

## Lesson Study Protocol

Lesson study is curriculum-based professional learning (CBPL) protocol that can be used during ongoing implementation. This protocol is designed to empower educators through refinement of key teaching practices within the local curriculum and high-quality instructional resource(s) (HQIRs) in order to improve student outcomes. **Lesson study is most effective once educators have a deep understanding of the local curriculum and HQIR and have routinely engaged in cycles of intellectual preparation (unit/lesson internalization, lesson rehearsal and student work analysis) during early implementation.**

Working collaboratively within PLCs, educators identify a research question that will drive the inquiry process. Once the team has established the research question, they work through lesson study cycles focused on deepening their understanding and refining instructional practices aligned to their question. The key components of the lesson study protocol and approximate time frames for each include:

- **Lesson Study (Overall)** – may occur over the course of the semester or school year depending on the complexity of the research question, typically two to three lesson study cycles in a semester.
- **Establishing an Initial Research Focus and Question** – completed at the beginning of the study typically over a two-week time period and revisited during each lesson study cycle.
- **First Lesson Study Cycle** - comprised of collaborative lesson analysis, classroom teaching and observation, and a debriefing session; typically takes two weeks to complete.
- **Subsequent Lesson Study Cycles**- follow similar structure and pacing (see “Important Note” on p. 4).

### Preparation and Study

*This portion of the protocol should be completed prior to the first cycle of lesson study. Ideally, this portion would be completed over the span of approximately two weeks.*

#### **Establish a research focus and question. (Approximately 45 minutes)**

- Review units of study in the curriculum/HQIR(s) and data on student outcomes to identify a potential “problem of practice,” and then formulate that instructional element as a research question to drive this inquiry. Example research questions include:
  - *How can we develop students’ capacity to collaborate effectively in order to deepen content area understandings?*
  - *How will we model close reading more effectively as a support for students analyzing the complex, grade-level texts included with the HQIR?*
  - *How will we engage students in the mathematical practices to deepen content area understanding?*

#### **Study to learn more about the focus of the research question and synthesize findings.**

- **Independently (Approximately 2 hours):**
  - After crafting a research question for lesson study, explore what is already known about the focus. This includes supports within the curriculum and HQIR and relevant professional literature. Teachers may also want to call on subject-matter specialists, like instructional coaches or professional learning partners.
- **Collectively (Approximately 45 minutes):**
  - Synthesize learning based on exploration to establish an initial understanding prior to engaging in the first cycle of lesson study.

- Identify an upcoming lesson from a unit/module within the HQIR that aligns to the research question and offers opportunities for exploration. Confirm that the research question focus will also align to some lessons later in the unit/curriculum for follow-up cycles of lesson study.
  - Make sure all agree with the rationale for selecting the particular lesson.

### **Determine logistics (Approximately 25 minutes)**

- Determine who will be in the role of “facilitator,” “recorder” and “timekeeper” for “Analyze and Plan” and “Reflect and Apply” stages. In some cases, an outside facilitator like an administrator, instructional coach or high-quality professional learning (HQPL) provider might serve in that role.
- Establish collaborative norms/expectations for both the “Study and Plan” and “Reflect and Apply” stages. Possible norms include:
  - *Be fully present. Listen attentively, focus on the person speaking and what they are saying, avoid side conversations, and participate.*
  - *Keep focused on the work. Give specific descriptive feedback that is nonjudgmental.*
  - *Be respectful. Use “I” statements. Share the air. Suspend your assumptions. Agree to disagree, recognizing that differences in perspective exist. Make space for everyone’s ideas.*
  - *Don’t rush to solutions. Lead with inquiry.*
  - *Make this a safe place. Be mindful of the need to nurture risk-taking and honesty.*

## Analyze and Plan

*This portion of the protocol is the first component of each lesson study cycle and may be completed during PLC meetings.*

### **Analyze the targeted lesson through the lens of the research question. (Approximately 45 minutes)**

- Review group norms.
- Identify an upcoming lesson that aligns to the research question and offers opportunities for exploration.
  - Make sure all agree with the rationale for selecting this particular lesson.
- Analyze the lesson plan to identify key elements (working through the Lesson Internalization Protocol can support deep analysis of the lesson). Key areas to consider include:
  - *Kentucky Academic Standards* or portions of standards addressed;
  - Standards-aligned learning goals for the lesson;
  - How lesson flow and sequence build toward the learning goals;
  - What students will do to demonstrate knowledge, understanding and/or skill and how their thinking will be made explicit/visible;
  - Possible misconceptions students may have and challenges they may experience during the lesson;
  - Curriculum-/HQIR-embedded supports provided to help address learning needs; and
  - How the focus of the research question supports students successfully reaching the learning goals.

### **Prepare for the observation. (Approximately 25 minutes)**

- Determine which team member will teach the lesson and set the date/time for the observation (the teacher role should rotate each cycle).
- Determine what evidence the team should collect that aligns with the lesson learning goals and the research question. Review how learning will be demonstrated and thinking made explicit/visible.
- Develop notetaking/evidence-collection template and ensure everyone knows how to use it.

- Assign how evidence will be collected (focal students, table groups, whole class, student moves, teacher moves, patterns of participation, types of questions asked, etc.).
- Establish norms for lesson observation. Possible observation norms include:
  - *Respect the classroom atmosphere. Silence phones, refrain from side conversations, arrive on time and stay for the entire lesson.*
  - *Feel free to lean in, get close, look and listen.*
  - *Do not help students or interfere with the natural flow of the lesson.*
  - *Collect requested evidence. Stay present and record observations on the team-developed template.*
- If non-team members (e.g., school/district leadership, instructional coach, vendor representative) participate in the classroom observation, ensure they receive copies of the lesson plan and review it ahead of time, understand the evidence the team wants to collect, how to collect it, and how the lesson and evidence aligns to their research question.

## Teach and Observe

*This portion of the protocol is the second component of each lesson study cycle. The observation would ideally take place no later than five days from the collaborative lesson analysis.*

### **Selected team member teaches the lesson.**

- If the team has carefully anticipated the students' possible reactions to the lesson and identified instructor responses, changing the lesson during the teaching is usually not appropriate. However, if the teaching situation unfolds in a way that wasn't anticipated, the teacher should feel comfortable adjusting aspects of the lesson plan if necessary.

### **Team members observe and collect evidence.**

- Review the norms for lesson observation.
- Use notetaking/evidence-collection template to capture evidence and record thoughts and questions aligned to the lesson's learning goals and the research question.

## Reflect and Apply

*This portion of the protocol is the third and final component of each lesson study cycle. The debrief should take place during a PLC meeting as close to the observation as possible.*

### **Reflect independently and collectively on the lesson.**

- Allow time for independent review of observation notes, strategically selecting key points of evidence that best support the research question (patterns, outliers, anticipated vs. unanticipated responses, etc.) and successes that might be built upon. Consider writing a brief reflection to synthesize thoughts.
- Review group norms.
- Teacher who taught the lesson should have first opportunity to briefly comment on initial reactions.
- Debrief by sharing key observations, thoughts and evidence aligned to the lesson's learning goal(s) and research question (led by facilitator with thinking held by recorder).
  - Focus on specific ways learning was demonstrated and student thinking was made visible.
  - Discuss why what was observed matters with emphasis on how it connects to the learning goal(s) and research question.
  - Use available evidence to analyze unintended difficulties students may have experienced.
  - Explore any student responses that may not have been anticipated.

- Ask clarifying questions as others share, making sure those most critical to discuss get asked.

**Determine next steps and how what was learned will be applied.**

- Identify insights regarding the research question this cycle has revealed.
- What are the takeaways and strategic next steps as a team?
  - Implications for future instruction
  - Implications for the research question
- Determine adjustments each team member will make in the short term based on this lesson study cycle.
- Decide together which lesson from the HQIR might drive the next cycle of the lesson study.

❖ **Important Note:** Each time the lesson study cycle repeats:

- Review the research question to see if tweaks are needed to reflect current thinking;
- Determine new learning needs based on team's current thinking;
- Shift observed teacher, facilitator, recorder and timekeeper roles as needed;
- Revisit collaborative norms and lesson observation norms to see if any changes are needed; and
- Identify an upcoming lesson from the HQIR that aligns with the research question that will be the focus of the next lesson study cycle.