# SMARTER CHARTS



# Optimizing an Instructional Staple to Create INDEPENDENT READERS and WRITERS



# **ANATOMY OF A CHART**

What makes a smarter chart? Lots of things! Like a recipe that needs a pinch of sugar and a handful of flour, charts are composed of a few components that work together in harmony. Instructional charts may not be rocket science, but they use brain science to create high-impact aids for young readers and writers.

#### Chart Heading

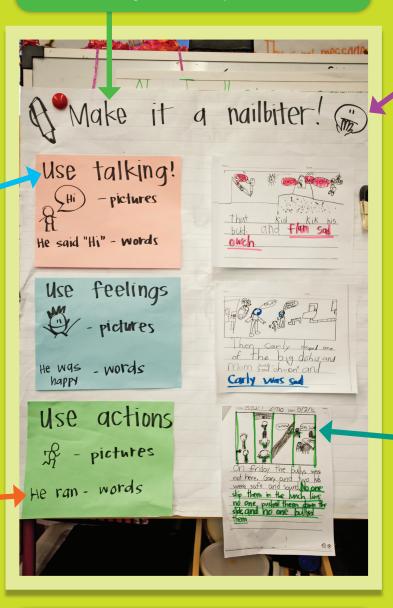
Headings are the advertisement for your chart. Written large and legibly, they invite readers and writers in, name a big skill, and set your students up to utilize the rest of the chart. They grab attention with a strong statement or a question.

#### Content

Charts take abstract content and represent it in a concrete way to support independence. This chart about writing helps students elaborate their stories using talking, feelings, and action. It reflects instruction by stating explicit strategies or showing the process of how to do something.

#### Language

The language on your chart reflects the reading level and language competency of the students you teach. Make it like a billboard; don't write a lot when a little gets the point across to your readers and writers. The words on the chart should be easily read and understood by the majority of your students.



#### Drawing

Simple line drawings and sketches communicate vast amounts of information to young readers and writers. When used in tandem with a few wisely chosen words, pictures support high-level thinking, define new concepts and words, and provide additional information. And don't worry, we have a whole section on how to draw! Drawings make the chart engaging and enhance meaning. Photographs and clip art can also be used effectively.

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#### **Student Art**

The best teachers are often in your classroom the students and the work they create! There is nothing more engaging to students than seeing their work celebrated and elevated as a mentor for others. Placing student exemplars and examples reinforces expectations and provides models that are within the zone of proximal development of the other students in the classroom.

#### **Materials**

Like any artist, a chart maker benefits from tools of the trade: chart paper and markers. But there is more! A restickable glue stick and colored copy paper can change charts from wall hangings to living things. Color-coding using colored paper, sticky notes, and markers helps make each strategy clear and distinct, which aids memory.

# **A FIELD GUIDE TO LITERACY CHARTS**





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# SMARTER CHARTS

# Optimizing an Instructional Staple to Create INDEPENDENT READERS and WRITERS

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Dedications Mr

for my husband, Tom, who keeps me nourished both body and soul.

8 Marjorie Martinelli

For Geoff-The best person I know. V-K.

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# Introduction

ou should write a book on charts," we have heard many teachers say while pulling out cell phones to photograph the sample charts used to supplement a workshop on reading or writing. The star of the show has repeatedly been the charts themselves—charts that were created to help children understand the many concepts and strategies being taught during a reading or writing workshop. The surprising thing about this is that charts are something most teachers make. Most teachers know about charts. Most teachers have made hundreds of charts. Most teachers hang charts from every available space in the classroom. Why then did all these teachers want our charts? What was new or different about our charts? Weren't we like every other teacher who simply had made hundreds of charts during her professional career and felt that charts were a necessary part of teaching?

But then we started to think, "What *if* we wrote a book about charts?" We had presented several workshops on creating charts. We had worked with teachers across the country on developing clear and effective charts. But still, one question kept nagging us: What did we have to say about charts that might be new or useful or interesting? It didn't help our confidence when we went online and found there were more than ten million Internet sites on charts. Millions of teachers making charts. Millions of companies selling charts. Millions of charts out there in the world. As we traveled from classroom to classroom and website to website, we saw that many of the charts found had to do with rules, regulations, and organization. Charts often "tell" children what to do, rather than "show" children how and why to do something. Whether teacher-created or commercially prepared, charts are everywhere and a way of life in the classroom. So began our search to find out why.

Kristine still remembers that first visit to the teachers' store, days before teaching her first classroom of second graders. She pored over the chart displays: There were seating charts, attendance charts, behavior charts, incentive charts, reward charts, chore charts, fact charts, flowcharts, KWL (What do I **know**? What do I **want** to know? What did I **learn**?) charts, anchor charts, vocabulary charts, pie charts, Lexile charts, behavior modification charts, and on and on. "What will I need? What will my kids need?" she thought. As she walked out with a cart full of charts, she began to wonder, "Have I put the chart before the horse?" At the end of that first year as Kristine packed up one dusty, unused chart after another, she realized that the chart can't come before the child.

Once Kristine moved away from her unused, pricey store-bought charts, she started making charts to support the actual instruction happening in the

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classroom. Being a perfectionist, she would make the charts at home and put them up as needed, sometimes making a chart for the whole month of instruction and hanging it on the first day of a unit. This practice stopped in its tracks with the realization that the students were no more likely to look at those handmade charts than the commercially created ones purchased at the teacher store. They might have been cheaper, but they took a lot of time to make. This realization led her to phase 3 in her chart-making evolution: actually involving the students in the creation of the charts, as well as teaching children to interact with the charts within the classroom environment.

Involving children in the developing and evolving classroom environment is not a new idea. When Loris Malaguzzi first began to develop the Italian preschools now known globally as Reggio Emilia, he placed a major emphasis on the classroom environment. He called the environment "the third educator," along with the teachers and the parents, and believed that "in order to act as an educator for the child, the environment has to be flexible: it must undergo frequent modification by the children and the teachers in order to remain up-to-date and responsive to their needs to be protagonists in constructing their knowledge" (Gandini 1998, 177). We have visited many classrooms over many years where teachers have created such responsive environments by making charts that are current and clear. We have learned much from these teachers about the use and purpose of classroom charts, which you will see evidence of across these pages. Consider this book a consciousness-raising effort aimed to elevate charts to a level of necessitynot just because we teachers are told to, but because we have found them to be incredibly helpful tools, full of information, and truly the third teacher in the room.

Once, when Marjorie was a second-grade teacher, a new student, Sandy, arrived in her room late into the fall. She sat him with Alyssa, another student in her classroom, during writing workshop, knowing Alyssa would look after him. As Marjorie scrambled to find another chair, another folder, another math book, she noticed out of the corner of her eye Alyssa leading Sandy by the hand, giving him a tour of each and every writing chart in the room. As they neared the "Starting a New Book?" chart, Marjorie edged a little closer to catch Alyssa saying, "When you get your paper you have to [insert the tune of '(Shake, Shake, Shake) Shake Your Booty' by KC and the Sunshine Band here] Think, think, think! Sketch, sketch, sketch! Write your story!" Sandy looked a little mystified at



the impromptu performance and said, "Write a story about what?" Alyssa smiled knowingly, and said, "Oh, the chart for *that* is over here!" As she pointed toward the "Need an Idea?" chart, Marjorie began to understand that both Alyssa and the chart had become "third teachers" in the room.

## Our Beliefs About Teaching and Learning

Though this book has principles and techniques that cross over subject areas, its heart lies with the big ideas of reading and writing workshop as developed by Donald Murray, Donald Graves, and Lucy Calkins. Woven throughout the work of these giants of education is an emphasis on independence, choice, and a celebration of the process of reading and writing. Children read and write daily and are taught the work of reading and writing. As Lucy Calkins says in the *Art of Teaching Writing* (1994), our job is to "teach the writer, not the writing." You don't need to be teaching with reading and writing workshop to use the ideas in this book for making great charts. It is our hope that no matter what teaching framework you, the chart maker, use, you'll learn the skills and strategies necessary to create tools that maximize student independence, encourage choice, and celebrate the problem-solving process along the way.

Think about the charts in this book as mentor texts. We learned from Frank Smith in his groundbreaking book, *Joining the Literacy Club* (1983), to "read like a writer in order to learn how to write like a writer." Similarly, read the charts that follow as a writer of charts by paying attention to structure, details, word choice, style, and sentence structure. And remember, the chart you look at might be on ways to generate writing topics, but instead of focusing on the content of the chart, think about the process, the craft, the purpose, and then think how you could transfer these same ideas to any chart, in any subject. Craft can be imitated and learned, whether you are left-brained or right-brained. Most importantly, we hope you become as enchanted with charts as we have become.

# Charting Our Course: The Questions That Guide Our Process

Whether you love them or find them a burden, charts are an expected norm in most classrooms today. Charts are often an indication of



the quality of instruction happening in each classroom and have even become a standard part of the evaluative process. Administrative checklists often include charts among the categories listed and many administrators want to see them everywhere, for every subject. Ideally, these charts support children and are responsive to their needs. But what kinds of charts? How many charts? Where to display charts? How much print should be on charts? How long should charts remain on display? Can the same charts be used year after year? Such questions lead to two possible scenarios: an absence of charts, or, like in many classrooms, such a proliferation of charts that the only way to continue hanging them involves standing on a desk and using a yardstick to perch the chart on the highest reaches of the wall, a problem sometimes called "print pollution," or too much of a good thing. What is a teacher to do?

These questions led us to do some research, which quickly pointed us toward multiple paths: brain research, design theory, and principles of learning. But these multiple paths also kept intersecting and overlapping. Cognitive and educational psychologist Jerome Bruner stated forty years ago that "we easily become overwhelmed by complexity and clutter" (Bruner 1971, 4). Almost twenty years later, Edward R. Tufte, a key figure in the world of analytical and visual design, declared that "clutter and confusion are failures of design, not attributes of information" (Tufte 1990, 51). And just the other day, we watched a first grader report back to her teacher that she could not locate the word said on the word wall because, with arms splayed widely apart, "there's like a million S words up there!" Both the work in classrooms and the research in these fields have brought us to a few big ideas.

## Advertisers Know What They Are Doing

The other day, Kristine walked with her niece past a Subway restaurant. Almost simultaneously they broke into "Five . . . five-dollar foot-looooooong!" Looking over at her niece, Kristine was almost jealous, thinking, "Why can't I get that kind of recall in the classroom?!" As she told this story, we started talking about what the advertising world knows about making things stick that we could learn from and use in the classroom. We thought that there must be reasons some charts seem to be more effective than others, just like some advertisements catch your attention and stick with you whether you want them to or not.



To find some possible answers, we turned to the areas that make it their business to understand what makes something memorable: the world of art, advertising, and commercial design.

The commercial world has mastered the art of communicating large amounts of information and ideas with a few words and a few images. Perception, usability, and appeal are key components considered by advertisers and designers alike to get their messages across and to make a lasting impact on their targeted audiences. There is a wonderful reference book on design, Universal Principles of Design (2010) by William Lidwell, Jill Butler, and Kritina Holden, which presents 125 design principles that explain why humans respond the way they do to the visual, audible forms of communication that compel us to attend to some products more than others and makes this design knowledge available to all. Many design qualities we all know intuitively, for example, "A picture is worth a thousand words." But how much more powerful to learn that researchers refer to the power of pictures as the "picture superiority effect" and have found that recall is enhanced beyond that of words alone, especially when exposure time is limited and the pictures are clearly recognizable.

For example, one resourceful teacher, Kathy Soto, found it far quicker to transition her children to their reading spots by simply flashing a picture of a book, rather than repeating the same oral directions day after day. Or that highlighting and bolding are effective attention-getting devices if used sparingly, no more than 10 percent of the visible design (Lidwell et al. 2010). Just think back to your college days when many of you probably highlighted entire paragraphs or pages only to find when studying for an exam you were forced to reread entire sections because you didn't know what was actually important in that highlighted paragraph. And how about "exposure effect," which has shown that repeated exposure leads to familiarity and acceptance (Lidwell et al. 2010). It is hard to imagine, for example, that the Eiffel Tower or the Guggenheim Museum has ever been reviled, but it took years of exposure before they became accepted and revered as cultural landmarks by the general public. Or even to remember now how foreign the multiplication table looked when we first laid eyes on this now familiar tool.

Edward Tufte takes great pleasure in pointing out how words, numbers, and images have aided in understanding complex ideas for thousands of years. In his visually stunning book *Beautiful* 





*Evidence* (2006), he states that "evidence that bears on questions of any complexity typically involves multiple forms of discourse" (83). He proceeds to show by example how such intellectual luminaries as Galileo, Dürer, and da Vinci used high percentages of images along with words, numbers, and diagrams to explain the stars, measurement, and anatomy in ways that are compelling and memorable. What an exquisite thought that we could lift up the lowly school chart and lay it alongside the works of such great teachers in our efforts to help our students understand important information simply by using a high percentage of images, words, numbers, and diagrams.

A few other principles of design long considered important when it comes to ads or charts include readability, legibility, constancy, clarity, balance, consistency, icons, patterns, comparison, color, and accessibility. Classroom charts that use these same principles as the commercial world also receive the same benefits. Alternatively, we mustn't forget that the world of advertising also uses these tools to convert and colonize, rather than inspire deeper understandings and independence. We chose to subvert these tools for the greater purpose of educating and empowering students.

# It's All in Your Head: Charts May Not Be Rocket Science, But They Are Brain Science

But why do things like pictures and limited bolding make a difference? Why does Kristine's niece remember the five-dollar foot-long song, yet fail to remember the value of a quarter? Why, also, can Kristine never remember the zip code of her mom's house, yet at a moment's notice sing "Two whole beef patties, special sauce, lettuce, cheese, pickles, onion on a sesame bun" all with complicated hand gestures? It all comes down to the brain.

Research into how the brain functions has led to increased understandings and many explanations for the various ways children respond to the instruction teachers present and offers answers to the many questions teachers have concerning the diversity of children who cross our paths each year. Knowing what stimulates the brain to attend and remember information is critical to understanding why some charts help and others are ignored. Such



familiar things as prior knowledge and engagement can make the difference between what information is used and what is forgotten.

One thing that aids memory first and foremost is perception. Perception is often thought of as what we see with our eyes, but it actually includes all the senses: sight, sound, smell, taste, and touch. You sense you are near the ocean when you hear seagulls squawking, smell a salty seaweed odor, and feel sandy grit under your feet, long before you actually set eyes upon the aqua shoreline. But prior knowledge also comes into play; if you had never been to the ocean before, never experienced the sound of seagulls, never smelled seaweed, never felt sand under your feet, you might not have made such an accurate perception. New information combined with stored information contributes to our understanding of each situation we experience. Using familiar representations on charts, like an eye or a mouth, can help in creating meaning for the new information we are trying to help children remember. And as Howard Gardner reminds us, "It is essential to portray the topic in a number of ways to call in a range of intelligences, skills and interests" (1999, 176).

Another important aspect of memory is attention. A familiar lament often heard from teachers is, "Samantha never pays attention to anything I say." Patricia Wolfe in her helpful book on translating brain research into classroom practice, Brain Matters (2001), suggests that novelty, intensity, and movement are effective stimuli that can increase attention, which helps explain why children who are engaged and motivated remember more. The teacher who dons Groucho Marx glasses just prior to a lesson on punctuation rules definitely gets her students' attention. Raising the volume of Mozart's Fifth Symphony at the end of writing workshop will definitely get students' attention. Flashing the overhead lights on and off also works to get attention. You are probably nodding your head in acknowledgment and thinking, "Yep, those things work for me." Unfortunately, Wolfe adds a major caveat: Novelty, intensity, and movement are only effective for a short time. Once any one of these conditions is used often enough to become habit, the effectiveness becomes mute, unless it also contains some emotionally relevant response or vivid memory imprinted on our brains. For example, role-plays, simulations, guest speakers, and field trips bring experiences to life and aid in memory by combining experience, emotion, and actions. You can incorporate these memorable elements into the charts you make and use them in your classrooms to keep the charts refreshed and memorable.

# Visual Literacy: A Picture Really *Is* Worth a Thousand Words But Is Faster to Read

Much has been written in current professional literature about what is termed "visual literacy." Visual literacy is the ability to access information that is presented in such forms as pictures, diagrams, maps, charts, symbols, and signs. It is in the world around us, in the print media, and in the electronic media. No matter where in the world you travel, for example, not only can you find a restroom, but you can distinguish the men's room from the women's room by the graphic representations that symbolize a man and a woman. In print media and electronic media, we are deluged with information presented in the form of graphs, diagrams, signs, maps, images, and icons. They can be still and stable, like the red and white Target logo, as well as rapidly moving and changing, like the Target television commercials. In addition, with constant repetition they have become a source of automatic recall for many complex concepts. This is the only world our students have known.

There is a reason for the proliferation of visuals in a highly literate world. Visuals increase any student's capacity to remember information. Although smell may be the strongest memory, no one has yet invented the scratch and sniff chart (although this may be closer than we think). Visual memory is the second strongest, and one that we can use. When information is presented only in spoken form, 10 percent is recalled after seventy-two hours. Add visuals and 65 percent is recalled in that same time period (Medina 2008). It is a form of presenting information in the classroom that teachers need to grab hold of and use in order to stay current and effective. As you consider what to put on a chart, know the importance of visuals to capture people's attention. Icons and symbols are particularly effective because they can become universal in our schools, just like the bathroom symbols are universal in airports across the world.



# Above All, Charts Engage and Lead Students Toward Independence

Using all of the elements we've described thus far results in beautiful, eye-catching, accessible charts, but it doesn't provide the whole answer to what makes charts a necessary tool in every



classroom. When so many professionals make use of a tool, you have to think there must be some very good reasons for its use. Why do teachers use charts with such abandon in every classroom? Why have they become second nature and an expected artifact of our teaching? It might be because, above all, charts teach children to be independent problem solvers, and is there anything more important than that? As Peter Johnston explains in *Choice Words* (2004) when he talks of children having agency and a can-do attitude, "Children should leave school with a sense that if they act, and act strategically, they can accomplish their goals" (29). Charts are meant to aid in solving typical problems that often arise. In other words, the chart is for those who can do—using a chart is a can-do action!

Of course, this is easier said than done. Helping children understand we are here to help, not hinder, their learning is an idea that needs to be made public and cried out loud and clear to the students in front of us. Although this may seem obvious, just ask Cynthia Hernandez, a second-grade teacher in New York City. She was conferring with Maria, who was writing a book on shoes, and wanted to prompt her to use the chart on ways to elaborate an information book. When she suggested Maria look to the chart for some ways to teach more about her subject, Maria took one quick look at the chart and then turned back to Cynthia with a surprised look on her face. "It's like you're giving us all the answers!" she exclaimed. In actuality, Cynthia was working more like the search engine Google in this instance, providing links for Maria to follow so she could help herself.

As you move away from store-bought charts and begin making charts that support the instruction in your classroom, or as you seek to make your own classroom charts more powerful, you might find yourself frustrated in a variety of ways. When will you make the charts? Where will they hang? What will go on them? What if nobody uses them? Breathe deep and know we have been there. We have also learned that you don't need to be perfect, just thoughtful.

Marjorie began by trying to make charts perfectly as she taught—"perfectly" being the issue that made this system break down. She simply could not write and illustrate fast enough to keep pace. Children would ask things like, "What does that say?" and when looking at her quick drawing of a book, "Why did you put a house on the chart?" It was frustrating, but ultimately, challenge can be the best teacher! She found a few solutions that worked,

but more importantly through this process she discovered what mattered more was that children were engaged in the process of making the chart, making it more memorable from its birth. She started to see children go back to the charts and talk about them to each other. "It's on the chart," one child would say to another, as Marjorie would nearly fall over in shock.

No matter what, children need to be active participants in the making of the chart. The coauthorship invests children and allows for the chart to be seen as belonging to them, just as much as you. A chart does not just appear; it is born through the hard work of both teacher and students, and that gives it life in the classroom. The charts we share with you in this book and the techniques and stories we provide came from this classroom life and from the classrooms we have worked in over the years.

## A Field Guide to the Charts in This Book

There are a variety of charts contained within the covers of this book. The different types of charts serve different purposes in classrooms. You do not need to have one of each type, and you may find that you make one type much more frequently and another hardly at all. The "Types of Charts" table will aid you in identifying types, in understanding a bit about the purpose, and in creating your own charts (also see Appendix A). We have labeled the types of charts as they appear in the book.

As we lead you through an examination of the qualities of good charting, you'll see the different types of charts represented in the table. We chose to organize our charts (and our book) based on the qualities of good charting because we aim to teach the *thinking* that leads to successful chart making regardless of artistic or any other creative talents. We wanted to isolate elements of successful charts and present them in a way that would help readers replicate the qualities of successful charts, rather than the content. The charts in this book are designed to be accessible to various grade levels and developmental needs. As you read forward, take a deep breath and plunge in. Far more important than perfection is the thinking that goes into the charts, and ultimately, the independence and agency strong charts will encourage in your students.



Type of Chart	Purpose	Notes	Example (see front cover flap)
Routine	Teaches a routine or behavior to students	<ul> <li>Often numbered</li> <li>Written like a how-to</li> <li>Includes photographs of students in action</li> <li>Most often made at the beginning of the year</li> </ul>	<b>Fig. A.</b> "How to Set Up for Writers' Workshop" chart
Strategy	Records a list of strategies for a big skill	<ul> <li>Not numbered</li> <li>Students self-select the strategy that matches what they need to do</li> <li>Grows over multiple lessons</li> </ul>	Fig. B. A strategy chart
Process	Breaks a big skill into a sequence of steps	<ul> <li>Can be numbered or sometimes represented in a circle</li> <li>Students need to do each of the steps to complete the process</li> <li>Usually taught in one lesson</li> </ul>	<b>Fig. C.</b> "Writers Plan Our Stories" chart
Exemplar	Shows specific strategies or skills in context	<ul> <li>Usually a shared or interactive writing piece</li> <li>Teacher annotates where a certain skill is with a big sticky note or note in the margin</li> </ul>	<b>Fig. D.</b> Joshua's piece of writing has been annotated by the teacher in order to use it as an exemplar.
Genre	Teaches students the elements of a specific genre	<ul> <li>Usually built collaboratively with students after studying some sample of the genre</li> <li>Grows over multiple lessons</li> </ul>	<b>Fig. E.</b> "Fiction Stories Have" chart

#### A Field Guide to Literacy Charts

Charts can be categorized in several ways.

## Directions for the Reader

In the Table of Contents you can see that the book is organized into three main sections, each focused on one important aspect of smarter chart creation and use. Each section begins with a large, overarching question, then lists several specific questions teachers frequently ask about charts, and then presents various techniques that will clarify these common gueries. Within each main section, you'll find a "Charts in Action" feature. These features provide a window into real, live charting classrooms. We'll share transcripts of interactions between teachers and children as teachers help children use charts in a variety of ways, using a variety of teaching methods, both in whole-class situations and with small, targeted groups. We'll pull out specific charting tips alongside these transcripts. Photographs of actual charts help illustrate each section.

The focus of Section 1: "What Do I Put on My Charts?" is on the language, vocabulary, and visuals that make charts accessible and memorable to children based on age and developmental stages. Here you will find suggestions for coming up with clear and catchy headings, considerations for determining the amount of print to use on a chart, choosing vocabulary that has the biggest impact, and the types of visuals that will support these messages.

In Section 2: "How Can I Help My Students Use the Charts Independently?" we acknowledge the realities of limited time and limited space and will help you find some possible solutions to these age-old dilemmas most teachers face. In addition, we share some fun ways to make charts memorable by using music, chants, and rhymes. And we also show how we can use charts to help children make connections between reading and writing.

And last, but not least, Section 1: "How Do I Assess the Success of My Charts?" dives into the deep waters of assessment by considering self-assessment. This includes tips for helping children self-assess themselves and their work using the charts in the classroom. We also show how teachers can self-assess using those same charts by considering effectiveness and relevancy, then making decisions about which charts to revise and which charts to retire. This brings us back to the concepts brought up in Section 1 concerning clarity, in Section 2 regarding realities, and now in Section 3 assessing effectiveness.

