PRESENTER NOTES
USING CHECKLISTS

This guide offers suggestions for presenting ***Ongoing Child Assessment: Using Checklists.*** This in-service suite includes a PowerPoint presentation and supporting materials. Please use and adapt these materials as needed for specific audiences.

MATERIALS NEEDED:

- PowerPoint presentation (21 slides)
- Projector and audio equipment
- Learning Activities
  - » *Skill Sequences for Checklists*
  - » *Using Tally Sheets as Checklists*
  - » *Communicating with Families*
  - » *Classroom Scenario*
- Tips for Teachers
- Tools for Teachers
  - » *Classroom Activity Assessment Checklist*
  - » *Skill Assessment Checklist*
- Tools for Supervisors
  - » *Helping Teachers Use Checklists*
- Helpful Resources
- Flip chart or similar large paper, and markers for writing participant ideas

BEFORE YOU BEGIN:

- The purpose of this presentation is to help participants learn practical and simple ways to use checklists to collect information on child progress.
- This is one in a series of in-service suites about ongoing child assessment.
- Checklists, along with anecdotal records, work samples, and video, are one way to collect information on child progress. The in-service suites on these assessment methods can be used alone or in combination to provide professional development regarding ongoing child assessment.
- Learning activities include practice activities as well as checklists for teachers to use in their own classrooms.
- Consider bringing in different examples of checklists to share with participants.
- Suggestions of potential follow-up activities for participants are provided at the end of this document.

NOTE

These documents provide support and additional documentation for the ideas in this presentation:

Bredekamp, S. (2011). *Effective practices in early childhood education.* (Chapter 11, pp. 343–344, 345–347, 348, 350–352). Upper Saddle River, NJ: Pearson Education.

Dichtelmiller, M. L. (2011). *The power of assessment: Transforming teaching and learning.* (Chapters 5, 6, and 10). Washington, DC: Teaching Strategies.

McAfee, O., & Leong, D. J. (2011). *Assessing and guiding young children's development and learning* (5th ed.). (Chapters 4, pp. 49–52, 63–69; 5, pp. 73–76; 6, pp. 100–101; 7; and 9). Upper Saddle River, NJ: Pearson Education.

SLIDE 1:
ONGOING CHILD ASSESSMENT: USING CHECKLISTS

Introductions:

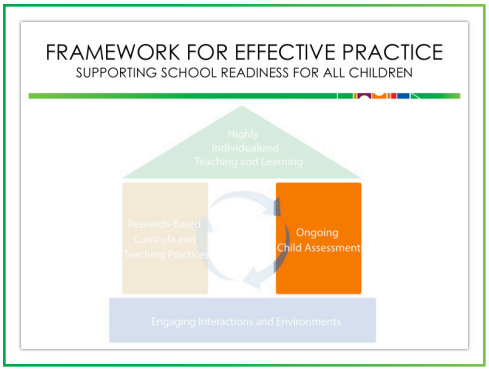
- Begin the training by giving participants background information on yourself.
- Provide an opportunity for participants to introduce themselves.
- Conduct an icebreaker activity to promote participation.

Examples:

- Ask participants to share their definition of ongoing assessment.
- Ask participants to name one strategy they use to collect information about children's progress in their classroom.
- Ask participants to describe a checklist they are currently using.

Introduce the topic.

This presentation is about using checklists as a way to collect information on child progress. Documenting information on child progress can help teachers become more effective.



SLIDE 2:
NCQTL'S FRAMEWORK FOR EFFECTIVE EVERYDAY PRACTICE

Introduce NCQTL.

The four components of the House Framework support school readiness for all children:

- The foundation represents effective and engaging interactions and environments.
- The pillars represent research-based curricula and teaching practices, and ongoing child assessment.
- The roof represents highly individualized teaching and learning.
- All four components interact with each other and are essential to effective practices.

This in-service suite is part of the *Ongoing Child Assessment* pillar of the House. It focuses on how teachers can use checklists as one of the ways to collect assessment information. Assessment information helps teachers evaluate kindergarten readiness and effective teaching practices.

NOTE

Remind participants that any record of child progress (including video, work samples, and photographs) must be treated consistently with their program's record-keeping policies, especially in regards to ensuring appropriate confidentiality of information.

EMPHASIZE

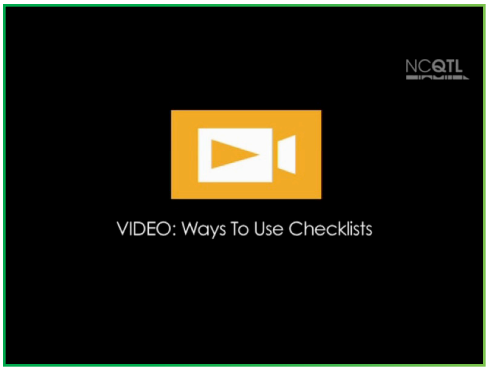
Children aren't automatically learning just because they're present in a program.

SLIDE 3:
OBJECTIVES

The children in your Head Start classroom have to learn many things in order to be ready for kindergarten. How do you know they're learning what they need to know? By observing them during everyday activities in your classroom. Ongoing child assessment is necessary to understand children's progress and is important to quality teaching and learning.

In this presentation we will discuss:

- How to create your own useful checklists.
- How to interpret and use checklist information.



Length of video: Approximately 3 minutes and 40 seconds

SLIDE 4:
VIDEO: WAYS TO USE CHECKLISTS

Introduce the video.

This video shows checklists being used in the classroom and on the playground.

Ask participants to think about the following questions as they watch the video:

- Why do the teachers use checklists to document progress?
- How do they decide what to include in the checklist?
- How do they make it easier to organize their checklists?

VIDEO

DISCUSSION

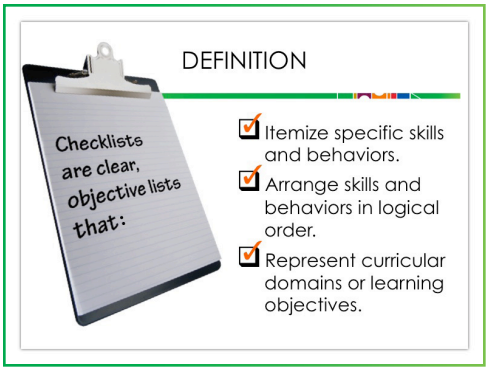
Ask participants to share their comments and answers to the above questions.

Points to highlight from the video:

- Checklists can be used **for different purposes** (to assess general levels of performance, gather data on specific skills, address a concern about an individual child, etc.).
- Checklists can be used **to plan lessons and adjust teaching**.
- Checklists can be used **across a variety of activities** (art area, outdoor play, table top games, etc.).
- Checklists can be used to record behaviors **across multiple domains** (physical development and health—such as gross motor skills, language, mathematics, etc.).
- Checklists **can be customized** to fit different activities and situations.

EMPHASIZE

Checklists are a practical and efficient way to collect information on a specific skill or set of skills.



EMPHASIZE

Checklists should be clear, objective, and represent curricular goals.

SLIDE 5: DEFINITION

Checklists used for ongoing child assessment are clear, objective lists that:

- **Itemize** specific skills and behaviors.
- **Arrange** specific skills and behaviors in a logical order.
- **Represent** curricular domains or learning objectives.

DISCUSSION

Refer participants to the video from the previous slide.

Ask for examples of child skills or behaviors where teachers might use a checklist to collect information (for example, tricycle safety).

Next, ask participants to list the specific skills involved and arrange them in a logical order.

- For tricycle safety, specific skills might include pedaling, turning, stopping, and not going too fast.

Finally, ask what curricular domain the skills represent.

- Tricycle safety skills represent gross motor skills, which are part of the Physical Development & Health domain of the Head Start Child Development and Early Learning Framework.

EMPHASIZE *

Checklists help teachers focus on key aspects of a child's performance.

SLIDE 6:
THE BASICS: CHECKLISTS

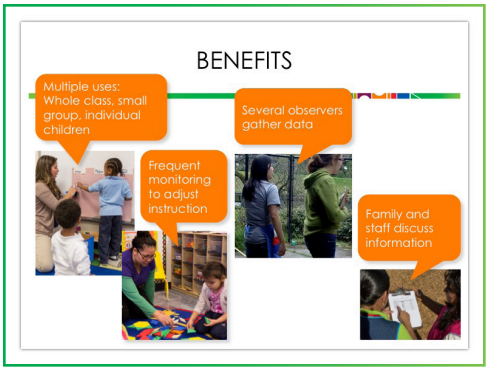
Checklists are a practical method to quickly and efficiently observe, collect, and document children's behavior.

Checklists can help teachers **monitor a child's progress**:

- Teachers can determine a child's current level of performance.
  - » What is his skill development for specific domains?
  - » How do her skills compare with those of other children in the classroom?
- Answers to these questions can help teachers decide what to teach next.
- Checklists can help teachers monitor change over time for specific learning objectives.
- Checklists can record behaviors over time for one child or a select group of children.

Checklists can also help **guide instruction decisions** on:

- Lesson planning for the entire class and small groups of children.
- The amount of instruction needed (for example, more time on language development with a specific group of children).
- Whether to add more challenging opportunities for select groups of children.
- Whether to alter the pace of instruction to match children's learning.



EMPHASIZE

Checklists can be used by multiple people to collect information on a classroom, group, and individual level, in order to adjust instruction.

SLIDE 7: BENEFITS

Checklists offer many benefits for teachers.

Checklists can be used in multiple ways and across different activities to monitor progress of:

- An entire class of children toward common goals
- Small groups of children working on specific skills
- Individual children

Frequent monitoring allows teachers to adjust instruction:

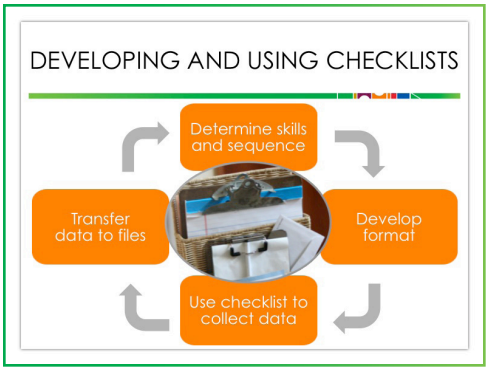
- Checklists can make it easier for teachers to frequently monitor children who are demonstrating challenges in certain areas; teachers can then decide how to adjust instruction.
  - » For example, a teacher may be interested in frequently monitoring the progress of children who will be entering kindergarten the following school year and are demonstrating weaknesses with letter naming. If a child's progress is not adequate, the teacher may want to increase instructional time on letter naming or provide additional supports.

Several observers can gather data:

- Teachers, teacher assistants, and other adults can use the same checklist to gather information.
- Checklists provide clear and objective descriptions of behaviors, so different observers can record accurate information on the same skills.

Family and staff can discuss the information recorded on the checklists:

- The observations can facilitate conversations between family and staff about a child's progress.



SLIDE 8:
DEVELOPING AND USING CHECKLISTS

Teachers can develop checklists that fit the specific circumstances of their classroom.

Before you create a checklist:

Determine the specific skills you want to record.

Arrange them in a logical teaching sequence.

Develop a format for the checklist.

Decide how to organize:

- By activity
- By skills
- By children

Determine the data recording points:

- Use a separate form each time
- Use the same form with multiple data collection points

Choose a recording method:

- Checkmarks
- Yes/No
- Specific notation
- Predefined categories
- Ratings

Select an implementation method:

- A sheet of paper on a clipboard
- A small notebook to be kept in a pocket
- Cards on a key ring
- Other ideas

Use the checklist to collect data.

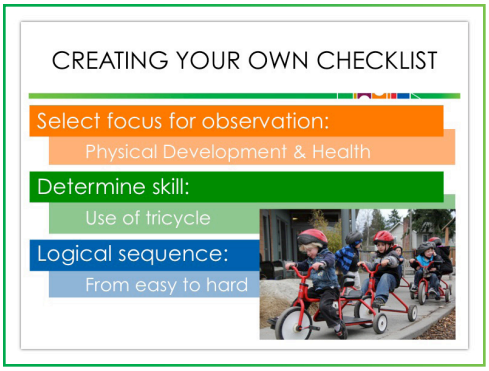
Data can be collected:

- On multiple children or an individual child
- During small group or large group activities
- On an ongoing basis:
  - » Weekly
  - » Biweekly
  - » Monthly

Transfer data to files.

Checklist data can be transfered to:

- File system used in agency or program
- Portfolios
- Electronic files



SLIDE 9:
CREATING YOUR OWN CHECKLIST

The first step in creating your own checklist is to **select the focus** of your observation.

Next, **decide which specific skill or set of skills** you want to collect data on. It's especially useful to break down a broader skill into smaller steps or related skills when you are monitoring children's progress along a continuum and are planning instruction.

Skills or smaller steps can be **logically sequenced** from easy to hard.

- For example, skills can be sequenced according to *increasing quantities* (of items, distance, time, people, locations), or by levels or types of support.
  - » A teacher may want to gather information on how far children are able to ride a tricycle around an oval track: half-way around, around the entire track, or around the track several times.
  - » A teacher may want to monitor the length of time a child engages in cooperative play by setting a series of increasingly longer participation times from 5, to 10, and then up to 15 minutes.
  - » A teacher may want to monitor a child's progress from riding a tricycle with an adult's support to gradually needing less assistance and being able to pedal independently.
- Sets of related skills can be sequenced from *simple to more complex*.
  - » A skill like riding a tricycle involves a sequence of steps such as learning to pedal, learning to turn, and learning to stop.
  - » Writing skills typically progress from simple scribbles, to letter-like forms, to using conventional letters.
  - » To observe children's progress in retelling a story from a book, a teacher may want to break this complex skill down into individual components—beginning with describing what's happening in a picture, to retelling what happened early in the story, to predicting what might happen next.

EMPHASIZE

Break down a skill into smaller steps based on difficulty, support needed, or the different components of the task.

NOTE

For more information on breaking goals down into smaller steps, refer to the in-service suite *Break it Down: Turning Goals into Everyday Teaching Opportunities.*

LEARNING ACTIVITY:
SKILL SEQUENCES FOR CHECKLISTS

In this activity, participants choose a skill or activity that can be monitored with a checklist, and identify a logical sequence of teaching steps.

Divide the large group into smaller groups.

HANDOUT

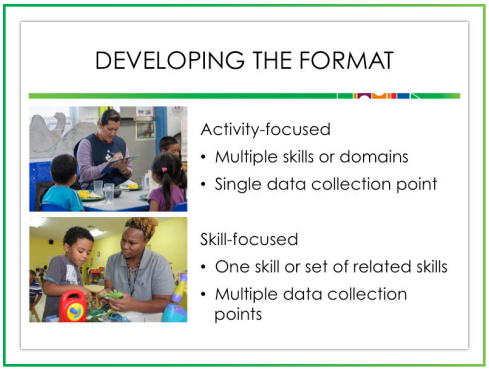
Distribute the *Skill Sequences for Checklists* learning activity and review directions.

DISCUSSION

Bring the small groups back together for a large group discussion. Have participants share main points from their small group discussion.

Points to highlight:

- The activity should be one that the child engages in frequently.
- Be sure to organize skills in sequential order, including how hard the task was, how much support was needed, and the steps needed to complete the skill.



SLIDE 10:
DEVELOPING THE FORMAT

Some considerations to take into account when developing a checklist format are:

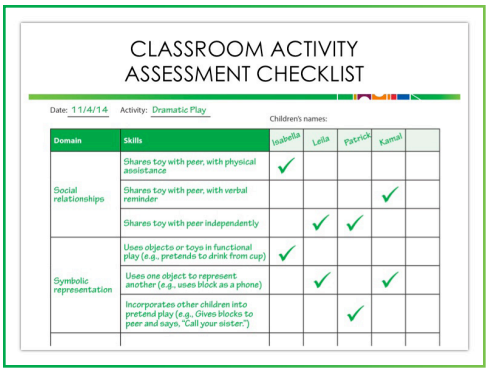
- What is the breadth of the checklist?
  - » **One specific skill or multiple skills** across different domains
- When and where will data be collected?
  - » **One specific activity or across different activities and settings**
- How many data collection points are included?
  - » **One or multiple data points** per checklist

Teachers need the most practical and efficient approach for their needs:

- It may be more efficient to collect data on multiple skills within a single activity (**activity-focused**).
- Or, it may be more practical to gather information on one set of skills across multiple activities (**skill-focused**).
- A separate form can be used at each data collection time or a form could be designed to incorporate observations at multiple points in time.

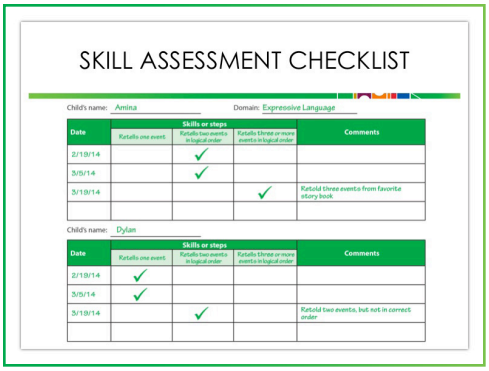
DISCUSSION

Have participants discuss the advantages and challenges of different checklist formats.



SLIDE 11:
CLASSROOM ACTIVITY ASSESSMENT CHECKLIST

Teachers designed this checklist so they could document the knowledge and skills of several children in multiple domains during a single classroom activity. In this example, the teacher collected information on children's social and symbolic representation skills during dramatic play.

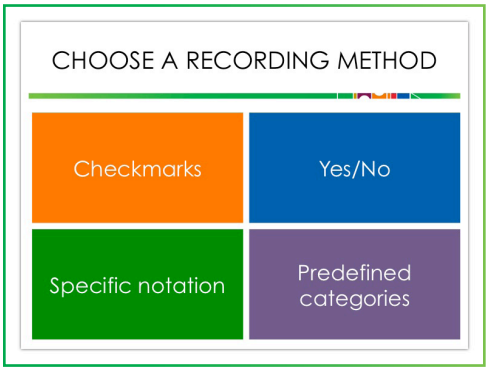


SLIDE 12:
SKILL ASSESSMENT CHECKLIST

Teachers designed this checklist so they could document multiple children's progress in a single domain over a period of time. In this example, the teacher collected information, over three data points in time, that charted multiple children's progress at retelling a story.

NOTE

An example version and a blank version of the two checklists shown on Slides 11 and 12 are available in the *Tools for Teachers* handout.



SLIDE 13:
CHOOSE A RECORDING METHOD

Data can be recorded in a variety of ways, including:

- Checkmarks
- Yes/No
- Specific notation (e.g., letters named)
- Predefined categories (e.g., colors, shapes, sizes, amount, duration, location)

The two checklist examples we just saw used checkmarks to record the presence or absence of a behavior.

EXAMPLE: GROSS MOTOR SKILLS CHECKLIST

Child's name:	Week of:	Throwing a ball	Catching a ball	Kicking a ball
Charlie	3/18/2014	Yes	Yes	No
Santiago	3/18/2014	No	No	No
Kashia	3/18/2014	Yes	No	No
Jon	3/18/2014	Yes	Yes	Yes
Lily	3/18/2014	No	No	No
Will	3/18/2014	Yes	Yes	No

SLIDE 14: EXAMPLE: GROSS MOTOR SKILLS CHECKLIST

This checklist uses a Yes/No recording method and was created to monitor child progress on gross motor skill development.

- The teacher monitors the children's progress once every two weeks.
- The teacher is specifically interested in evaluating whether or not the children are able to *throw a ball, catch a ball,* or *kick a ball*.
- These skills fall under the Physical Development & Health domain from the Head Start Child Development and Early Learning Framework.

To summarize the data:

- Based on what is shown here, most of the children have mastered throwing a ball, but are not yet able to kick a ball. Charlie, Jon, and Will are also able to consistently catch a ball. Santiago and Lily are still working on learning to throw a ball. Jon is demonstrating progress not only with throwing and catching a ball, but also in kicking a ball.
- Therefore the teacher continues to provide learning opportunities and monitor the children's progress until she is able to consistently check "Yes" for throwing, catching, and kicking a ball.

DISCUSSION

This discussion may be conducted after describing the checklist and prior to summarizing the data.

Encourage participants to interpret the data and provide suggestions for adjusting instruction.

- Based on the data shown here, what do you know about the children's skills?
- What are some potential next steps?

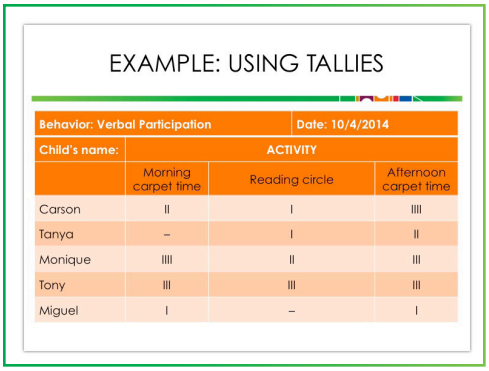
Record answers, if desired.

Possible examples of next steps:

The teacher could continue to provide learning opportunities:

- Make sure balls are available during outdoor play.
- Set up opportunities for children to practice ball skills in the gym or outdoors.

Monitor the children's progress until the teacher is able to consistently check "Yes."



EXAMPLE: USING TALLIES

Behavior: Verbal Participation		Date: 10/4/2014	
Child's name:	ACTIVITY		
	Morning carpet time	Reading circle	Afternoon carpet time
Carson	II	I	IIII
Tanya	–	I	II
Monique	IIII	II	III
Tony	III	III	III
Miguel	I	–	I

SLIDE 15:
EXAMPLE: USING TALLIES

Here's another example of how a checklist can be used to monitor child progress in the classroom. Tallies are used to count how many times a behavior or event occurs. This checklist is designed to record the occurrence of children's verbal participation.

The teacher uses tallies to record five children's verbal participation during three different activities throughout the day.

This is an easy checklist to use because it has space to record tallies and the teacher can write in the children's names ahead of time.

DISCUSSION

This discussion may be conducted in a large or small group, after the checklist is described and before the group summarizes the data.

Encourage participants to interpret the data and provide suggestions for adjusting instruction.

- Based on the data shown here, what do you know about the children's verbal participation in classroom activities during the day?
- What are some potential next steps?

Record answers, if desired.

Possible responses:

The children vary in their frequency of verbal participation. Most children tend to talk more during carpet time than during reading circle.

The teacher may consider providing more opportunities for children to talk during reading circle. She may also want to monitor Tanya and Miguel's verbal participation more closely to better understand possible reasons for their low participation across activities and to provide additional support as needed.

LEARNING ACTIVITY:
USING TALLY SHEETS AS CHECKLISTS

In this activity, participants look at examples of tallies used in checklists and discuss how tallies could help them monitor progress and inform teaching in their own programs.

Divide the large group into smaller groups.

HANDOUT

Distribute *Using Tally Sheets as Checklists* learning activity and review directions.

DISCUSSION

Bring the small groups back together for a large group discussion.

Ask participants to share ideas on how using tallies can be helpful in monitoring children's progress.

Points to highlight:

- Tallies are used to count how many times a behavior or event occurs.
- Tallies can also be used to keep track of how many times a behavior or event occurs during a specific time interval.
- This type of checklist can be used to monitor the progress of individuals, small groups, or entire classrooms.

EXAMPLE: RATING SCALE

Child's name: Cameron	Date: 2/19/14	Domain: Mathematics Knowledge & Skills – Patterns	
	Always	Sometimes	Never
1. Sorts objects by color	✓		
2. Sorts objects by shape		✓	
3. Sorts objects by size	✓		
4. Places objects in order from smallest to largest		✓	
5. Recognizes simple patterns	✓		
6. Extends simple patterns		✓	
7. Creates simple patterns			✓

SLIDE 16:
EXAMPLE: RATING SCALE

This final example is designed to measure a child's classification skills. Notice the child's name and the skills are written on the checklist.

Classification skills are part of patterns, which fall under the Mathematics Knowledge & Skills domain from the Head Start Child Development and Early Learning Framework.

With this checklist, a teacher can monitor whether or not a child can sort objects by color, shape, and size. The teacher can also record whether or not a child can place objects in order from smallest to largest, recognize simple patterns, extend simple patterns, and create simple patterns.

The teacher makes a checkmark whether or not a child can demonstrate these skills always, sometimes, or never.

Notice that the chart key guides everyone who uses the checklist to use the same criteria.

EMPHASIZE

It's important to use the information from checklists—that's what the tool is for!

DISCUSSION

Encourage participants to interpret the data and provide suggestions for adjusting instruction.

- Based on the data shown here, what do you know about the child's sorting and patterning skills?
- What are some potential next steps?

Record answers, if desired.

Possible responses:

Cameron consistently sorts objects by color and size but not yet by shape. He is beginning to sequence objects from smallest to largest. He is able to recognize simple patterns and is beginning to be able to extend them.

The teacher may continue to provide learning opportunities for Cameron to sort objects by shape, sequence objects by size, and extend simple patterns.

EMPHASIZE

It's important to work in partnership with the family in order to continue to support a child's progress.

LEARNING ACTIVITY: COMMUNICATING WITH FAMILIES

This activity gives participants an opportunity to practice interpreting checklist assessment information and sharing it with families.

Divide the large group into smaller groups or pairs.

HANDOUT

Distribute the *Communicating with Families* learning activity and review directions.

DISCUSSION

Bring the small groups back together for a large group discussion. Ask participants to share some key points to consider when working with families in gathering and sharing ongoing child assessment information.

Points to highlight:

- It's important to work in partnership with the family in order to continue to support a child's progress.
- Teachers and families need to establish a mutually agreed upon system for ongoing communication about a child's learning.
- Information needs to be understandable and meaningful for families.

NOTE

The following two resources offer additional information on working in partnership with families in ongoing assessment:

Ongoing Assessment: Partnering with Families in-service suite

Family Engagement and Ongoing Child Assesment web resource

http://eclkc.ohs.acf.hhs.gov/hslc/tta-system/family/docs/family-engagement-and-ongoing-child-assessment-081111.pdf

SLIDE 17: KEEPING IT SIMPLE

Checklists can be used to monitor the progress of an individual child or groups of children who are working toward common goals.

When using checklists for ongoing child assessment, it's important to remember to keep it simple.

- Plan to observe and document child progress systematically.
- Create checklists that are short, clear, and simple.
- Place writing utensils and checklists on clipboards around the classroom to:
  - » Facilitate easy access.
  - » Avoid missing assessment opportunities.
- Use checklists to monitor specific skills or behaviors.

EMPHASIZE

Create efficient ways to organize and use checklists for documenting child progress in multiple domains.

LEARNING ACTIVITY: CLASSROOM SCENARIO

This activity gives participants an opportunity to practice creating a checklist based on a given classroom scenario.

Divide the large group into smaller groups.

HANDOUT

Distribute the *Classroom Scenario* learning activity and review directions.

DISCUSSION

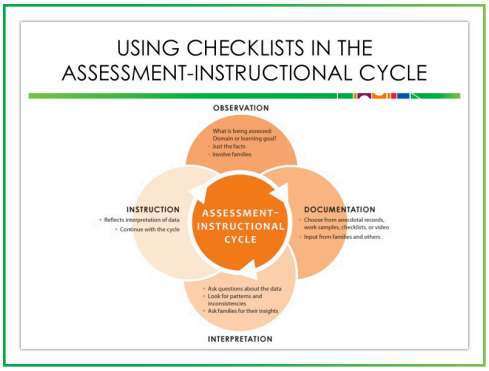
Bring the small groups back together for a large group discussion.

Ask participants to share and discuss their checklist designs.

If desired, have each group design their checklist on a large sheet of paper and post the paper at different locations in the room. Participants can walk around the room and look at each other's examples.

Points to highlight:

- It's essential to include all components of a checklist.
- Including the date, names, and activities will help you organize your checklists and keep track of children's progress.



SLIDE 18:
USING CHECKLISTS IN THE ASSESSMENT–INSTRUCTIONAL CYCLE

The assessment–instructional cycle refers to the ongoing and interrelated decision-making process that takes place during child assessment. Teachers continually make informed decisions about what to observe and why, and they choose the best ways to gather and document information about children's behaviors. They also decide how to organize, interpret, and use the information to guide and adjust their instruction. Throughout the process, teachers seek input from families and share information with them.

Here are four points to keep in mind:

Observation

You've learned about the importance of deciding in advance what to observe and how to plan for collecting information during regular classroom activities and routines.

Documentation

One way to document your observations is to use checklists.

Interpretation

For the checklists to be valuable, the teaching team needs to use them. After documentation, the teaching team, together with the child's family, interprets the information by looking at the facts or data, discussing possible meanings and underlying causes of behaviors, and summarizing findings.

Instruction

The teaching team, with input from the child's family, uses their findings to plan instruction and to make changes in teaching, so that every child will learn.

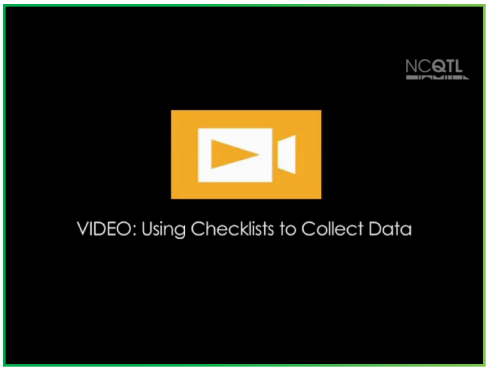
DISCUSSION

As the presenter, relate examples from your own experience of documenting and interpreting observations that lead to teaching improvements.

Ask participants to share examples of when they have changed their teaching, based on their own classroom observations.

EMPHASIZE

The steps in the assessment-instructional cycle repeat continuously for each child.



Length of video: Approximately 1 minute and 6 seconds

SLIDE 19:
VIDEO: USING CHECKLISTS TO COLLECT DATA

Introduce the video.

This is a short clip from the video we watched earlier in this session. As we watch it again, we will focus on how checklists provide information for intentional teaching.

VIDEO

DISCUSSION

Ask participants to share their comments about the video.

- Have the teachers in the videos given you a different perspective on checklists?
- How would you like to use checklists in your classroom?

EMPHASIZE

Checklists help inform teaching so that children can meet important learning goals.

SLIDE 20:
SUMMARY: USING CHECKLISTS

Checklists are efficient and can be easy to use.

Checklists can be adjusted and/or developed for the specific focus of an observation.

- Teachers can create individualized checklists that reflect the domains they would like to focus on within the curriculum.
- Teachers can identify specific skills and organize them according to a logical teaching sequence.

Checklists can inform instruction by guiding activity planning and lesson development, as well as providing information on what children are currently able to do.

Data collected from checklists can be used to share information with families and other support staff.

Checklists are versatile and have multiple purposes. Teaching staff can use checklists to monitor children's progress in one or multiple domains, or to focus on an individual child's learning of a specific skill.

Creating checklists and collecting ongoing assessment information is an effective and practical way to inform and guide teaching.

HANDOUT

Distribute handouts, if not distributed during the presentation. Based on participant roles:

- Distribute and review *Tips for Teachers*. This handout briefly highlights material covered in this in-service suite.
- Distribute and review *Tools for Teachers*. This handout includes two example checklists and two blank copies for participants' use.
- Distribute and review *Tools for Supervisors*. This handout is meant for participants who are supervising programs or grantees. It gives practical ideas for assisting teachers as they develop their own checklists for assessment.
- Distribute and review the *Helpful Resources* handout and highlight how the list can be used.

FOLLOW-UP ACTIVITIES

SHARE THE FOLLOWING SUGGESTIONS WITH PARTICIPANTS:

- Work with a colleague to develop a checklist and review data together on a regular basis.
- Share checklists with peers.
- Create a file or database of checklists for your center or agency.
- Consult with a more experienced teacher.

SLIDE 21:
CLOSING

Provide participants with NCQTL contact information and encourage them to visit our website for additional resources that support effective assessment and teaching practices in the classroom.