Foregrounding the Margins: A Dialogue about Literacy, Learning, and Social Annotation

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Recommended Citation

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Annotation, or the addition of a note to a text, is a practice that exemplifies the social qualities of writing (Cohn, 2019; Jackson, 2001). Whether written by hand as book marginalia or composed online using digital technology, annotation is a millennia-old, cultural, and interdisciplinary practice that augments the "social life" of documents (Brown & Duguid, 1996). Students, educators, and scholars alike all mark-up their texts as both an academic and interest-driven practice; in doing so, generative associations arise among text, people, ideas, and resources that can enliven inquiry and learning
(Kalir & Garcia, 2021; Licastro, 2019; Reid, 2014).

Teaching/Writing invited articles from authors prepared to present at NCTE 2020, but were cut due to COVID program restrictions. We thank the authors of this piece for sharing their work.

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NOVEMBER 2020
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We are a group of literacy educators working across K-12 and higher education contexts who research the ways in which annotation enables social and collaborative forms of reading, writing, and meaning-making (Kalir & Dean, 2018; Sprouse, 2018; Zucker, 2016). Lauren Zucker, a high school English teacher in New Jersey and education professor at Fordham and Drew University, uses the social annotation technology Hypothesis in her digital reading research and in her courses as a tool for personal and collaborative writing. Remi Kalir is an assistant professor of Learning Design and Technology at the University of Colorado Denver, the 2020-21 Hypothesis Scholar in Residence, and a cofounder of the

Marginal Syllabus, who studies how social annotation enables collaborative, open, and equitable learning. Michelle Sprouse is a PhD candidate in English and Education at the University of Michigan where she uses social annotation with first-year writing and teacher education students. Jeremy Dean holds a PhD in English from The University of Texas at Austin and is the Vice President of Education at Hypothesis, an open source social annotation software.

Collectively, our pedagogy makes use of—and scholarly efforts explore—*social annotation*, a genre of learning technology that enables the annotation of digital resources for information sharing, social interaction, and knowledge production (Novak, Razzouk, & Johnson, 2012; Zhu et al., 2020). In this article, which we have structured as a five-question dialogue among colleagues, we share various thoughts about the relevance of social annotation for literacy education and teacher education across learning environments.

Q1: Let's begin by sharing a memory of our experience with annotation. What's a book that you have annotated/fondly recall annotating as a student, and why?

Lauren: When I was student teaching, my supervising teacher loaned me her well-worn, annotated copy of *The Great Gatsby*. The first few pages equally inspired and intimidated me. She had defined vocabulary words, noted details about historical figures, hand-drawn a map of Long Island, and pre-written questions for students to consider. It seemed that she had anticipated every possible question or thought that her students might have and prepared the best possible response, right on these pages. As I dutifully copied her annotations verbatim into my own book, I naïvely believed that I held the script to master teaching in my hands. I ventured to study the text and commit her annotations to memory. And when I taught the book that first time, I delivered a well-rehearsed performance of someone else's reading of the text.

As a mid-career educator having read *The Great Gatsby* with over a thousand students, I can say with confidence that the margins of that Penguin edition don't have nearly enough space to fully capture one class period's worth of discussion, let alone all of the thoughts that a group of readers may have over time. Can I anticipate some of the questions that students might raise? You bet. Do I know, for the most part, which sentences or moments will confuse them in that opening chapter? At this point, I've committed the lines themselves to memory. However, rather than deliver my many-times mulled over interpretations, I use the text as an invitation for students to make their own meaning through activities like annotation, reflection, discussion, research, and writing. When I prepare a text for teaching,

sometimes I annotate it in advance. As we read and discuss it together, I occasionally offer my own annotation in response to a student's comment in a way that positions myself as a fellow reader and writer (e.g., "That's interesting. When I read that part, here's what I wrote down in the margins.") Other times, I'll read a text alongside my students for the first time, sharing my thinking and annotations as I go to model my process. And while I still treasure my personal teaching copy of a given text, it only provides a window into one reader's thinking.

Jeremy: In grad school, when Edward Said died, I was asked to write a retrospective review of *Orientalism* for a journal and so dug out my copy of the book from college. I'd read it for several courses in undergrad and so it had a lot of notes in it. I remember noticing the varying styles of annotation I'd used, becoming more and more sophisticated over time. My notes also read as a cross-section of my own intellectual history of my encounters with the book and Said's thinking. Of course the notes helped me write the review, bring me back to the text and my thinking around it.

When I began teaching, annotation was always a practice I tried to instill in my students' everyday activities. I got in the habit of handing out Billy Collins's "Marginalia" on the first day of every semester to try to inspire them. It was when I was teaching in grad school that I first discovered social annotation and it was a revelation, combining that analog scholastic practice that I'd found so vital to my own education with the social power of contemporary social media.

Michelle: I still have my copy of J.D. Salinger's *Nine Stories* that I read over and over again in high school while preparing to write my junior year term paper. It was my first literary essay to integrate secondary source material and I relished the opportunity to respond to other readers' interpretations. What I notice now is how little space there was in the margins to hold my thoughts—just three-eighths of an inch. I found room for only brief phrases written perpendicular to the main text, squeezed between lines, or marked by arrows curving toward an underlined word. Sometimes I squeezed my ideas into the gutter of the paperback that even after 25 years still resists opening. My summaries and thematic notes luxuriated in the white space at the beginning and end of each story.

Looking back now, I see that my career in English studies began on these pages. My appreciation for conversations about, within, and across texts continues as I practice social annotation with my students. In the digital margins, we expand our thoughts, making them legible to other readers, and we enjoy the space where conversations unfold.

Remi: Gould's *The Mismeasure of Man.* I attended a liberal arts college with flexible curricular requirements and, during my sophomore year, I arranged an independent study with my advisor. I don't recall the premise of our course—something vague about critical perspectives on culture and knowledge, media and meaning-making, that kind of thing. This course was just an excuse to meet regularly with a mentor and work through my burgeoning curiosities and confusions. What I recall about reading that semester—about my reading of works by Weber, Postman, Baldwin, and hooks—was a marked difference in my motivation. The enthusiasm is evident in my annotation. I didn't annotate much in high school; any books I have from those years reveal a smattering of lines, dots large and small, the occasional asterisk. During my first year of college, I remember annotation as a perfunctory task associated with course texts of little interest. I sold back or passed along most of those books, and I cannot imagine my marginalia being of much use to another student.

But this independent study was different. I was pursuing my interests. I was reading books recommended by a trusted guide. I was apprenticing my way, however awkwardly, into more scholarly thinking because of what, and who, I was reading. So by the time I read Gould, I was tapped into a productive synergy of motivation, curiosity, and ongoing discourse—discourse in my mind, on the page, and with my advisor. And I see that with the annotations all over *The Mismeasure of Man*. My notes are messy, exploratory, unintelligible, and juvenile. But my thoughts are there, on the page, a visual reference of rough draft thinking. And that's what matters to me, now—the ability to access tangible reader response as a record of meaningful learning.

Q2: How does social annotation create new opportunities for literacy education and, more specifically, the teaching of writing?

Lauren: Since so much of our current teaching and planning resides online, more than ever, literacy educators are seeking out digital resources and communities. Social annotation allows current and future teachers to jump right into ongoing conversations with fellow educators about teaching and learning. For example, my education students have joined conversations on the Marginal Syllabus (https://marginalsyllab.us) to think through various education topics with a network of virtual colleagues. Social annotation can expand teachers' professional learning networks beyond their local colleagues, and even beyond the professional organizations of their own disciplines.

Jeremy: Too often when we think about writing we think about the final product: a type-written essay printed out—at least in my day—and handed into an instructor.

I think annotation helps both instructors and learners re-orient the writing around a broader sense of *writing as a process*. Writing really begins while we are reading, when we first encounter a text, and begin to try to understand it and develop our own thoughts about it, and, with annotation, begin to put those thoughts into words.

We also too often think of writing as monastic. as one person's thoughts composed on a topic. In college, maybe this is less true as we are asked to incorporate the arguments of others—mostly published critics—into our own arguments. Rarely do learners in particular think of their peer's ideas or feedback as potentially contributing to their own. Social annotation helps connect both aspects of social learning: we learn and build knowledge by reading and engaging with the ideas of authors and peers.

Michelle: One of my biggest challenges as a first-year writing instructor is helping my students to develop nuanced understandings of what makes writing good. Rarely do they describe how particular readers (except their instructors) might respond to the writing when defining good writing. However, weaving social annotation throughout the writing process—reading model texts, research, peer review—helps my students see how other readers respond to the writerly choices (Bunn, 2011) made in texts.

Early each term, I assign students to small annotation groups of three or four based on shared interests so that the digital margins don't become overwhelmingly full of notes. Students work with these same groups during a peer review workshop. Coming to understand how their peers respond to writerly choices, my students also begin to anticipate their peers' responses to their own writing choices and to develop more contextualized understandings of what makes writing good and effective. I see this in students' annotations of their final drafts, where they evaluate their own writing not in terms of how I will respond as the instructor but in terms of the choices made for their intended audiences.

Remi: For a variety of reasons, I've been thinking a lot recently about equity-oriented literacy education and the ways in which power, agency, and voice are present—or are silenced—during learning activities. Amidst the early stages of the pandemic, the shift to emergency remote instruction surfaced anticipated challenges, like ensuring students' technology access and participation in high-quality online learning, as well as some surprising insights about family presence and new means of social connection. As literacy education, and schooling writ large, continue to toggle from online to on-the-ground settings and back again, it's critically important to ask about whose experiences are centered (and whose are inadvertently made marginal), whose stories are privileged, and whose voices lead

group inquiry. It may seem odd to bring up social annotation in this context, and I'm certainly not suggesting social annotation is the missing panacea. However, I do believe it's useful to remember that annotation is an everyday literacy practice that thrives in both books and online, that social annotation is dialogical and multimodal, and that annotation can help learners author and make visual their own stories and counternarratives. Whatever new literacy education opportunities and practices emerge as formal schooling continues to navigate pandemic-era learning, social annotation may be strategically leveraged by educators and students for multi-voiced interpretation, critical expression, and divergent approaches to reading and writing the world.

Q3: How can social annotation change the instruction and assessment of student writing?

Lauren: When I think about student writing and assessment, I try to take a broad view of the options for written products. Annotation becomes one of the many ways that writers can demonstrate their thinking throughout the writing process. For example, in the early stages of writing, students can annotate mentor texts, making note of moves and techniques they want to try out themselves. When drafting, students can annotate their own texts in the margins, asking questions along the way and creating a writer's memo for feedback from others. And annotations need not be written in alphabetic text: writers can annotate a text aloud with voice memos or screen recording technology, or they can use doodles, highlighting, or other symbols to mark up a text.

I also use annotations as a way for students to guide my reading of their work when I give feedback. For example, I may ask students to point out specific areas of their work that need attention, or to direct me to read part of their work with something specific in mind, such as the clarity or strength of their argument. I might also ask students to label their favorite sentence, which gives me some insight into their thinking.

Remi: Building on Lauren's response here as well as Jeremy's thoughts to our second question, social annotation has encouraged two major shifts in my assessment of student writing. The first shift is from writing as an individual product to writing as a social accomplishment. The second, and related, shift is from a singular focus on summative assignments to a more balanced focus on formative writing processes.

Whether in a middle school classroom or graduate seminar, there is a tendency— for many reasons—to facilitate and subsequently assess student writing as a product

that largely (if not wholly) reflects the skills and insights of the individual. Yet social annotation can meaningfully guide various peer-supported, and formative, activities that inform the collective development of ideas and the iterative improvement of written assignments. From annotation as coordinated analysis of primary sources, to annotation during peer review, to annotation as collaborative editing, there are many ways that the social qualities of annotation reveal writing to be a shared endeavor. Accordingly, the end-of-semester book report or analytic essay can be assessed along-the-way and as a social accomplishment. Students can retrace their drafting and revision processes, and reflect upon and literally make visible contributions from multiple people and perspectives—all through evidence provided via social annotation. I now perceive students' discussions, rough drafts, and revision processes as sites of mutual effort and group meaning-making, with social annotation my window into the back-and-forth-and-back-again emergence of quality writing.

Jeremy: To be honest, I felt lost when I graded essays, both when I taught high school and college. I often found myself asking "How did they get here?" in response both to the form and content of student argumentation. Teaching writing is largely about unpacking that final product into its formative pieces, and of course I did that with students (drilling paraphrase, demonstrating integration of quotation, etc.), but the landscape of effective (not "good"!) writing is vast and it's hard to see both the forest and trees as one needs to.

In an essay called "The Transition to College Reading," Robert Scholes writes, "We do not see reading. We see some writing about reading, to be sure, but we do not see reading." I often talk about social annotation as making reading visible. When students *socialize* their annotations with instructors, they bring to the fore the constitutive stages of the writing process that lead to the composition of an essay. Social annotation makes these parts of reading/writing/and thinking addressable and, if an instructor chooses, assessable.

From my point of view, social annotation is just as much about learners becoming more metacognitively aware of what it takes to write, read, and think effectively than it is about instructors more easily grading student work. I do believe social annotation provides more opportunities for instructors to guide students in development of skills around those processes.

Michelle: As Jeremy noted in his second response, writing begins with reading; it follows that our writing assessment should begin with student reading. Social annotation is a rich source of formative assessment information that helps me to adapt my lessons to the students in my classroom. I use the small group annotations

to guide our whole-class work, reviewing the group conversations when I write my lesson plans and centering their annotations as the content we discuss. What kinds of writerly moves do they identify when they read? How do they analyze how a writerly strategy is working and evaluate the use of that strategy for a particular audience? The social nature of these annotations increases the breadth and variety of strategies students notice. The more that students can identify, analyze, and evaluate writerly choices in their social annotations, the more likely they are to incorporate those strategies in their writing.

Q4: Why teach social annotation post-pandemic, and why is social annotation important now?

Remi: Because social annotation will be infrastructural to the future of digital education. The pandemic has made visible long-standing deficiencies in digital education, whether such learning occurs entirely online or is tethered, in various ways, to on-the-ground learning. For many learners, particularly in higher education, the requirements and realities of digital education are underwhelming; the mapping of a lecture hall to a learning management system is partly responsible for the modular delivery of content, the so-called "dreaded and threaded" discussion forum, and more insidious surveillance technologies like proctoring software.

As we've discussed throughout our dialogue, there is great value in learning activities that are contextual, interactive and peer-supported, proximal both technologically and topically to course content. For every course that assigns students something to read, social annotation will be a viable and relevant solution to the problem of disengaged online discussion. For every course that encourages students to engage with their peers to clarify terminology or interpret concepts or construct new knowledge, social annotation will serve as a low-barrier entry point for higher-level thinking and collaboration. And for every educator that seeks to scaffold digital learning experiences that build upon tacit ways of knowing, social annotation enables learners to easily activate their everyday reading, writing, and sense-making practices as marks on paper become shared resources and networked conversations. Annotate the syllabus. Annotate course readings. Annotate readings prior to or following other synchronous or asynchronous forms of discussion. Reference annotated texts throughout a course as resources for other assignments, like an interpretive essay or literature review. This is what I mean by infrastructural. There are compelling technical, curricular, and pedagogical reasons why social annotation should be an increasingly prominent feature of digital learning, particularly in post-pandemic higher education.

Lauren: As educators continue to adapt face-to-face instruction to virtual and hybrid environments, it can be tempting to fall back on instructional methods (e.g., lecture, presentations) that position the teacher as the authority. Educators may find it challenging to provide individual attention and feedback, and some students may be reluctant to participate verbally in an online setting. Lack of equal access to reliable WiFi means that not all students can engage with course material synchronously, and the limitations of video conference technology make it challenging for all students to be seen and heard even when they are present in real time. Social annotation positions students as agentive meaning-makers, allowing them to engage with course material, their peers, the instructor, and an even broader intellectual community, both in real time and asynchronously.

For suggestions about incorporating digital annotation in K-12 classrooms, see the blog post I co-authored with Dr. Kristen Hawley Turner (2020) in our References list.

Jeremy: I've been at this long enough so not all that much has changed in the context of Covid-19. I've always believed social annotation was a deeply valuable pedagogical tool for the teaching of reading and writing. And, like Remi, I think it could be a core practice in digital education in the future, which of course means all education, as I think the pandemic has shown us that digital environments are and always will be part of how we teach even when we can return to the classroom.

But one thing that has crystalized for me during the past year, mostly in listening to students and instructors encountering social annotation for the first time, is their heavier emphasis on the social aspect of social annotation. Yes, as we've discussed above, social annotation is transformative in terms of teaching reading and writing across the disciplines. During the pandemic it's been transformative for many in terms not only of the annotation piece, but the social piece.

I believe the goal of online and hybrid education should be to create authentic, equitable, and engaging digital learning spaces. Again and again users of Hypothesis told us this year that Hypothesis helped them stay connected with their instructors, students, and classmates after the outbreak of Covid-19 and the shift to remote teaching and learning.

Michelle: In my last pre-pandemic semester, social annotation was central to my first-year writing course. As Remi suggests, we annotated everything—the syllabi and assignment sheets, model texts, and student drafts. My students formed close connections in their annotation groups and often exclaimed "this class is just like high school." It was not the insult I first thought. What they meant was that they

felt deeply connected to their classmates whereas in their other courses they felt largely unknown to their peers and instructors.

One of our biggest challenges now as literacy educators is to strengthen the human-to-human relationships in our virtual courses. Social annotation provides an important opportunity for students to engage intellectually and affectively with each other. These relationships support student motivation and contribute to their understanding of reading and writing as social practices.

Q5: Lastly, what's one resource you'd highly recommend for those looking to learn more about social annotation in the classroom?

Lauren: As a teacher educator, I regularly reference Jeremy's piece, "Back to School with Annotation: 10 Ways to Annotate with Students" (Dean, 2015), which shares ten different approaches for annotation tasks (e.g., annotation as close reading, annotation as gloss, annotation as multimodal writing). The article introduces my education students to creative applications for annotation, and each time I reread it, it helps me design new activities for student readers and writers. I also love Jeremy's "Skills and Strategies" piece with Katherine Schulten for the NYTimes Learning Network (2015), which features a variety of examples of annotated texts (e.g., song lyrics, film scenes, maps) and provides suggestions for annotating Times content.

Michelle: Amanda Licastro's (2019) "The Past, Present, and Future of Social Annotation" outlines her approach to first-year and upper-level writing courses that uses social annotation to study how technology shapes reading and writing practices. Licastro assigns a "Book Traces" project which asks students to catalog significant annotations in library books, reflect on the differences in reading in print and online, and to create a design that addresses a need related to reading, writing, or communication tools. What I love about her work is that she builds opportunities for students to develop metacognitive awareness of how texts, technologies, and people interact to create meaning.

Remi: A few years ago, the Marginal Syllabus leadership team met in Denver to plan our next steps and strategize about the ways in which social annotation could meaningfully enable learners' collaborative, courageous, and also critical learning. A hallmark outcome of our work was a resource called "Why Annotate?" Created by Michelle King, of the Western Pennsylvania Writing Project, this resource suggests annotation "is an act of love because of one's commitment to stay in relationship with the creator and with other readers and observers." Michelle's

attention to curation, playfulness, and remix is especially compelling and relevant for any educator and group of learners interested in social annotation.

Jeremy: Aside from the Billy Collins poem "Marginalia" that I mentioned before, which I still love and think is a great way to introduce students to annotation: Sam Anderson's ["What I Really Want Is Someone Rolling Around in the Text'"](). It's a great essay that imagines the kind of social annotation experience that we can now deliver technologically. Hypothesis was actually founded the same year Anderson's essay was published. For me, Anderson captures what I love about social annotation: the desire to share ideas and hear the thinking of others that is part of reading. It's why English was my favorite class in high school, why I became an English teacher myself, and why I love what I do at Hypothesis. Also, you can read the Anderson essay annotated publicly by Hypothesis users! If you want a deep and comprehensive dive into annotation, though, I'd highly recommend Remi and Antero Garcia's book *Annotation* from MIT Press which (meta!) you can still read in its open peer review mode with commentary from other readers [on the PubPub platform]().

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