn in extended projects—work they have spent days, if not weeks, completing—and then lose points because they fail to include a required part. Poor organizational skills, rather than a lack of conceptual understanding, prevent them from producing work that fully

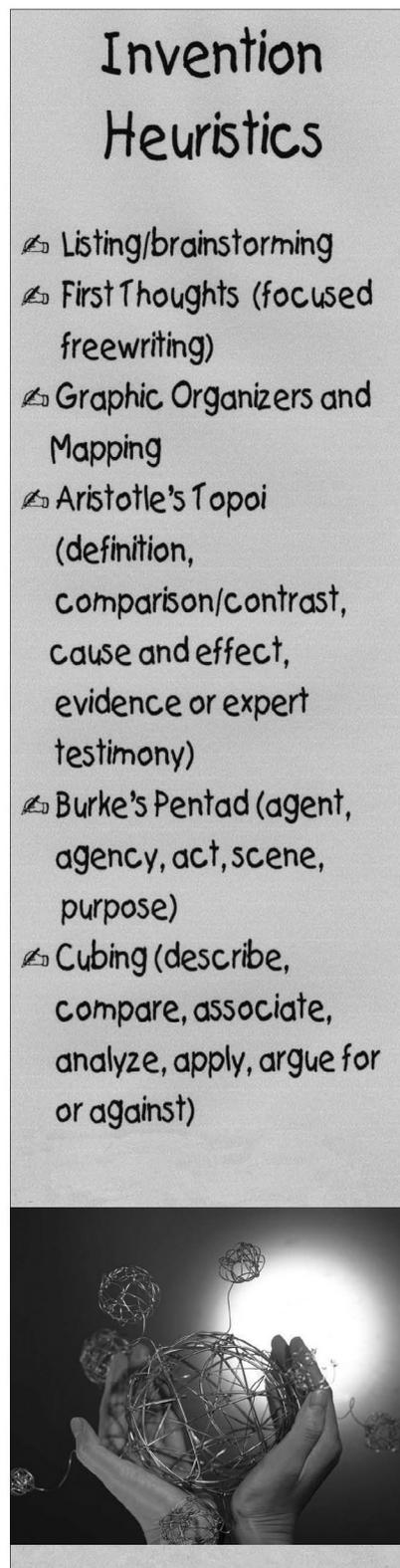
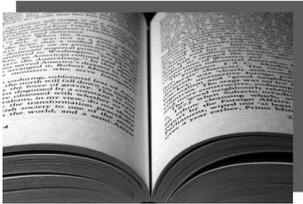


FIGURE 5. Invention Heuristics Bookmark

## READING STRATEGIES for Expository Texts



- ◆ **Bookmarks**
- ◆ **Chunking**
- ◆ **GIST**
- ◆ **Graphic Organizers**
- ◆ **Quickwrites**
- ◆ **Reciprocal Teaching**
- ◆ **Rereading**
- ◆ **Say, Mean, Matter/See, Mean, Matter**
- ◆ **SQP2RS** (surveying, questioning, predicting, reading, responding, summarizing)
- ◆ **Talking to the Text/ Annotating/ Highlighting**
- ◆ **Think Aloud**
- ◆ **Squeeze**



FIGURE 6. Reading Strategies Postcard

represents their capabilities, and we then find ourselves in the unhappy position of recording grades that measure lack of clerical competence rather than lack of content or skill knowledge. Helping students protect themselves from such missteps, requirement checklists might be thought of as providing *organizational scaffolding*, assisting students to manage the demands of increasingly complex academic tasks.

Teachers might develop requirement checklists to help students with a research paper or project. I once used the checklist in Figure 7 as a student self-check for a project focused on British Romantic poets. While the checklist primarily serves to catalogue required elements of the assignment, it also reinforces particular instructional emphases. For example, in addition to asking students to develop a background within which to approach Byron, Shelley, and Keats, I wanted to

reinforce the value of powerful titles and the conventions for presenting academic work, such as properly formatted citations and bibliography. In addition, as part of the project, I had introduced students to ways in which writers select and embed visual information into verbal texts, and I wanted them to experiment with doing so themselves.

Lists such as these make little attempt to address the *quality* of student work beyond supporting the organization and the inclusion of required components. Further, it is assumed that detailed instruction, such as how to choose and limit topics, how to identify useful sources, how to integrate quoted material, and so on, are addressed elsewhere. However, after one colleague experimented with having students look at a checklist before beginning work on their final draft, she wrote that “both the rubric and the checklist force[d] students to think more carefully about the

**FIGURE 7.** British Romantic Poetry Project

Did you include

- an interesting title (e.g., not “British Romantic Poetry Project”)?
- a table of contents?
- an introduction explaining why you chose your topic?
- three to five pages of typed text regarding your topic?
- citations from at least three sources (at least one nondigital) in MLA format?
- at least one image, chart, or map, labeled and referred to in your text?
- a bibliography in MLA format?
- a manila envelope containing all the rough materials that went into your final project: notes, Internet printouts, drafts, peer response notes, and so on?

criteria of a writing assignment” (Uliantzeff). This suggests that although checklists—used primarily as mnemonic devices of various sorts—are not explicitly designed as teaching tools, they have unintended instructional value as well.

### Checklists Support Teaching and Learning

Checklists are certainly not the only answer to improved student work. Still, operational and requirement checklists are useful enough to merit

serious consideration. A tangible reminder of how to approach a particular task, a checklist can help students internalize new processes in reading and writing, providing metacognitive cues that scaffold development of independent control of such processes. Furthermore, checklists help students track complex assignment requirements. Finally, checklists have many appealing features for teachers. They are easily constructed and wonderfully flexible. Operational and requirement checklists such as those described here are easily individualized to reflect the particular instructional contexts surrounding student work. Teachers can develop them quickly in response to specific curricular emphases in their classrooms. Checklists, in short, are useful management tools for both teachers and students. Check them out!

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#### READWRITETHINK CONNECTION

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Rowlands details numerous ways that checklists can enhance teaching and learning. One example she provides is using a checklist in a British Romantic poetry unit. “Put That on the List: Collaboratively Writing a Catalog Poem” also uses a checklist to help the students with the activity. Using the structure of the list, students combine creative expression with poetic techniques and language exploration to write group poems about what matters in their lives. The checklist helps students include all of the requirements and manage their group work. [http://www.readwritethink.org/lessons/lesson\\_view.asp?id=894](http://www.readwritethink.org/lessons/lesson_view.asp?id=894)