ELA Virtual Lesson Study:  
A How-to Guide

The purpose of this document is to provide guidance to groups who are interested in conducting Lesson Study as a form of professional learning in the content area of English Language Arts.
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Introduction

What is Lesson Study?

Lesson study is a form of professional development long favored by teachers in Japan that has recently gained attention in many parts of the United States. Teachers participating in lesson study immerse themselves in a cycle of instructional improvement focused on planning, observing, and revising “research lessons” (Lewis & Tshuchida, 1998). (See Figure 1.)

The research lessons at the heart of the lesson study process are actual classroom lessons that provide opportunities for teachers to bring their ideas about effective teaching to life as they learn how to carefully record student learning in order to evaluate the research lesson, the students, and their own understandings about teaching and learning (Lewis, 2002).

In lesson study, teachers work together to:

• Form a lesson study group and establish norms and procedures.
• Identify professional development goals.
• Form goals for student learning and long-term development. These goals are informed by studying existing curricula and standards and by teachers’ discussions of the qualities they would like students to have 5–10 years in the future.
• Collaboratively plan a “research lesson” based on immediate and long-term goals.
• Teach the research lesson, with one team member teaching while other teachers observe and gather evidence on student learning and development.
• Debrief the notes gathered during the lesson observation and use this evidence to revise the lesson, the unit, and the teachers’ overall approach to instruction.
• Draw conclusions about instructional strategies and student learning that can drive future practice.
• If desired, teach the revised lesson in another classroom in order to study and improve on it again.

This process deepens the interaction of colleagues by developing habits of self-reflection and critical thinking. It also connects to and supports the implementation of the Illinois Learning Standards in all content areas.

Benefits of Conducting Lesson Study

Benefit One: Helps Teachers Learn to Critique and Observe

Lesson study reduces teacher isolation by encouraging members of the study to open their doors to observation and respectful, constructive criticism. A word of caution: Lesson study is not intended to focus on the habits or practices of particular teachers but instead focuses on the habits and practices that will align with expected student outcomes.

Benefit Two: Deepens Teacher Understanding of Content and Curricular Scope/Sequence

School- or district-wide lesson study can create shared knowledge, capacity and expectations of the curriculum, the standards, and goals of instruction. The practice of lesson study flips professional learning from the model of direct instruction by an individual to a teacher-driven model that is classroom-based and uses a teacher’s daily practices as the research.

Benefit Three: Increases Teacher Collaboration and Respect for Each Other
Lesson study supports educators as they strive to improve their instruction and student learning. This form of professional learning supports teacher growth in all 4 domains of the Danielson Framework:

- **Domain 1:** Lesson study connects to planning and preparation. Group members actively demonstrate their knowledge of content, pedagogy, students, and resources, and use these to set instructional outcomes and design coherent instruction.

- **Domain 2:** Lesson study allows teachers to create an environment of respect and rapport, establish a culture for learning, and in the process, lead to improved management of classroom procedures and student behavior.

- **Domain 3:** Lesson study tends to focus on appropriate questioning strategies that allow for the student to discover their own learning, which is engaging to students and demonstrates flexibility.

- **Domain 4:** Lesson study is all about reflecting on teaching, growing and developing professionally. In the process teachers, are participating in a professional community, while demonstrating professionalism.

**Benefit Four: Allows Teachers to Focus on Helping All Students Learn**

Lesson Study can be used to raise awareness of the Social Emotional Learning Standards ([http://www.ilclassroomsinaction.org/sel.html](http://www.ilclassroomsinaction.org/sel.html)). Social and emotional learning (SEL) enhances students’ capacity to integrate skills, attitudes, and behaviors to deal effectively and ethically with daily tasks and challenges. When teachers plan together to build mastery of these standards, student goals and expectations are coherent across a student’s school life. Therefore, the research lesson should be written to address some SEL standards. Lesson Study provides an excellent opportunity for educators to become more familiar with these standards and create opportunities to discuss and evaluate their use in planning instruction.

**Common Misconceptions of Lesson Study:**

1. **Lesson study is lesson planning.**
   
   Lesson study is a process that involves formulating long term goals, studying student responses to the actual lesson and revising the approach to instruction. Teachers formulate questions and activities that will move students to improve their current understanding of content to the desired understanding of the subject matter. The actual student reactions are used to revamp the lesson plan, and instructional approaches more generally.

2. **Lesson study means writing lessons from scratch while planning a rigid script to follow.**
   
   - Teachers in the lesson study group may search for available lessons on a specific topic or refine/modify/adapt lessons to their particular setting so that more time can be spent on observing student learning. This time allows teachers to anticipate student responses, study student work, and refine the lesson. The focus is on improvement, not creation.
   
   - The research lesson plan is NOT a script because every problem or question is chosen carefully so as to promote student thinking. Every step/activity is planned carefully so that the experience that students gain will help them to understand the lesson better.

3. **Lesson study is constructing the “perfect” lesson for wide spread implementation.**

   There is no perfect lesson. There is no guarantee that a particular lesson is right for all students in all schools, or that it will continue to work well with future students. Lesson study provides a means for teachers to continue to refine lessons so that they can respond effectively to the students in their class today.
4. The research lesson is created and/or demonstrated by an expert or lead teacher. Every teacher has something important to contribute. An effective lesson study should consist of both expert and novice teachers in order to learn from each other. All group members take responsibility to develop the approach and for collection and analysis of data from the students.

Lesson Study Cycle:
Research points us to cycles that provide better effect sizes when implemented appropriately. A Lesson Study Cycle (see figure 1), has specific steps that a group would encounter when conducting their study. Certain procedures and protocols should be established early on in order to provide the best possible outcomes for the group and student success.

Teams start by discussing important student learning goals—desired forms of student learning, thinking, engagement, and behavior. A lesson study typically focuses on a significant developmental learning goal that encompasses intellectual capacities, habits of mind, and qualities of character, (Cerbin & Kopp, 2011).

Figure 1: Lesson Study Cycle

Lesson Study focus should be on a learning goal: Intellectual capacities, habits of mind, and qualities of character.

4. Reflect & Plan
- Share data.
- Discuss what is noted about student learning, lesson design and content.
- Determine broader implications (i.e., data trends).
- Plan for next steps.

2. Plan
- Select or revise a lesson to use as the research lesson.
- Plan data collection and lesson implementation protocol.
- Anticipate student responses.
- Determine guidelines for observations.

3. Teach and Observe
- Conduct research lesson.
- Collect data.
- Reflect and reteach.
- Collect data after possible reteaching.

11. Set Goals
- Consider long term goals for student learning and development.
- Review district/school data that provides a challenging concept to study.
- Determine question that will be a focus of the lesson study.
- Set meeting time frames and assign roles.
Procedures for Lesson Study: The following addresses components of the cycle and protocols for implementing Lesson Study, (adapted from Cerbin & Kopp).

1. Form a group
2. Focus on the goal
3. Plan the research lesson
4. Teach and observe the research lesson
5. Discuss and analyze the research lesson
6. Reflect and plan for next steps

1. Form a group

- Form a team with 3-6 instructors. If more are interested, consider forming two groups that run simultaneously. Typically, participants are from the same discipline and often teach the same course. But, interdisciplinary teams may be appropriate when instructors from several disciplines are interested in creating a common experience for students, (e.g., freshman orientation) or when they share common learning goals in their classes, (e.g., how to conduct research).
- At the first meeting, decide who will record meeting notes and how they will be distributed.
- Determine how future meetings will be completed, (virtual, face to face, blended) and agree upon what technology will be used to disseminate communication between participants.
- Set a regular meeting time and schedule 4-6 meetings prior to when the lesson will be taught. Determine length of meetings with the knowledge that certain portions of the lesson study may take more time than others.
- Allow members to volunteer to be the primary contact for other future meetings so that the load of responsibility is shared; this participant will also be responsible for copies and reminders.
- If a guide will be used, team members should review this piece. For example, if the first meeting addresses a consistent definition of lesson study, and a schedule, this should be reviewed by all team members prior to attending. Listed in the appendix is a suggested template to be utilized.
- If data is to be retrieved on the success of this professional learning model, a pre/post questionnaire should be considered and provided to the teachers involved in order to quantify the learning objectives.
- If planning to publish the study, contact your Human Resources department about obtaining human subjects approval. Generally, this involves a signed permission form from parents with whom students in the study are involved.
2. Focus on the goal: Lesson Study Guiding Questions

This section defines the differences between a learning goal and a teaching goal. Learning goals specify student habits of mind, intellectual capacities, personal qualities—in essence what students will know, what they can do and what they will be like. Teaching goals focus on what teachers do (e.g., to explain specific content to students). The practice of lesson study involves a shift from teaching goals to learning goals—on what students learn from the lesson and how their thinking changes.

The learning goal is the backbone of a lesson and provides the “reason” for teaching and observing it. These questions can help you focus and plan your lesson study conversations. Teams also discuss subject matter—the concepts and topics—on which their lesson will be based. Many are drawn to topics that are particularly difficult for students to learn, or that are especially important in a specific course.

<table>
<thead>
<tr>
<th>Question</th>
<th>Developing Student Learning Goals</th>
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<tbody>
<tr>
<td>How does student learning, thinking and behavior develop in the lesson?</td>
<td>• What long-term qualities will the lesson support? These are abilities, skills, dispositions, inclinations, sensibilities, values, etc. that you would like students to develop.</td>
</tr>
<tr>
<td></td>
<td>• What topic will your lesson focus on? Why did you choose this topic?</td>
</tr>
<tr>
<td></td>
<td>• What specific learning goals will the lesson address? Write these in terms of what students will know and be able to do as a result of the lesson.</td>
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</tbody>
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3. Planning the Research Lesson

Lesson study provides an opportunity for teachers to benefit from one another's pedagogical knowledge. In the planning phase, team members usually begin by sharing how they have taught or would teach the lesson, discussing and debating the merits of different types of class activities, assignments, exercises and so forth. To keep the focus on student learning, though, teachers also pool their knowledge of how students in the past have learned or struggled to learn the topic at hand. Once past experiences and personal approaches are on the table, the team can begin to design a lesson that will help students achieve the chosen learning goal.

With the learning goal in mind, teachers propose instructional activities that make student thinking visible, that is, open to observation and analysis. This is essential in order for the team to see how students learn from the lesson when it is taught.

Throughout the planning process, teachers practice cognitive empathy, looking at the subject matter from the student’s point of view, working to understand how students learn. When planning the lesson, teachers try to anticipate how students will perceive, interpret and apply the subject matter and the lesson activities.

As teams plan the lesson they also look ahead to how they will study student learning when the lesson is taught. In this phase, teams identify the types of evidence they plan to collect and decide how to observe and gather evidence of student learning.
In preparation for teaching the lesson, teams think about how to collect evidence that will help them determine how students learned and their progress toward the learning goal. Teams develop observation guidelines based on their predictions of student responses and decide what types of evidence will be collected from students.

Live observation is essential as it allows instructors to follow student learning throughout the class period, note changes in student thinking and how different parts of the lesson affect students. But teams also supplement observations with additional evidence such as written work that students complete as part of the lesson.

Teams prepare “Observation Guidelines” that indicate how to observe the lesson, whom to observe, what to focus on, and how to record observations. Observers follow the guidelines to gather evidence when the lesson is taught. Evidence collected can take the form of students’ written responses to prompts or exercises, tallies or frequencies of specific type of behavior, examples of social interactions, and non-verbal behavior such as body posture and gestures. View the chart below to consider other elements that will provide evidence from the observations.

Appendix A of this document will provide a sample of observation guidelines.

<table>
<thead>
<tr>
<th>Research Process</th>
<th>Guiding Questions</th>
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<tbody>
<tr>
<td><strong>Method</strong></td>
<td><strong>Designing the Lesson</strong></td>
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</tbody>
</table>
| *How do the instructional activities affect student learning, thinking and behavior?* | • What preparation do students need to complete before the lesson takes place?  
• What instructional activities and materials will be used in the lesson? What will be the sequence?  
• How will the lesson activities make student thinking visible?  
• In what ways do the lesson activities help students achieve the learning goals? How do you predict students will respond to the lesson? |

<table>
<thead>
<tr>
<th><strong>Gathering Evidence</strong></th>
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</table>
| • What is your plan for observing students? Discuss logistical issues such as who will observe, what will be observed, how to record data, etc.  
• What observational strategies will you use (e.g., field notes, focal questions, checklists)?  
• What types of student thinking and behavior will observers focus on?  
• What additional kinds of evidence will be collected (e.g., student work and performance related to the learning goal)? |

4. **Teach and Observe**

Traditional classroom observations tend to focus on what the teacher does during the class period. Lesson study observations lessons focus on students and what they do in response to instruction. To help them perform effectively, observers should have a copy of the lesson plan, any student handouts used in the lesson, and a copy of the observation guidelines.

In this step, one member of the group teaches the lesson, and other group members attend the class to observe and collect evidence of student learning, thinking and engagement. (It is not recommended that each member of the group teach the lesson for logistical purposes). In ordinary classroom observations, teachers find themselves in the spotlight. Lesson study puts light on the students and the lesson itself, which was designed by the whole team, not a single teacher.
Many teachers make adjustments to their lessons as they teach them, responding to the needs of the moment. Minor changes are probably unavoidable, but the best situation is one in which such modifications were anticipated in the lesson planning phase. If the teacher makes major changes, then observers will find themselves unprepared to do their work and the data collected will be less valuable.

Before the actual class period, inform students about the lesson study and the observers that will be in the classroom. This is also a good time to distribute and collect informed consent forms, if there is a consideration for publishing the Lesson Study results. On the day of the lesson, introduce the observers to the class and describe what they will be doing.

5. Discuss and Analyze

Lesson study uncovers the ways that students think about the subject matter—how they interpret and construe and misconstrue specific ideas and concepts. After the lesson is taught, while it is still fresh in everybody’s minds, the team members and any outside invited observers hold a debriefing meeting to discuss and analyze the lesson. Teams may want to establish a few ground rules for the discussion, e.g., focus on the lesson (not the teacher) and on analyzing what, how and why students learned or did not learn from the experience.

The debriefing focuses on three core questions: In what ways did students accomplish the lesson goals? How could the lesson be improved? What did we learn from this experience?

During the debriefing participants offer their observations, interpretations and comments on the lesson. The purpose is to analyze and evaluate the lesson thoroughly in terms of student learning, thinking and engagement. After the debriefing, the team holds additional meetings to further organize and analyze their findings.

As a result of their analysis, teams identify ways to revise the lesson. Some teams stop at this point but typically, lesson study involves a second research cycle in which the team teaches and studies the revised lesson. Teams may also modify their strategies for collecting evidence to align them more effectively with the revised lesson.

<table>
<thead>
<tr>
<th>Research Process</th>
<th>Guiding Questions</th>
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<tbody>
<tr>
<td>Findings and Discussion What did you learn about student learning, thinking and behavior?</td>
<td>Analyzing Evidence</td>
</tr>
<tr>
<td></td>
<td>• What are the major patterns and tendencies in the evidence? Discuss key observations or representative examples of student learning and thinking.</td>
</tr>
<tr>
<td></td>
<td>• What does the evidence suggest about student thinking such as their misconceptions, difficulties, confusion, insights, surprising ideas, etc.?</td>
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<tr>
<td></td>
<td>• In what ways did students achieve or not achieve the learning goals?</td>
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<tr>
<td></td>
<td>• Based on your analysis, how would you change or revise the lesson?</td>
</tr>
<tr>
<td></td>
<td>• What are the implications for teaching in your field?</td>
</tr>
</tbody>
</table>

Analyzing the evidence usually takes place in two steps. The first is a debriefing meeting in which the team members and observers discuss their observations and second when the lesson study team meets to further organize and analyze the evidence. Teams may: 1) focus on pivotal moments in the lesson to evaluate how student thinking changed, 2) examine extremes in student performance by comparing the responses of those who struggled with those who did well, 3) develop rubrics to analyze qualitative differences among students’ responses and actions, 4) compile the results of checklists used during the
observation, 5) examine the entire sequence of lesson activities to determine how they contributed to student learning.

The team may decide that one cycle of lesson study is sufficient to accomplish their objectives or set up a second cycle. The final documents support teams with sample templates provided in Appendix A.

Appendix A: Sample Items

- Sample Meeting Schedule
- Sample Lesson Research Template to Create Lesson Study
- Sample Pre/Post Questionnaire
- Sample Observation Guidelines
- Sample Observation Checklist
- Sample Research Lesson
- Teaching Improvement Profile Template
Sample Team Meetings Schedule (Virtual)

Every lesson study has different components that may take different amounts of time to develop. A one-hour session is feasible if participant numbers are on the lower side. Some meetings may require a lengthier commitment therefore, up to 2-hour meetings might be considered. Flexibility should be considered in scheduling.

Meeting #1:

*Introduce team members*
- Share name, job title, location in the state, and one thing we love to do when NOT teaching

*Overview of technology*
- Features of agreed upon technology, (i.e., Zoom or Google Hangouts)
- Etiquette of virtual meetings (mute when not talking, participant expectations, side bar discussions, etc.)

*Introduction to Lesson Study*
- An overview of the process and protocol by viewing the following site: [http://www.lsalliance.org/clr-a-powerful-form-of-lesson-study/](http://www.lsalliance.org/clr-a-powerful-form-of-lesson-study/) or have participants read the introduction of this document.
- Share the template to be completed for Research Lesson (see Appendix A).
- Determine hosts, dates and locations for future meetings
- Determine data that will be used for analysis to support Lesson Study

*Assignment for next week* – read Chapter 6 from The Teaching Gap ([https://www.aft.org/sites/default/files/periodicals/TeachingWinter98.pdf](https://www.aft.org/sites/default/files/periodicals/TeachingWinter98.pdf)),
- Email leaders if interested in attending the lesson
- Individuals review their classroom data that supports a research theme for Lesson Study
- Individuals come prepared with a few ideas of the research theme for the Lesson Study

Meeting #2:

*Review of Learning*
- Discuss article from homework – share questions/observations
- Introduce online tool that will allow for collaborative discussion (i.e., Google Docs or Padlet)

*Meeting Focus*
- Review the data and participants share trends that might be a focus of this Lesson Study
- Discuss pros and cons of the various trends (grade level, class size, materials, etc.)
- Discuss the standards that would be appropriate for the timeline in the various classrooms, (which represents the greatest need?)

Determine the research lesson theme and standards that will be the focus of Lesson Study by answering/reflecting on the following:
- What long-term qualities will the lesson support? These are abilities, skills, dispositions, inclinations, sensibilities, values, etc. that you would like students to develop.
- What topic will your lesson focus on? Why did you choose this topic?
- What specific learning goals will the lesson address? Write these in terms of what students will know and be able to do as a result of the lesson.

*Assignment for next meeting*
- Research lesson ideas for the selected standards/theme, (review materials used in participant classrooms or search online for tools that support the predetermined Lesson Study theme)
Meeting #3:

Review of learning

Discuss shared materials

- What were the strengths and weaknesses of the various activities and lessons?
- Which ones will engage students in the Research Theme?
- What parts of the standard(s) are addressed by the materials shared?
- What parts of the standard(s) are neglected by the materials?

Meeting Focus

- Define the goals of the Lesson Study and the unit
- Begin to design/revise the lesson that will be used
  - Create/fill in the template for Lesson Study (Listed in Appendix A)
  - Include answers to the following:
    - What preparation will students need to complete before the lesson occurs?
    - What instructional activities/materials will be used?
    - What sequencing will be used?
    - How will the activities make student thinking visible?
    - How will the activities help students achieve the learning goals?

Assignment for next meeting

- Individuals predict student responses to the lesson activities
- Determine how engagement will be visible
- Determine how to differentiate lesson for all students

Meeting #4:

Review of learning

- Share the predicted responses keeping a list to determine trends that could influence student learning
- Share engagement activities and how student learning will be visible through each
- Share any differentiation/scaffolding of activities to meet all learners

Meeting Focus

- Add any new ideas to the Lesson Study template
- Finalize Lesson Study template and post to agreed upon virtual platform
- Determine how evidence will be gathered and agree upon the following:
  - Plan for observing the students: who will observe, what will be observed, how will data be recorded?
  - What observational strategies will be used? (i.e., notes, checklists, etc.)
  - What types of student thinking and behavior will observers focus on?
  - What other evidence may be collected? (i.e., student work as it relates to the learning goals)
  - Will groups of students be assigned to an observer or will observers rotate throughout the room?

Assignment for next meeting

- Create any checklists, rubrics, observation note templates and post to agreed upon platform
- Comment on these checklists, rubrics and note taking templates
- Comment on Lesson Study template
Meeting #5:

- **Review of learning**
  - As a group, address any comments that have been placed on the posted Lesson Study template

- **Meeting Focus**
  - Discuss the closure of the lesson
    - How will students demonstrate understanding?
    - How will the teacher meaningfully wrap the lesson up?
    - How will students transfer this learning to other subjects?
  - Finish any remaining components of the template
  - Verbally complete a final run through of lesson and all its logistics (i.e., encourage other participants to take on the role of students as lesson progresses)
  - Address any concerns
  - Determine schedules for opportunities to observe the lesson in action
  - Determine who will provide copies, emails, and other needs prior to the lesson presentation.

- **Assignment**
  - Prepare any documents, copies, materials needed for the Lesson Study
  - Attend the observation of the lesson

Meeting #6: Pre-Lesson Discussion (Face-to-Face) & Lesson Delivery

The day of the lesson delivery, the whole team meets 45 minutes before class begins to get organized and reviews the roles during the lesson. Further instructions and last-minute questions are addressed.

- **The Lesson Deliverer**
  - Discusses the seating chart, group organization, and room layout.
  - Student characteristics that may be pertinent to the delivery of the lesson are considered
  - Provides a copy of the lesson plan to each participant for note taking purposes
  - Follows the lesson plan developed by the team as closely as possible

- **Observers should**
  - Be “invisible.” The expectation is not to talk to students, assist students, or participate in instruction
  - Attend to their specific group or roam the room as agreed upon in Meeting 4
  - Make notes of their observations as the lesson unfolds (these target observations questions should align with the agreed upon evidence and documentation from Meeting 4)

Meeting #7: Post-Lesson Discussion (Face-to-Face)

- **Review of learning**
  - Thank the Lesson Deliverer for their time, talent, and classroom
  - Allow the Lesson deliverer to reflect on the lesson

- **Meeting Focus**
  - Conduct a robust conversation of observations that relate to the research theme. It is encouraged to discuss the actual data that was collected and aligned to the observation protocols/checklists that were agreed upon in Meeting 4. Other questions that can be considered are as follows:
Were our predicted student responses accurate?
Which predictions did not occur?
What was viewed that we had not predicted?
How deeply did students engage in the research theme?
How did the students work together to reach achieve the lesson objectives?
Did every student participate equally?
What parts of the lesson/task were successful?
What parts of the lesson/task did not go as planned?
Determine how and where final reflections will be posted (i.e., survey, template, posted to collaborative platform, etc.)

**Assignment for final meeting**
Assign participants to record reflections before the next, and final virtual meeting (*should be scheduled soon after lesson delivery day)
Reflection questions might include:
- What were the major patterns and tendencies based on the evidence?
- What examples of student thinking and learning were observed?
- Were there strong implications that suggest the lesson be changed or revised?
- How could the lesson be changed or revised?
- What large scale impact is suggested from this Lesson Study?

**Meeting #8: Final Meeting (Virtual)**

**Meeting Focus**
During this final lesson study meeting, participants work together to formulate a cohesive reflection and, if utilizing, prepare the lesson plan for publishing
Participants share their individual reflections
Edit and organize the individual reflections into one cohesive group reflection
Discuss future lesson study offerings and if anyone would be interested in facilitating a lesson study in their building/district/region
Thank everyone for their insights and participation
Provide any professional learning credits that may have been provided by district/region
Lesson Template Sample

This document has four purposes:
1) to guide the planning team through the lesson study process;
2) to help the team think clearly about their goals and their theories about how to achieve them;
3) to prepare observers to collect data, and then discuss that data, in a way that helps the team understand whether their theories are correct; and
4) to document the entire research process for the benefit of other educators.

Experienced lesson study practitioners use a variety of formats, but this template identifies important considerations of lesson study. It is based on a template originally introduced to Chicago by Dr. Akihiko Takahashi, and has been refined through several years of use by teams in Chicago and elsewhere.

Blue text briefly describes what the sections are for; all blue text should be eventually be deleted.

Lesson study is not a clean, linear process, but we recommend that you focus on sections of this document in approximately the following order:
- Research theme (3)
- Relationship to the standards (6) (start from the standards to determine what students need to learn)
- Research and kyouzai kenkyuu (8)
- Background and rationale (7)
- Goals of the unit (4)
- Unit plan (9)
- Goals of the research lesson (5)
- Research lesson (11)
- Evaluation
- Title of the lesson (1) & Brief description of the lesson (2)
- Design of the unit and lesson (10)
- Board plan (13)
- Reflection (14) (after the lesson)

Lesson Study is a more complex process than most people realize at first, and there are limitations to what can be communicated through a template. If this is your first, second, or even third time, we urge you to solicit guidance from someone with more experience (contact info@LSAlliance.org for references). We also urge you to read the article about Collaborative Lesson Research at http://wp.me/P64mnv-7S.

If you use this template and like it, or have questions, or if you have feedback for us on how it could be made better, please send us an email at info@LSAlliance.org.
Lesson Research Proposal for ___(grade & topic)

For the lesson on date
At name of the school, teacher’s name class
Instructor: name
Lesson plan developed by: names

Title of the Lesson: <a descriptive title>

Brief description of the lesson
One or two sentences about what students will do and learn during the lesson.

Research Theme
Describe the broad goals of your lesson study work. Many groups base their research theme on one or two Anchor Standards for ELA of the Common Core State Standards. The article on Collaborative Lesson Research includes some discussion about what a research theme is, and what it is for.

Goals of the Unit
Academic learning goals should describe cognitive or emotional changes within the student. Avoid “Students will be able to...” statements; instead, say what a student needs to know or understand in order to be able to.... See http://LSAlliance.org/blog/2016/05/learning-goals-describe-cognitive-change
   a) Students will understand/know that/...and thus be able to...

Goals of the Lesson:
Most lesson study teams choose a lesson early in a unit, where the foundational ideas of the unit are developed. Avoid choosing a lesson in which students will mostly demonstrate what they have learned in previous lessons.
   a) Students will understand/know that/appreciate ...

Relationship of the Unit to the Standards
This section typically describes how this unit fits between the standards from prior grades (CCSS) and the standards for this or later grades. Do not quote standards in their entirety; excerpt the relevant clauses or use strike-through to show which parts of a standard are and are not being addressed.

<table>
<thead>
<tr>
<th>Related prior learning standards</th>
<th>Learning standards for this unit</th>
<th>Related later learning standards</th>
</tr>
</thead>
</table>

Background and Rationale
Justify your choice of theme and topic. Why is it important for you to devote so much effort to researching how to teach this topic? Frequently this is expressed in terms of a contrast between the current state of students (or students in previous years) and what you and your colleagues want to accomplish.

Research and Kyozaikenkyu
Describe relevant findings from looking at various curricula and any other resources. Aim for a balance between quoting large blocks of text and just giving a link to a website. What did you look at that shaped your thinking about how to design this unit and lesson?

Unit Plan
Succinctly shows how the research lesson fits into a larger unit. Helps the reader, and observers, understand the condition of students coming into the lesson (what they have learned and experienced
recently) and what skills or concepts will be addressed later. Units vary in length, but a typical unit might be 10 lessons, including practice days. Indicate clearly where the research lesson falls within the unit.

Details like “bell-ringer” tasks or homework assignments should not be included unless they are important for understanding the progression of learning.

<table>
<thead>
<tr>
<th>Lesson</th>
<th>Learning goal(s) and tasks</th>
</tr>
</thead>
</table>
| 1      | **Goal:** Students know that equivalent fractions can be obtained by multiplying or dividing both numerator and denominator by the same number, and they understand why this is so based on visual models.  
**Task:** Let’s think about fractions other than 2/8 and 3/12 that are the same size as 1/4. |
| 2      | **The research lesson:** <brief description of this research lesson>  
**Goal:** ...  
**Task:** ... |
| 3      | **Goal:** ...  
**Task:** ... |
| 4      | |

**Design of the Unit and Lesson**

This section typically discusses:
- the current state of the students coming into the unit with respect to the research theme and relevant prior knowledge (as much as is not addressed in “Background & rationale”, above);
- how the research theme will be addressed during the unit;
- how the lesson has been designed to address the research theme and learning goals.

A research lesson should be developed with specific students in mind, so it is important for the reader to know something about them and how this lesson is tailored to them.

**Research lesson**

THIS SHOULD NOT BE A SCRIPT. But it should clearly communicate the team’s ideas for how the lesson will help students learn, in sufficient detail that a teacher reading this plan could adapt and teach the lesson to his/her own students.

“Anticipated student responses,” should always be included.
### Posing the Task
This section describes a problem or task as it will be presented to students. Give the exact phrasing of the *hatsumon* (key question(s)) and the specific vocabulary used.

Include any diagrams that will be presented, or any readings or other material that the students will need. Longer items can be attached at the end of this document.

Consider helping students see the relationship between the specific problem and the concepts or skills that will be learned. For example, how can coding or annotating text support analysis of a text?

Indicate here whether the problem will be written on the board, posted, handed out as a worksheet, or rewritten into student notebooks.

Examples of assessment questions for this section of the lesson might be:
- a) Do students understand the task? (if they don’t, it’s probably not a good idea to move on)
- b) Are students eager to engage with text? (not necessarily crucial, but it might be something the planning team hopes to achieve in the posing of the problem)

### Anticipated student responses
Give anticipated student responses, starting with the most likely. Indicate which ones are correct, or preferred, and incorrect. Include sample graphs or diagrams, if the reader would need them to understand.

Here the plan might describe how the teacher will handle the different student responses, especially incorrect solutions, students who get stuck, or students who finish early.

Sometimes the best way to handle a misconception is to let it go until the discussion.

Examples of assessment questions for this section of the lesson might be: Are students able to tackle the task? Do resources provided help students gain insight into the task?

### Comparing and Discussing
This section may identify which student methods should be shared and in what order, or generally how to handle the discussion.

What are the ideas to focus on during the discussion?

The assessment questions here usually focus on whether students recognize some key point, or appreciate the merits of discussion. Questions may also relate to the research theme; e.g. “Are students defending their ideas? Are they responding to each other’s ideas?”

### Summing up
This section may describe how the teacher will summarize the main ideas of the lesson. A good strategy is to look back at the opening task, to remind students of what was new or difficult about it, and ask students to talk about what they learned.

Sample:
“Does the summary accurately represent the students’ view of the lesson?” or “Can students articulate ____?”
Evaluation
This section should include questions, to be discussed after the lesson, about the effectiveness of the lesson in terms of the planning team’s research goals. It should include at least one question specific to the research theme (if you have one) and at least one about the specific content goals. For example:
   a) Did the lesson successfully promote student-to-student discussion? (i.e. the theme)
   b) Do students understand that ...? (i.e. a content goal)
Include any other questions that the planning team hopes to explore through this lesson and the post-lesson discussion.

Board Plan
Some teachers believe it is important to make visible the important ideas in a lesson by capturing them on the board. If this is a concern of your team, include here a diagram showing how work on the board will be organized. A good approach is to run a simulation of the lesson and then take a photo of the board.
(Provide your diagram or image here)

Reflection
After the research lesson, the team should write a reflection, which will normally include:
- what the team had hoped to observe during the lesson
- what was actually observed during the lesson, by the team members and others;
- major points raised during the post-lesson discussion, and the team’s own opinions;
- points made by the knowledgeable other; and
- ideas for future study.
This may be a few paragraphs in length. A good reflection makes the final document much more valuable to an outside audience.
Sample Checklist for Research Lesson

The content is fully aligned to the Illinois Learning Standards

- The lesson models good instructional practice (i.e., student centered learning, inquiry, discourse, problem-based learning, or Teaching through problem solving)

- The lesson provides opportunity to develop critical thinking skills, conceptual understanding, procedural skill and fluency, and/or application

The lesson explicitly connects to prior learning

- The lesson incorporates differentiation strategies in an effort to meet the needs of all learners

- The lesson supports teachers as they collect evidence of students understanding (formative assessment)

- The lesson supports teachers as they provide consistent, meaningful, constructive feedback to students

- The lesson has effective closure (checks for understanding, emphasizes key information, ties up loose ends, correct misconceptions)
Sample Pre/Post-Survey

The following questions could be shared through a Google document or other survey tech tool. Questions should be asked of participants prior to engaging in Lesson Study and after the study is completed.

1. I have enjoyed the lesson study. (scale 1-5, 5 being the greatest 1 being the least)
2. The lesson study pilot has affected the way I instruct. (scale 1-5)
3. Since I participated in the lesson study, my students have more effectively engaged in . (scale 1-5)
4. The lesson study pilot has affected my collegial conversations. (scale 1-5)
5. Lesson study has made me a more reflective teacher. (scale 1-5)
6. How has your participation in the lesson study pilot benefited you? (open-ended)
7. What were the challenges of working on the lesson study pilot? (open-ended)
8. If we continue to offer virtual lesson study opportunities, what do you suggest we do the SAME next time? (open-ended)
9. If we continue to offer virtual lesson study opportunities, what do you suggest we do DIFFERENTLY next time? (open-ended)
10. Are you interested in being involved in another virtual lesson study? (Yes/No)
11. Are you interested in facilitating a virtual lesson study? (Yes/No)
12. If you were to facilitate a virtual lesson study, what support would you need from the content specialists? (open-ended)
SAMPLE OBSERVATION GUIDELINES

ANNOTATING TEXT
A Lesson in an Elementary Literacy Class

The reason for having several instructors observe the class is to gather as much information about the lesson as possible. Your primary task is to observe how the students respond to the lesson and focus on how the LESSON worked. The observation focuses on how students learn from the experience and not on how the instructor teaches the lesson.

You will be observing one group of approximately 5 students throughout the class period. Please do not interact with students in your group, i.e., do not correct misconceptions, clarify instructions, give help or guidance, etc.

The learning goal is for students to read closely to determine what a text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text. Annotating text supports this learning goal by providing students with a method to support their comprehension. Students will demonstrate their understanding of annotating text by developing a definition and method with group members that will support independently annotating an assigned article. [Refer to your copy of the lesson plan for the sequence of instructional activities.]

Please take detailed notes on your group’s activity. Be on the lookout for examples where students tie their concept of annotating text to group discussion and ultimately to their comprehension of their assigned article. Be sure to note any aspects of the lesson or material that cause problems or result in fragmented understanding or misconceptions.

In addition to focusing on how students’ understanding of annotating text develops during the lesson, please also note such things as

- Describe how they developed their definitions of annotating text. Did they integrate their individual definitions? Did they simply string their individual definitions together? Did they defer to individual group member’s ideas? Did they debate the concepts?

- Student engagement in the lesson. Describe students’ level of engagement/interest in the lesson, (e.g., energetic exchange of ideas, non-participation, dutiful compliance to the task, tone of the interactions)

- Quality of group dynamics (positive and negative)—dominating members, quiet members, derailing of the process, goal-oriented, built on one another’s ideas, questioned, gave examples, clarified, etc.

- Surprises or unexpected activity that had an influence on student thinking or behavior.
Now that you have observed the lesson, please answer the following questions.

<table>
<thead>
<tr>
<th>Question</th>
<th>Totally Disagree</th>
<th>Totally Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. All members participated in the process</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>2. The group was able to stay on task during the lesson (i.e., did not derail or discuss irrelevant information)</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>3. The group seemed confused about the technical aspects of the subject matter</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>4. The group seemed confused about the concepts the lesson was addressing</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>5. The group seemed to understand the concept of annotating text</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>6. The group seemed to understand the logic of annotating text</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>7. Given your observations, what aspects of the lesson need to be changed? How could the lesson be improved?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. What aspects of the lesson should remain the same? What worked well?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please bring a completed copy of this form to the debriefing meeting where we will discuss the lesson.
Lesson Study is substantive professional work that enhances professional learning and instructional practices. The Teaching Improvement Profile Template is intended to help you write a coherent summary of your lesson study work that you could use as evidence of teaching improvement.

You can use the following template to develop a teaching improvement profile for your lesson study activities. Even though lesson study is inherently collaborative, the template allows you to tell an individual story of your experience.

Teaching Improvement Profile for (your name here)
This teaching improvement profile explains my lesson study experience during (indicate time period). Student handouts and other pertinent materials are attached in the appendix.

INTRODUCTION
In this section
1. describe lesson study briefly
2. indicate your time commitment during the academic year and describe what you did in general terms
3. refer to completed work or work in progress (e.g., Research Lesson Report, article for publication)

During ______ I participated in lesson study with (names of team members). Our group met (number of meetings) for a total of (number of hours) in fall and spring semester. In the first semester we designed and taught the lesson, collected evidence of student learning and used the evidence to revise the lesson. The second semester we repeated this cycle by teaching and observing the revised lesson, collecting additional evidence of student learning and revising the lesson a second time.

We completed a Lesson Study Report, which documents the lesson study in greater depth (see appendix).

BACKGROUND CONTEXT
In this section
1. describe the course and the lesson study topic
2. explain the rationale for selecting the topic (e.g., it’s a particularly difficult topic for students; it’s a new area of the curriculum)

The course (include a brief description and relevant information—number of students, why they take it, etc.)

We developed a research lesson on the topic of . . . We chose this topic because. . .
The rationale will be more compelling if you characterize the lesson as a potential solution to a learning problem—e.g., students do not understand X, Y or Z. It will be even more compelling if you can document the nature of the problem with observations, data, or indicate it is a well-known student learning problem in your field.

STUDENT LEARNING GOALS
In this section
1. Describe the short and long-term learning goals of the lesson. State these in terms of the knowledge, skills, abilities values, dispositions students should develop as a result of the lesson. Acknowledge that a single lesson cannot fully develop long-term goals but that it can make a contribution to their development.
2. Point out any connections between the lesson’s goals and departmental goals and objectives.

The lesson is designed to foster short and long-term learning goals. As a result of the lesson students should (be able to . . . better able to . . .).

A single lesson cannot fully develop these long term . . . (identify the long term capacities, skills, attitudes, dispositions). However, it is important to address these in individual classes.
LESSON DESIGN
In this section
1. Include a summary of the lesson plan with the approximate amount of time for each segment. Include a detailed lesson plan in the appendix.
2. Indicate who does what, e.g., The instructor explained . . . Students worked in small groups on . . . (This helps the reader get a better sense of the lesson as a teaching and learning episode.)
3. Refer to handouts and relevant materials, and include them in the appendix.

RATIONALE FOR LESSON DESIGN
In this section explain the rationale for the lesson design—how and why do the specific instructional and learning activities support the desired changes in student learning and thinking?

The rationale should explain the relationship between teaching and learning, and should focus on how students learn from the specific activities and exercises. The following examples illustrate progressively more specific and substantive explanations of student learning.

1. Students worked in groups for part of the lesson. We chose group work because it actively involves students in learning. Students who are active are more likely to learn the material. (Generic—Active Learning is a good thing.)
2. Students worked in groups for part of the lesson. The group task was designed so that students would apply course concepts to new problems. Students had the opportunity to think about how the material applies in “real life” contexts and not just as textbook information to memorize. They are more likely to think about the meaning of the ideas and not simply memorize the information. (More specific—the rationale appeals to “application” as a way to foster understanding.)
3. Students worked in groups for part of the lesson. The group task was designed so that students used course material to explain several novel examples. Group members gave feedback and suggestions about how to strengthen one another’s explanations. We chose this task because developing an explanation involves students in trying to make sense of the material and establish relevant connections among ideas. Further, feedback from other students would, if nothing else, get students to question their understanding of the topic. (More fully developed—the rationale indicates that “explanation” is a sense making activity and that feedback can prompt students to question their level of understanding. These activities can be observed and analyzed during the lesson.)

ANALYSIS OF THE LESSON
In this section
1. Describe the types of evidence of student learning you collected including: 1) observations of student learning and thinking during the lesson and 2) evaluation of student learning before and/or after the lesson.
2. Summarize the results in terms of what students learned (based on any pre and post lesson evidence) and how they learned or did not learn what was taught (based on observational evidence from the lesson).
3. Explain the results. Based on the evidence, how did the lesson support (and not support) achievement of the learning goals. Explain other “interesting” findings even if they are not directly related to the lesson goals. Discuss the significance of the results and what they mean for improving the lesson.

REFLECTION
In this section, tell the reader what you have learned from lesson study and how it has affected your classroom instruction and/or pedagogical thinking. Cite specific examples to illustrate changes in your practices or thinking.

1. Why did you become involved in lesson study? What are your teaching improvement goals?
2. Discuss specific insights about student learning that came out of the lesson study.
3. Discuss ways your teaching has changed or begun to change in terms of class planning, goal setting, classroom practices, assessment of student learning, use of assessment to improve teaching and learning, your understanding of how students learn the subject you teach.
Resources


