



Florida Association of Staff Development Leadership Conference

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**Florida and the Islands Regional
Comprehensive Center**

Description of Session

Participants will engage in a second experience in lesson study and evaluate their work using a rubric for lesson study. Once educators are clear about what lesson study is and why they might want to embrace it as a professional learning strategy for improving the learning for all students, participants will address the BIG questions of how, when, and where. They'll examine a variety of ways that they can do lesson study in their schools and districts and also consider how (when and where) districts and schools have implemented/enhanced lesson study. They will apply what they have learned to the plan they are creating for their own environments and get feedback from others

Outcomes

Participants will (KUD)

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Know

- What educators need in terms of KASB so that they can engage in lesson study.
- About variations that people can use in terms of implementing/enhancing lesson study.
- A variety of approaches schools and districts have taken to implementing/enhancing lesson study.
- Some strategies for facilitating lesson study.

Understand

- How to use a rubric to evaluate lesson study.
- How to implement/enhance lesson study in their own environments.

Do (Participants will. . .)

- Use a rubric to evaluate their own lesson study experience.
- Apply their learning to their own environments.
- Build on their first steps to implement/enhance lesson study in their own environments.

- Get and give feedback using the triad protocol.

Agenda for Session #2

Lesson study experience #2; reflection, and debriefing

Using a rubric to evaluate lesson study.

Choices-choices-choices: how schools and districts have implemented lesson study and what the variations can be.

Planning

Triad protocol for feedback

Revising plans

Closure

Opening Activity: 30-60-90 Take-Aways

What are your TAKE-AWAYS so far? Write down one or two of the ideas, concepts, or skills related to lesson study that you'd like to take-away with you so far. Take 30 seconds to find someone you don't know; share your take-aways; write down what your colleagues says, say thanks and move on. Do the same for 60 seconds and for 90. Then return to your table.

The Given Research Lesson

Ocean Creatures Lesson Plan
Subject - Science
Grade Level - 6

Science Standard: (Life Science) Students know and understand the characteristics and structure of living things, the processes of life, and how living things interact with each other and their environment.

Objectives:

1. The students will correctly use a KWL chart to organize information.
2. The students will create a flip chart of their animal about its habitat, characteristics, a labeled diagram of the animal, a Venn Diagram comparing and contrasting their animal to another student's, and any other important information.

Description: This is the first of three lessons on sea creatures.

Materials: Paper, crayons/markers/colored pencils, KWL chart, Venn chart (students can make these charts themselves)

Procedure:

1. Have the students select a sea creature. Make sure each student has a sea creature that is different from everyone else's selection.
2. Have them divide a piece of paper vertically into three parts. Have them label the first column K (for Know), the second column W (for Want to Know) and the third column L (for Learned).
3. Have them work individually on the first two columns

only, listing what they know about the creature and what they want to know.

4. Then, have them interview each other on their sea creatures, gaining any information they can in the Know column.
5. Finally, have pairs of students work together to create a Venn diagram of their two sea creatures.
 - a. On a piece of paper, have them create two circles that overlap. At the top of one circle, have them put the name of one of the student's sea creatures. At the top of the other circle, have them put the name of the other student's sea creature.
 - b. Have them work together to list important but distinctly different characteristics of each sea creature within that sea creature's circle.
 - c. Then, have them work together to list in the area where the circles intersect the characteristics that the two creatures share.
6. Have each pair of students present their Venn diagrams to the rest of the class.

Reflection on Your Second Experience in Lesson Study

What We Did: Lesson study simulation #2

What I Learned:

Reflection on What I Learned:

How I Might Use What I Learned:

A Rubric for Evaluating Lesson Study

Lois Brown Easton

Part One: Refinement of the Lesson

Characteristic	Beginning	Improving	Advanced	Accomplished
<p><u>Collaboration:</u></p> <ul style="list-style-type: none"> •Pausing •Paraphrasing •Probing for specificity •Putting ideas on the table •Paying attention to self and others •Presuming positive intentions •Practicing a balance of inquiry & advocacy <p>From Garmston & Wellman, <i>Adaptive Schools</i>, 1997</p>	<p>Participants either do not engage in refinement of the lesson or do so with one or two other people, not engaging with the entire group.</p> <p>Side conversations are common – some off topic.</p> <p>Participants may advocate for their own ideas, rather than building on others' ideas.</p> <p>It may seem that participants are in competition with each other for the best idea.</p> <p>They may harshly criticize someone else's idea or make fun of it.</p> <p>The atmosphere is somewhat tense and restrained.</p>	<p>Most participants contribute their own ideas or respond to others' ideas.</p> <p>Some may engage in side conversations about the lesson.</p> <p>Most participants begin to listen to each other, pausing and asking questions.</p> <p>Some participants advocate for their ideas and regard others' ideas as competition.</p> <p>Some participants inquire about others' ideas, trying to build upon them.</p> <p>The atmosphere is convivial.</p>	<p>Most participants contribute their own ideas and/or build on what others say.</p> <p>There are no side conversations on or off the topic.</p> <p>Some participants paraphrase what someone else has said before building on it.</p> <p>Participants ask others to comment on ideas.</p> <p>Participants share their ideas with a sense of tentativeness, rather than advocacy.</p> <p>The atmosphere is collegial.</p>	<p>Participants contribute their own ideas as suggestions.</p> <p>They may share their thinking (or assumptions).</p> <p>They ask each other to provide details or examples. or they "try out" details or examples to see if they fit.</p> <p>They paraphrase, checking to be sure they (and the group) understand the idea.</p> <p>Participants comment on how the dialogue is going; they are metacognitive about it ("I think we're doing well getting ideas out on the table" or "I'm not sure we've addressed all the angles.").</p> <p>The "final" ideas are often a result of many contributions to an initial idea.</p> <p>A positive "we're all in this together" atmosphere signals collaboration.</p> <p>The lesson is vastly improved because participants have gone deeply into</p>
<p><u>A Better Lesson</u></p>	<p>If a given lesson, it is not much better than it was.</p>	<p>If a given lesson, it is improved, but only in surface ways.</p>	<p>The given lesson is improved, but participants don't get into the</p>	<p>The lesson is vastly improved because participants have gone deeply into</p>

Characteristic	Beginning	Improving	Advanced	Accomplished
	If a newly “created” lesson, it is probably one that one of the team has taught, and the others agree to use that lesson, without much analysis.	If a newly “created” lesson, it is standard and sufficient but not particularly effective in terms of engaging students and helping them learn.	deep structural aspects of the lesson. The “created” lesson includes some effective teaching strategies or moves, such as building background knowledge and checking for understanding.	the logic and design of the lesson. The “created” lesson works because it is based on knowledge of students and how they learn and includes all aspects of an effective lesson.

Part Two: Teaching the Lesson and Collecting Data

Characteristic	Beginning	Improving	Advanced	Accomplished
<u>Teacher Role</u>	The teacher improvises, perhaps teaching a lesson she/he has already taught, but not necessarily adhering to the “planned” lesson. The lesson does not really work or, if it does, it works because of the idiosyncrasies of the teacher.	The teacher basically adheres to the planned lesson. The teacher’s style is, however, evident and noticeable, sometimes distracting from the lesson.	The teacher adheres to the planned lesson, but is attentive to the needs of students and adjusts the lesson but in a way that may distract from the lesson. Style does not interfere with the lesson.	Aspects of style that are important to student success, such as asking follow-up questions, are built-in to the lesson, so that any teacher could teach the lesson well. The teacher is attentive to the needs of students and adjusts the lesson accordingly, but style does not distract from the lesson design.
<u>Data Collection Roles</u>	The data collectors may be intrusive. They may be focused more on what the teacher is doing rather than what the students are doing. They may be focused on	Data collectors are not particularly intrusive, but they may be focused more on what the teacher is doing and lesson on what the students are doing. They may be collecting data	Data collectors are focused on specific aspects of the lesson, especially the decisions the lesson study team made to create or improve the lesson. They collect data on instructional moves, curriculum decisions, and formative and summative	Data collectors collect relevant data about generic strategies used in great lessons, specific strategies used to meet the goals of this lesson, and “moves” that the lesson includes, such as those related to curriculum, instruction, and assessment.

Characteristic	Beginning	Improving	Advanced	Accomplished
	<p>collecting data that is not particularly relevant to the lesson.</p> <p>They may be unsure what constitutes evidence related to data they are to collect.</p>	<p>that are related to generic concerns, rather than specific decisions (curricular, instructional, assessment) made by the lesson study team.</p> <p>They may still not be clear about what constitutes evidence related to the data they are to collect.</p> <p>Data collectors look for the effects on student learning or behavior as a result of teacher changes in the lesson.</p>	<p>assessment strategies.</p> <p>They are clear about what they are looking for: evidence/behavior that indicates that students are/are not learning.</p>	<p>They have analyzed the behaviors and signs of learning that indicate whether or not a lesson is working and are collecting exactly the right data for the lesson.</p> <p>Data collectors are alert to changes in the lesson that signal that different data might be collected. They adjust data collection accordingly.</p>
General	<p>Students are not engaged in the lesson and/or not showing evidence of learning.</p>	<p>Students may be engaged in the lesson, but they do not show evidence of learning.</p>	<p>Students are engaged in the lesson and show evidence of learning parts of the lesson.</p>	<p>Students are engaged and learning. They may show evidence of extending their learning or working in a more self-directed manner or collaboratively than they might have if the lesson had not been refined.</p>

Part Three: Colloquium

<u>Characteristic Teacher Presentation</u>	Beginning	Improving	Advanced	Accomplished
	<p>The teacher begins the colloquium and is not interrupted by others while reporting.</p> <p>The teacher describes what he/she did in the lesson, using the word "I."</p> <p>The teacher does not reflect on the results of what he/she did, according to what the lesson required.</p> <p>The teacher may reflect on changes that he/she made in the lesson, according to student needs, but the lesson itself may have been so idiosyncratic to the teacher that modifications are not self-evident.</p>	<p>The teacher describes the lesson with some reference to what "we" (meaning the lesson study group) decided as well as what he/she did.</p> <p>The teacher begins to reflect on the results of the lesson design.</p> <p>The teacher reflects on changes that he/she made in the lesson decided upon by the lesson study team, explaining what he/she did, but not always presenting the incentive nor the results of changing the lesson.</p>	<p>The teacher refers regularly to the lesson "we" (referring to the lesson design team) designed.</p> <p>The teacher reflects on the results of the lesson design.</p> <p>The teacher describes changes he/she made in the lesson and why, as well as results of the changes on student learning.</p>	<p>The teacher reflects on what could be done to further improve the lesson.</p>
<u>Data Collectors' Presentations</u>	<p>The data collectors report on the data they collected, one at a time, without being interrupted.</p>	<p>The data collectors suggest the meaning or importance of the data they collected.</p>	<p>The data collectors connect their data to the teacher's report on the lesson as well as to data collected by other data collectors.</p>	<p>The data collectors suggest what the lesson team might learn from the data they collected.</p>
<u>Learning & Application</u>	<p>The lesson study group does not summarize their learning as a</p>	<p>The lesson study group works together to summarize key</p>	<p>The lesson study group speculates about how the</p>	<p>The lesson study group keeps a journal of learning related to the</p>

Characteristic	Beginning	Improving	Advanced	Accomplished
	result of the lesson study cycle.	learning the team did as a result of the lesson study cycle.	lesson currently under study might be further improved and makes a decision about whether or not to improve that lesson or move on.	lessons they study; they also keep a portfolio of artifacts related to lesson study and periodically examine it to note progress.

Choices – Choices – Choices Implementing Lesson Study

A. WHAT WE CALL THINGS

Goals = Outcomes = Standards

Research Lesson = Lesson

Textbook/Workbook Lesson = Given Lesson

Lesson Created by Group/Individuals in Group = Created Lesson

Colloquium = Reflection = Debriefing

Research Teacher = Anyone in the Lesson Study Group
(not necessarily the teacher of the children experiencing the lesson)

B. CHOOSING AMONG VARIATIONS (BEFORE, DURING, AFTER)

Choosing the Lesson (which might you use?):

- Choose a prepared lesson from a textbook (teacher's edition) or workbook.
- Choose a prepared lesson from online.
- Choose a lesson someone has already taught (but wonders about).
- Choose a lesson that someone (who wrote and taught the lesson) wants to study.
- Choose a lesson that someone (who wrote but has not yet taught) wants to study.
- Choose a lesson that someone (or the lesson study group) wrote but has not taught.
- Choose a lesson that did not work as well as it should have.

- Choose a lesson that worked wonderfully.
- Choose a lesson that's coming up for most of the lesson study team.
- Choose a lesson within a unit that's coming up.

Creating the Lesson (which might you use?)

- As a lesson study group, create a lesson from scratch.
- Have one person or a pair or a trio within the lesson study group create a lesson from scratch.

NOTE: Use the templates in *A Guide for Implementing Lesson Study for District and School Leadership Teams in Differentiated Accountability Schools*, Florida Department of Education, Division of K-12 Public Schools, Bureau of School Improvement, June 2010, pp. 47, 49, 51, 55-63, 64.

How Far to Carry The Process (which might you use?)

- Carry it out all the way (from refinement of the lesson to reteaching and final colloquium).
- Decide not to refine the lesson for a second time, re-teach it, collect new data on it, and not engage in colloquium. NOTE: Not all lessons need to be re-taught. Sometimes, there's no way the lesson can be re-taught, given the schedule. Sometimes, lesson study teams decide they have learned all they can from the first refinement, teaching and colloquium. They decide to apply what they've learned from the first experience to an entirely new lesson.
- Stop after the group has analyzed and refined the given lesson (but remember, the ultimate test of a lesson is what happens to students).
- Stop after the group has analyzed, refined, and taught the given lesson (eliminate the colloquium) – how disappointing!
- Revise the lesson based on data from its first teaching and teach again (and again, and again?) with different students. Be sure to have a colloquium and collect learnings after each re-teaching.
- If the lesson only barely works with one group of students, consider revising the lesson, teaching it again to them, collecting data on how they do, and holding a second colloquium.

What to Do During the Process (which might you use?)

- Videotape the lesson to analyze either as part of the colloquium or after the colloquium (looking for specific things). If possible, have two cameras going – one on the teacher and one on the students (moving).
- Invite others in to watch the lesson – students from an undergraduate or graduate education class, professors from that class, teachers from another school, others?
- Include older students in the colloquium. Have them talk before the data collectors talk, but after the teacher has talked.

What to Do After the Process (which might you use?)

- Collect student work and analyze it using the tuning protocol or other processes.
- Do an assignment analysis (Standards in Practice) about the assignment itself (not the lesson it is embedded in). Analyze for rigor.
- Establish an action research group to research a problem that was revealed through lesson study – and an intervention that might resolve the problem.
- Write a case study about one or more of the students observed during the lesson study and analyze the case using a protocol.
- Go on learning walks (classroom walkthroughs) related to something learned in lesson study – note the absence or presence of what was learned (i.e., improving questions to get higher level responses).
- Compare data from lesson study with data from other sources. Engage in data-driven dialogue about the similarities and differences among the data sets.
- Have members of the lesson study group keep journals about their experiences.
- Have the lesson study group as a whole create a portfolio to represent their learning over the time they worked together (samples of before and after lessons, notes from the colloquium, changes the lesson study group wants to make in curriculum, instruction, assessment, etc.).

- Prepare a report about what was learned through lesson study – circulate it to peers and supervisors.

C. SOME BIG PICTURE EXAMPLES

A Possible Lesson Study Cycle¹

**Depending upon the needs of the school and the level of readiness, the length of time for each Phase may vary.*

School Year 2010-2011	PHASE I Scheduling and Planning	PHASE II Teaching and Observing	PHASE III Debriefing and Improving	PHASE IV ReTeaching And Reflecting	COMPLETION
1 st Quarter	3 weeks	2 weeks	3 weeks	1 week	Cycle One
2 nd Quarter	3 weeks	2 weeks	3 weeks	1 week	Cycle Two
3 rd Quarter	3 weeks	2 weeks	3 weeks	1 week	Cycle Three
4 th Quarter	3 weeks	2 weeks	3 weeks	1 week	Cycle Four

Appendix C-Scheduling and Planning Resource²

These are examples of common planning that can foster Lesson Study.

Example 1: Elementary School/Common Planning/Team Planning

All teachers are self-contained and teach all subject areas. Examples for implementing Lesson Study in this scenario:

- o Rotate the subject area that will be focused on each month (August-Mathematics, September-Science, October-Reading, November-Social Studies).
- o Determine the subject area and standard/benchmark focus according to the instructional needs of students as evidenced by student data (skills in need of improvement).
- o Include ESE teachers, instructional coaches (reading, math, and science), paraprofessionals, and special area teachers as appropriate.

Example 2: Elementary School/Common Planning/Team Planning (Two Teams)

¹ From *A Guide for Implementing Lesson Study for District and School Leadership Teams in Differentiated Accountability Schools*, Florida Department of Education, Division of K-12 Public Schools, Bureau of School Improvement, June 2010, p. 25.

² Ibid., pp. 38-9.

Teachers are teamed together for block scheduling. Examples for implementing Lesson Study in this scenario:

- o Math/science/social studies teachers meet together while language arts/writing/reading teachers meet together.
- o Rotate the subject area that will be focused on each month (August-Mathematics, September-Science, October-Reading, November-Social Studies).
- o Determine the subject area and standard/benchmark focus according to the instructional needs of students as evidenced by student data (skills in need of improvement).
- o Include ESE teachers, instructional coaches (reading, math, and science), reading coaches, paraprofessionals, and special area teachers as appropriate.

Example 3: Middle School/Common Planning/Team Planning (One Team)

Teachers are teamed together for block scheduling. Examples for implementing Lesson Study in this scenario:

- o Math/science/social studies teachers meet together while language arts/writing/reading teachers meet together.
- o Rotate the subject area that will be focused on each month (August-Mathematics, September-Science, October-Language Arts, November-Social Studies).
- o Determine the subject area and standard/benchmark focus according to the instructional needs of students as evidenced by student data (skills in need of improvement).
- o Include ESE teachers, instructional coaches (reading, math, and science), paraprofessionals, and special area teachers as appropriate.

Example 4: High School/Common Planning for Subject Area Teachers

Teachers are teamed together by subject area for block scheduling. Examples for implementing Lesson Study in this scenario:

- o Determine the NGSSS benchmark focus according to the instructional needs of students as evidenced by student data (skills in need of improvement).
- o Include ESE teachers, instructional coaches (reading, math, and science), paraprofessionals, and special area teachers as appropriate.

Examples of Plans:

<u>Plan #1</u>	<u>Plan #2</u>	<u>Plan #3</u>	<u>Plan #4</u>	<u>Plan #5</u>
The team asks	The team itself	Someone at the	PLCs are already	This district is

<p>interested educators to learn about lesson study, plan how to do it at next early dismissal.</p> <p>Interested faculty members attend, learn about lesson study by doing a protocol on an article, and participate in a mock lesson study cycle with given lessons (time: one early dismissal afternoon).</p> <p>Interested faculty members form lesson study groups according to subject area or grade level.</p> <p>They use their grade level or subject area meetings to refine a lesson and to engage in colloquium (time: one meeting for each).</p> <p>The district provides substitutes for one period a month for each grade level or subject area team member so they can observe lessons and collect data (e.g., substitutes come in for one whole</p>	<p>decides to engage in lesson study, inviting a few people at a time to participate with them.</p> <p>The team gets permission from district administrators to use a district-designated professional development day in January for lesson study purposes.</p> <p>Individuals from all schools attend the lesson study seminar put on by the team – they learn about lesson study by doing a protocol on an article, and participate in a mock lesson study cycle with given lessons.</p> <p>They are given time to plan what, if anything, they will do about what they have learned back in their schools.</p> <p>Most present an overview of lesson study at the next faculty meeting. Then, they invite interested faculty members to use their next late start days to learn more through reading about lesson study and participating in a mock lesson study cycle.</p> <p>Interested</p>	<p>district level sponsors lesson study and asks principals to “repurpose” a faculty meeting in order to learn about lesson study.</p> <p>The team as a whole travels to each school for a faculty meeting during which the team models lesson study while others watch. All participate in the colloquium and then engage in a discussion of how lesson study groups can be formed in the school.</p> <p>Team members serve as liaisons to each school-based lesson study <u>lead</u> group, which in turn, works with smaller lesson study groups based on grade-levels or subject-areas.</p> <p>The liaisons help the school-based lesson study lead groups dig into lesson study (reading an article and discussing it, for example). The liaisons help the school-based lesson study groups figure out HOW to do the</p>	<p>mandated in the district, and most schools have implemented them in some way.</p> <p>Some PLCs are little more than “business as usual,” however.</p> <p>The team presents a seminar on lesson study to district curriculum and professional development specialists, engaging them in reading an article and discussing it using a protocol. Then, the team engages the specialists in a mock lesson study, using a given lesson.</p> <p>The specialists want to become better at lesson study and designate themselves a lesson study team. They invite principals and assistant principals to join them each time they engage in a cycle. Towards the end of the year, every principal and AP has participated in a cycle and feels confident about introducing lesson study at their own schools – with the help of the team and the specialists. An</p>	<p>very small – one K-12 school with 30 full-time staff.</p> <p>The team of two attending initial workshops about lesson study decide to address the whole faculty and staff during an early dismissal day.</p> <p>They begin with data: What do we know about our students? How can we improve instruction to help them learn better?</p> <p>Then they introduce lesson study through a text-based protocol and model a lesson study cycle.</p> <p>They survey the staff online about continuing lesson study and find that most want to do so. At the next early dismissal day a month later, they have the staff and faculty engage in a mock lesson study cycle in small groups.</p> <p>The staff and faculty are naturally concerned because they are mixed grades</p>
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<p>day and cover all but 1 third grade teacher and 1 fourth grade teacher in the AM and all but 1 fifth grade teacher in the PM).</p>	<p>participants form cross-disciplinary and/or cross-grade lesson study groups and proceed as in Plan #1.</p>	<p>lesson study cycle using given PLC days and covering for each other when they are observing (e.g., when the fourth grade teachers are observing one fourth grade class, other grade level teachers cover the other fourth grade classes, and the favor is returned when other grade level teachers are observing. At the high school, when one subject-area group is observing, other subject-area group teachers on their planning periods cover the classes for the subject- area being observed).</p> <p>The lesson study groups start slowly, spending their first few meetings just discussing and refining given lessons. Then, they choose one they have refined and have someone teach it while the others observe. They meet in colloquium during the next grade level or subject area meeting.</p>	<p>opening-day inservice is cancelled and replaced by lesson study workshops led by teams of principals, APs, specialists, and the original team.</p> <p>Each PLC is “encouraged” to try-out one lesson study cycle, read about other processes that PLCs can engage in, and, by halfway through the year, decide how they want to work.</p> <p>Most implement lesson study (because they had the experience) but some also look at student work or assignments using protocols.</p>	<p>and subject areas but, in fact, they realize that (as one put it) “teaching is teaching.”</p> <p>They organize themselves into “adjacent” lesson study groups: primary grades, social studies at any grade level, reading in secondary school, etc. They have some connections, obviously, but they also have a rich diversity.</p> <p>They also make plans to link with two other nearby small schools. They want to have a lesson study day with their peers in these other two schools and find that an end-of-year day for professional development would work just fine.</p>
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D. GETTING MORE SPECIFIC:

WHO

Consider:

1. Who needs to know what's happening
2. Who needs to sponsor/champion the effort
3. Who needs to participate

Parameters	Roles	Your Thoughts
Groups of 3-8 Grade level Subject-area Adjacent grades Like subjects Interdisciplinary Cross-school Cross-district	Principals & APs Included Coaches Leadership teams Teacher leaders Teachers PLC facilitators District folks Outside expert Facilitator Students Parents/community members Instructional assistants	

B-3. Who is the intended audience for a Lesson Study?

School-site administrators, instructional coaches, department chairs, and subject area teachers are the intended audience for this training. Each of these members will have an assigned role. (Refer to Appendix B.) District administrators are encouraged to participate in order to foster collegiality between schools. This will allow for mentoring relationships and capacity building among teachers and administrators at different facilities (Fullan, 2006). (From *A Guide for Implementing Lesson Study for District and School Leadership Teams in Differentiated Accountability Schools*, Florida Department of Education, Division of K-12 Public Schools, Bureau of School Improvement, June 2010, p. 7)

4. Who might be the first facilitator

Initially: Principals & APs, coaches, teacher leaders PLC facilitators, district folks
Eventually – and ultimately – educators in the lesson study group themselves.
See pp. 14 and 71 of for more information about facilitation. Consider this: YOU might be the first facilitator.

5. Who might be outside “others

What role can the outside advisor or outside expert have? (from *A Guide for Implementing Lesson Study for District and School Leadership Teams in Differentiated Accountability Schools*, Florida Department of Education, Division of K-12 Public Schools, Bureau of School Improvement, June 2010, p. 37)

- Provide a different perspective when reacting to the Lesson Study work of the group
- Provide information about subject area content, new ideas, or reforms in the field of expertise
- Share the work of other Lesson Study groups

6. Roles Participants Play in Lesson Study

(from *A Guide for Implementing Lesson Study for District and School Leadership Teams in Differentiated Accountability Schools*, Florida Department of Education, Division of K-12 Public Schools, Bureau of School Improvement, June 2010, p. 37)

What roles can the instructional coaches or facilitators have in the Lesson Study process?

- Introduce Lesson Study to the team
- Appoint a record keeper for the discussion
- protocols and group norms
- Ask reflective questions as needed to keep your group focused on their goals
- Make sure the conversation is not dominated by one or a few team members
- Assign roles and be sure all participants are aware of their responsibilities
- Commence the debriefing: introduce the team and outline the structure of the discussion
- Manage time to allow each team member the opportunity to speak

What roles can the teachers have in the Lesson Study process?

- Align the lesson to the Next Generation Sunshine State Standards and Benchmarks
- Ensure that lessons address the appropriate levels of cognitive complexity
- Promote the lesson design based upon ideas about how students learn best
- Observe student learning when the lesson is taught
- Anticipate student response
- Dialogue within the debriefing or colloquium
- Create, collaborate, develop, teach, practice, dialogue, refine, and research lessons
- Observe and collaborate in conversation about the effectiveness of the lesson
- Evaluate to determine if the lessons are helping students to learn
- Analyze and note observations of student learning both during and after the lesson
- Use the information obtained about student learning to revise the lesson and inform instructional practice
- Implement a variety of teaching methods and learning resources

- Promote cooperative learning

What role can the record keeper have in the Lesson Study process?

- Take notes of the debriefing
- Produce a summary of the debriefing for the Lesson Study report
- Make sure that the lesson summary is given to the team member who is taking responsibility for reporting your Lesson Study
- Use the Lesson Study Group Log to record attendance, summarize the learning and have a record of the work; provide a copy to the school principal and keep a copy for the group

What role can the administrator have in the Lesson Study process?

- Promote professional development for all staff members
- Provide training to all administrators
- Allocate time and funds for the Lesson Study groups to meet
- Arrange for Lesson Study group members to earn in-service credit
- Advocate for Lesson Study with the superintendent and school board
- Help identify and secure resources for Lesson Study groups
- Attend Lesson Study sessions to be knowledgeable about the work

WHAT (Very Specifically)

Lesson study cycle

Step One: Beginning of year, whole school looking at a variety of data, setting goals for year (academic and, if possible, personal/social/character)

Review goals periodically during year: Evidence? Adjustments?

Step Two: Select subject, unit, “soft” and upcoming lesson

Refine lesson

Step Three: Teach lesson (anyone teaches) and collect data

Step Four: Hold colloquium and decide what to do next.

Possible Step Five: Revise lesson

Possible Step Six: Re-teach lesson & collect data

Possible Step Seven: Hold colloquium and decide what to do next.

HOW AND WHEN

Imagine 3-6 lesson study cycles a year.

Imagine lesson choice and refinement (1-6 hours) occurring during

- PLC time

- Early release/late start

- Department/subject area meetings

- Grade level meetings

- Faculty meetings that have been repurposed

- Before/after school – contract time or stipend provided

Imagine lessons that

- Will be taught soon

- Have “soft spots” in them – difficult for students and/or teachers

- Take the usual time allotted to them

Imagine teaching the lesson and collecting data during

- The school day

- Summer school

- With substitutes that rotate (1st period for one lesson study group, 2nd for another)

- With others “covering” classes: reciprocity

- Combined classes/special projects

Imagine the colloquium and decisions about the next lesson to study occurring

- After school the day the lesson is taught

- At the next PLC time, early release/late start, department/subject area meeting, faculty meeting that has been repurposed

- Before/after school – contract time or stipend provided

A GUIDE TO FACILITATING LESSON STUDY³ Lois Brown Easton

Introduction

Groups that are just starting up need a facilitator. People who have never worked together need a facilitator. A regularly scheduled group may have less need for an outside facilitator; after the group has become familiar with a process or protocol, members of the group may facilitate the work themselves.

Three Responsibilities

Allen and Blythe describe three responsibilities of the facilitator as **Learning**, **Logistics**, and **Longevity** (2004, pp. 34-6). In terms of facilitating **Learning**, the facilitator works to make sure that individuals and the whole group learn. In terms of **Logistics**, the facilitator handles what most people think is the job of facilitators: who, what, where, when and communicating those details. The role of fostering **Longevity** is particular to protocols (lesson study is a kind of protocol); the facilitator wants to be sure that participants relate their protocol work to what they are doing to help students learn; become committed to the process and to each other; invite others to join the work; and communicate the importance of the work (2004, p. 35).

Thinking Dispositions

Allen and Blythe also describe some “**thinking dispositions**” that facilitators need (2004, pp. 36-42). For example, they need to be able to “read” groups and determine what needs to happen next. This involves intense observing and listening and “just in time” action regarding situations. Sometimes, facilitators stop a group to do a “process check” to get the group’s “read” on what’s happening and what to do. Sometimes, facilitators decide to do nothing at that moment; they take a “wait and see” stance and sharpen their listening and observing even more, ready to act if needed. Here are some actions facilitators can take when they perceive a need to alter the protocol:

- Allow more time for a particular step
- Decrease time for a particular step
- Allow someone to speak during a time that person should be silent (in order to be sure the group has important information)
- Add another round of part of the process that seems to need additional work

³ Some of this material came from L. B. Easton (2009). *Protocols for Professional Learning*. Alexandria, VA: ASCD.

- Change the order of the steps

According to Allen and Blythe, these actions should be named for the group along with the reasons for the move – and the group should agree or not to making the moves. And, then, the whole group should discuss during the debriefing why the move needed to be made.

Moves

Allen and Blythe speak of “**moves**” as they describe what a facilitator does (2004, p. 45). Some moves get a protocol started (moves that set the stage and the tone). Some moves occur during the protocol (moves that set the pace, encourage depth, and check in with participants). Other moves occur during the debriefing that concludes most protocols (moves that invite reflection, maintain focus on reflection, and support documenting the conversation).

Reflecting

Good facilitators get better by **reflecting** on what happened during a protocol and what they can learn about facilitating. They need to ask groups they facilitate for feedback. Facilitators can also improve their facilitation by watching other facilitators, as well as experimenting “consciously with different approaches” and being “aware of the impact those different approaches have on the group’s work” (Allen & Blythe, 2004, p. 43).

Important Moves for Facilitating Lesson Study

Step One: Refining the Lesson (when not creating one from scratch but using a given lesson)

- Set norms (if needed)
- Remind the group of the year’s goals (based on data and decided by the whole school at the beginning of the year. These will be academic goals but they may also be social goals, such as listening well to each other.
- Make sure everyone knows the purpose of this step: To improve the given lesson so that it is likely to be quite successful in helping students achieve outcomes. A lesson can always be improved; at some point, a lesson study group stops working on it, however, and says, “We need to try this out on students, get some data from them, and then decide where to go from here.”
- Be sure everyone reads the lesson. Don’t begin until everyone has done so.
- Be sure everyone understands the standard or benchmark that is being addressed in the lesson. Be sure everyone understand the outcomes (knowledge, understanding, and doing) that are supposed to be demonstrated by students at the end of the lesson.

- Encourage the group to speculate on what students might do at each stage of the lesson.
- Encourage them to anticipate misunderstandings – “Where could this lesson ‘go bad’?”
- Encourage them to share strategies they would personally use to teach this lesson.
- Encourage them to listen to and consider all strategies.
- Encourage them to build on each others’ ideas, check their understanding of the idea, suggest examples, add details, etc. No idea should be dismissed immediately. All ideas are worthy of consideration.
- Some lesson study groups – at least initially – may want to stay on a rather superficial level in terms of examining the lesson. They may declare the lesson as it is “good enough,” for example. Here is where the facilitator needs to probe: “Is good enough OK for our students? Will good enough help all of our students learn? Can we make this the best lesson possible for all students? Can we make this lesson the best lesson possible for students who are struggling to learn?”
- In addition, ask probing questions. Here are a few starters for probing questions:
 - “What would happen if. . . ?”
 - “How would X be different if. . . ?”
 - “What’s another way we might. . . ?”
 - “What do you assume to be true about. . . ?”
- At some point in the process, help the group to reach decisions and record them in the form of annotations on the original lesson plan or as a new lesson: “Can we agree on this?” “What decision have we come to?” “If we do that first, what would we do next?”
- If there’s time, have someone print up a “master” of the refined lesson so that all lesson study group members have the actual lesson in hand as they collect data.
- Have one of the group volunteer to teach the lesson. Volunteering is best, but at some point, a teacher has to be chosen. . . some way. Emphasize that 1) lesson study is NOT about the teacher, since the teacher is obligated to be faithful to the lesson designed by the whole group; and 2) if something the teacher does that is not in the lesson (something particular to the style of the teacher, for example), both the teacher and the data collectors should note it (when the diversion from the agreed-upon lesson happened, why, and whether or not the diversion was effective) and

discuss the action in the colloquium. It may be that the teacher's at-the-moment action should be incorporated in the lesson itself or applied to future lesson refinement.

- Have the remaining members of the lesson study group decide what data they want to collect. Data can be specific to the lesson ("Watch what happens at this point and note whether students are able to connect the first activity to the second.") or general (level of student-to-student Q & A).
- Confirm when the lesson is to be taught and to whom (Note: Be clear with them that someone other than their own teacher may be teaching the lesson, and it might not fit with what they are doing in the classroom. . .but that lesson study is a very valuable experience for educators. If possible, of course, the research lesson should be the next lesson in a unit sequence for students. . .but sometimes that's not possible and they simply have to adjust to participating in a learning experience that might not fit what they are otherwise studying.)
- Confirm when the colloquium will occur (as soon as possible after the research lesson is taught).
- Make sure that the students are told what is happening in the class during which the research lesson is to be taught. Explain how important it is to teacher learning that lessons like this one be taught to real students.
- Make sure that others who need to know (principal, e.g.) when and where the research lesson is going to be taught.
- If possible, arrange for students to provide feedback on the lesson (even come to the colloquium). They can complete reflection sheets explaining what they learned in their own words (thanks to Duval County Public Schools, FL).
- If possible, arrange to collect student work from the lesson to examine either as part of the colloquium or later (through a tuning or other protocol for examining student work).

Step Two: Teaching the Lesson and Collecting Data

- If this hasn't already been done, be sure students understand the purpose of teaching the research lesson to them. Explain the purpose of lesson study and comment on its fit with what students are otherwise learning.
- Let the teacher of the lesson work uninterrupted (unless he or she asks for assistance). Especially do not interrupt the teacher if he or she seems to be

diverting from the planned lesson. The decision to divert (and the success of the diversion) will be discussed in the colloquium.

- Data collectors should be as unobtrusive as possible, along the wall or standing to the side and in back of a student (if the data collection plan calls for data about individual students). They should not engage students in conversation, correct them, provide answers, assist them, or interact in any way.

Step Three: The Colloquium

- Arrange the tables/chairs in a circle so people can see each other.
- Announce the procedure (below) and the expected outcomes: “We will end this colloquium by deciding what we have learned and can apply to lessons we craft. We will decide whether or not we want to apply what we have learned to reworking the research lesson just taught or not. If we decide to rework this lesson, we need to establish when we’ll do so, and when and to whom (a new group of students) we’ll teach it again. If we decide not to rework this lesson, we’ll want to take what we’ve learned to refining the next lesson in the same or a future unit.”
- Have the teacher reflect aloud about the lesson, perhaps step by step, describing what worked and what didn’t work. Help the teacher focus on the lesson – what was decided by the whole group – more than what he/she did to teach the lesson: “The lesson was effective until we changed materials” vs. “I was able to help students learn until we changed materials.”
- Have the teacher describe when diversions to the agreed-upon lesson were necessary. The teacher should be sure to describe what caused the diversion (what the cues from students were), what the diversion was (the action) and whether or not it worked. The teacher may also speculate on the power of the diversion – did it make enough of a difference in student learning that it should be added to the research lesson or included in planning the next lesson?
- While the teacher is talking, the rest of the group should be silent, taking notes, if necessary. When the teacher is finished reflecting, he or she should announce that.
- Then, the data collectors should, one-at-a-time, present their data and speculate on what the data mean/how important the data are. Everyone else is silent, perhaps taking notes.
- Next, if there are others in the colloquium (such as students) they should report their observations one at a time while others are silent.

- Finally, the whole group should engage in dialogue – listening to each other and building on each other’s ideas with examples, details, etc. – about what they individually and as a whole group learned through study of this lesson.
- They might want capture key learnings in a journal and place it and materials related to this research lesson into a portfolio, as a form of accountability.
- They should decide whether or not they want to use their learning to revise the research lesson just taught or not. If not, they should note that they will be applying their learning to the next lesson they will study.
- The facilitator should remind the group of the next meeting day, time, place, and purpose.
- Someone in the group (perhaps the facilitator) should report results of the lesson study experience to others (principal, coaches, district office) as necessary.

Beginning/Enhancing Lesson Study

Directions: Work individually or in a pair or trio to plan how you might start doing or enhancing lesson study in a school you know well. Be ready to share your ideas in the Triad Protocol.

1. School/organization:

Describe the school or organization (basic demographics):

Readiness for lesson study:

Boosters (forces for)	Barriers (forces against)
Ways to Enhance Boosters	Ways to Minimize Barriers

2. Accept or modify this major outcome:

Educators will use lesson study as an embedded form of professional learning to help all students succeed.

3. Then, based on this outcome, do some backwards planning to decide on enabling outcomes using the following KASB scheme.⁴

Knowledge

Conceptual understanding of information, theories, principles, and research.
What will people need to know?

Attitude

Beliefs about the value of particular information or strategies. What beliefs or aspirations do people need to have about PLCs?

Skills

Strategies and processes to apply knowledge. What strategies and processes do they need in order to start or refine a PLC?

Behavior

⁴ Killion, J. (2002). *Assessing Impact: Evaluating Staff Development*. Oxford, OH: National Staff Development Council, p. 212.

Consistent application of knowledge and skills (habits of mind, work habits, processes they use). What behaviors will you see when people are making progress towards the major outcome?

4. Begin to plan first steps to achieve outcomes.

TASK: What are we going to do?	TALENT: Who will be responsible for doing what?	TIME: When will we do it?	RESULTS: What results do we want to achieve?
Example: Share this information with colleagues	Example: Shirley & Brad	Example: Next faculty meeting	Example: Most faculty members want to know more.

How will you support each other in terms of implementing lesson study?
How will ensure follow-up?

THE TRIAD PROTOCOL⁵
FOR EXAMINING PROFESSIONAL PRACTICE

SOURCE OF PROTOCOL: Unknown. Developed by Lois Brown Easton.

OVERVIEW OF PROTOCOL:

This protocol works much like the Success Analysis Protocol, except the subject is not necessarily a success. In fact, this protocol is quite useful for getting and giving feedback on work in progress – for example, revising curriculum, constructing assessments, or developing policies.

OTHER USES OF PROTOCOL: Like the Tuning Protocol, this is an all-purpose protocol. This protocol can be used in discussions to help people process ideas. It can help participants gain closure on ideas. Groups can do Triad Protocols on almost any aspect of education

NUMBER OF PARTICIPANTS: Any number of participants divided into groups of 3.

Groups can be job-alike. They can be random or self-selected. They can be carefully constructed to ensure diversity in each group.

TIME REQUIRED:

Each round features one of the triad as presenter, the others as responders or summarizers. Each round is between 10 and 15 minutes. In groups of three, with three presentations, the total time required is 30 to 45 minutes.

STEPS (with approximate timing for a 50 minute triad protocol):

Preliminary Step – Forming Groups (about 5 minutes)

1. Have people form small groups of 3.
2. Have participants decide who will be A, B, and C in their triad.

Step One – Round One (about 15 minutes)

1. A is the presenter in this round. This person describes an aspect of professional practice.
2. B is the discussant in this round. A speaks without interruption and then B This responds to what A is saying with a comment, question, example, or detail. . .building on what A is saying.
3. C is the observer in this round, listening quietly, saying nothing, and taking notes. After A and B have talked, C summarizes what they have said, adds comments, and presents some conclusions.

⁵ From L. B. Easton (2009). *Protocols for Professional Learning*. Alexandria, VA: ASCD.

Step Two – Round Two (about 15 minutes)

Participants change roles so that each triad has a new A, B, and C, who perform the functions under Round One.

Round Three – Round Three (about 15 minutes)

Participants change roles so that each triad has a new A, B, and C, who perform the functions under Round One.

CRITICAL ELEMENTS:

The only critical element to this protocol is the seriousness of those engaged in the protocol – their willingness to focus on the topic or professional practice being discussed. If there is time and the whole group desires, the groups may want to share what they learned through the Triad Protocol. A facilitator can lead the entire group in a discussion of what the small groups learned, and a recorder can collect that information on chart paper.

TIPS FOR THE FACILITATOR:

A room facilitator can help establish the groups and set up the timing, announcing when groups should start and finish rounds, even announcing when each person should begin and end (the presenter, the observer, and the discussant). If the whole group is quite large, yielding many groups of three, the room facilitator might want to have each group agree to monitor itself, adhering to the times for starting and stopping each round or for the total protocol. If it's important to capture what each group learned, the facilitator can make sure that happens efficiently.

Closure: 4 X 4
