

## A GUIDE TO FACILITATING LESSON STUDY<sup>1</sup>

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### 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

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<sup>1</sup> Some of this material came from L. B. Easton (2009). *Protocols for Professional Learning*. Alexandria, VA: ASCD.

- 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
- 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 staking 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.