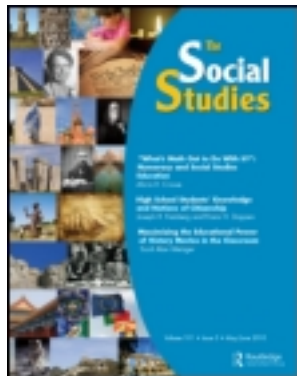


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### Lesson Study and History Education

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# Lesson Study and History Education

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This article examines the experiences of a group of fifth-grade teachers who used lesson study, a teacher-driven form of professional development, to teach history in a project supported by a Teaching American History Grant. The project addressed the following questions: What does a lesson study cycle for history education look like? What contributes to effective lesson study in history education? What are the unique challenges of lesson study in history education? Based on analyses of the teacher-designed study lessons, teachers' online journal entries, a teacher survey, videos of lessons and debriefing sessions, and field notes from lesson study observations, the article concludes lesson study in history helps teachers feel they have improved their instruction and have advanced student learning if the unique features of history instruction are taken into consideration. This study contributes to the research on lesson study by examining a relatively unexplored content area, history, and makes suggestions on how to use lesson study in history education.

**Keywords:** lesson study, social studies, U.S. history, professional development

The aim of lesson study, a teacher-driven form of professional development (PD) that originated in Japan, is to improve instruction and advance student learning. Lesson study focuses on collaborative planning, teaching, observing, and debriefing of live lessons (Lewis, Perry and Murata 2006; Stigler and Hiebert 1999). In some cases, lesson study also involves additional debriefing of the lessons in preparation for teaching them a second time (Lewis 2002). Although more commonly used by math and science teachers, recently some U.S. history and social studies teachers have adopted its use (Hubbard 2007). Many of these teachers have supported their lesson study instruction with Teaching American History (TAH) Grants (e.g., see <http://www.teachingamericanhistory.us/index.htm>; <http://teachinghistory.org/tah-grants/lessons-learned/19226>). Despite the use of lesson study in the classroom, however, there is little research documenting its effect on instruction and on student learning. Moreover, with few exceptions (e.g., Hubbard 2007), there is less research on lesson study in history (or social studies) education.

Stigler and Hiebert (1999) introduced lesson study to many U.S. educators with their book, *The Teaching Gap*, which is an analysis of teaching practices worldwide. Thereafter, as teachers began using lesson study in U.S. schools, scholars realized research was needed to analyze its ef-

fect on instruction and learning. Lewis, Perry, and Murata (2006) called for lesson study research in three areas: “(1) expansion of the descriptive knowledge base on lesson study; (2) explication of the lesson study’s mechanism [that results in instructional improvement]; and (3) iterative cycles of testing and refinement of lesson study” (3).

This article focuses on expanding the descriptive base on lesson study. We begin with a description of a “study lesson” (i.e., the lesson taught using lesson study) that was supported by a TAH Grant, “Turning Points in American Freedom.” We then analyze lesson study as a way to improve instruction and advance student learning. Our goal is to answer the following questions: What does a lesson study cycle for history education look like? What contributes to effective lesson study in history education? What are the unique challenges of lesson study in history education?

## **Context: “Turning Points in American Freedom” Teaching American History Grant**

The lesson study project described in this article took place in the second year of a three-year TAH Grant (2008–2011). There were two teacher cohorts in the project: Cohort 1, who participated in the 2008–2009 and 2009–2010 school years, and Cohort 2, who participated in the 2009–2010 and 2010–2011 school years. Four Professional Learning Groups (PLGs), each with four to six teachers, were formed (at grade levels). One teacher in each group was the “teacher leader” who oversaw the work. Cohort 1 consisted of

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seventeen teachers from various grade levels (grades 5 through 12). The four participants described in this article were the fifth-grade teachers in Cohort 1.

The TAH Grant had three primary goals: (1) to increase American history content knowledge of elementary, middle, and high school teachers; (2) to increase teachers' use of historical thinking skills, primary sources, and systematic assessment in their American history instruction; and (3) to increase the participating teachers' students' knowledge of American history content and use of historical thinking skills.

In preparation for the lesson study project, the participating teachers (from various schools) studied U.S. history in thirteen days of workshops in the first year of the TAH Grant (2008–2009). In the workshops, which were led by historians, the teachers read biographies of significant historical figures, developed their own historical thinking skills, and identified key turning points in the history of the United States. For example, the fifth-grade teachers read *Pocahontas and the Powhatan Dilemma* (Townsend 2004) to learn about Pocahontas's public life and symbolic place in U.S. history, to evaluate the credibility of the sources Townsend used in her biography, to gain a deeper understanding of the times in which Pocahontas lived, and to identify a "historical turning point" in her life. The teachers also learned to design document-based exercises in which students use primary sources to construct an understanding of the past (see, e.g., <http://www.dbqproject.com/>).

In the second year of the TAH Grant (2009–2010), as the teachers prepared for their lesson study project, they participated in thirteen PD workshops on curriculum design led by four pedagogical consultants (the authors were two of the consultants). The consultants' role in the PLGs was to answer questions, raise issues, and provide resources. In these workshops the teachers developed and taught lessons based on their recently acquired history knowledge and historical thinking skills as well as additional historical study. They then taught and retaught the lessons in two cycles to students in their classrooms. The lessons focused on the following historical thinking skills: inquiry, perspective, explanation, interpretation, and presentation.

Using the five-step lesson study process, the teachers planned, taught, and evaluated their lessons. The five steps in this process are the following: (1) the teachers co-plan a lesson; (2) a teacher teaches the lesson; (3) the teachers debrief (and usually revise) the lesson; (4) another teacher reteaches the lesson; and (5) the teachers debrief the re-taught lesson.

In their PLGs the teachers set goals for the lessons and planned the instruction in a summer workshop in 2009. They taught Cycle 1 of the lesson in October/November of 2009. Goal setting and planning for Cycle 2 of the lesson took place after the lesson was first taught. They then taught Cycle 2 in February of 2010. The teachers observed lessons they did not teach, and all participated in the post-lesson debriefing sessions in which the lessons were dis-

cussed and revisions were considered. A pedagogical consultant and the project director also observed the lessons and participated in the debriefing sessions using a Lesson Study Protocol (see Chokshi, Ertle, Fernandez, and Yoshida 2001).

This article describes the fifth-grade teachers' lesson study project in Cycle 1. The data are the teacher-designed study lessons, videos of the lessons and debriefing sessions, the consultant's and project director's field notes, teachers' online journal entries completed during the professional development workshops, and a survey of teachers' experiences in the project.

### The Fifth-Grade Teachers' Lesson Study

We next describe the Cycle 1 lesson that the fifth-grade teachers planned, taught, and reflected on using the framework of the five-step lesson study process. We examine what these teachers learned that they thought would improve their history instruction and would advance their students' learning. Four teachers (Tess, Molly, Theodore, and Kendra) participated in this lesson study cycle: Tess taught the lesson in the morning, Molly retaught the lesson in the afternoon, and Theodore and Kendra were observers of both lessons. A pedagogical consultant and the project director also attended the lessons and the debriefing sessions, all of which were digitally video recorded.

The topic of the fifth-grade lesson was the Atlantic Slave Trade between Africa and the American colonies. The lesson's goals were to increase students' knowledge of the Middle Passage of the Triangular Slave Trade and to develop their historical thinking skills of inquiry and interpretation (National Center for History in the Schools 1996; Wiggins and McTighe 2005). The lesson was the first lesson in a history unit on slavery and the slave trade.

The teachers planned the lesson in the summer workshop, several months before they taught it. This planning workshop was a rare luxury for the teachers: they had four days to design four lessons, and they had the benefit of group collaboration. The teachers selected the Atlantic Slave Trade as the lesson topic for two reasons. They thought the knowledge and skills acquired in their study of Pocahontas would help them describe and analyze the relationship between the European settlers and the African slaves. They also had a special interest in improving their instruction on the Atlantic Slave Trade.

The planning workshop was intense because the topic of the slave trade was profoundly disturbing and because they had conflicting ideas on how to teach it. They thought it was important for students to connect with the subject, both emotionally and intellectually. They wanted the students to use empathy to "make sense" of the historical evidence (Davis, Yeager, and Foster 2001) and to feel compassion for the slaves. Yet they also wanted the students to understand the causes of institutionalized slavery (e.g., its economic

rationale). Ultimately, they decided the most important objective of the lesson was to teach students to distinguish between factual information and historical interpretation; in short, to distinguish between “fact” and “opinion.” The consultant asked the teachers to consider whether this differentiation between fact and opinion achieved the larger goal of developing students’ historical thinking skills. The teachers concluded their lesson would achieve this goal.

In September, following the summer planning workshop, the teachers refined the study lesson, gathered additional resources, reviewed the procedures for lesson study, and determined who would teach the lessons and when. Theodore assembled the multimedia resources and distributed them using the course management system used in the TAH Grant (the project director had developed a standard format for all lessons that was available through the course management system, and all teachers could access all lessons from the system). In the revised format the lesson would begin with a multimedia presentation on the Atlantic Slave Trade prepared by the teachers (one image was a drawing of a slave ship hold; see Figure 1). Teachers of the lesson would ask students to watch the presentation and then write sticky notes about their observations (this request was open-ended and intended to provoke a range of student responses). Next, teachers would explain the difference between fact and opinion. Facts are provable, supported by evidence; opinions are beliefs, unsupported by evidence. The students would then be instructed to post their sticky note statements as either “facts” or “opinions” on a T-chart (a two-column organizational tool used for making comparisons). As a group, the students then would discuss similarities and differences in their conclusions.

### Teaching the Lesson

Tess first taught the study lesson in the morning as the other teachers, the consultant, and the project director observed. They took field notes on Tess’s “instructional moves” (e.g., her questions and comments to individual students and to the whole class) and the students’ responses. She followed the lesson plan closely until she reached the whole class discussion in which students explained whether their statements were fact or opinion. Then difficulties arose. Tess could not tell if the students really understood the difference between fact and opinion. The students who classified their comments as facts often lacked supporting evidence.

Many students, referring mainly to the slave ship drawing in the multimedia presentation, had written sticky note statements that they confidently placed in the facts column. In discussion, these students said the images showed slaves (therefore, their statements were facts). However, relying only on this drawing, they could not prove the people on the ship were slaves (they could have stated as fact that “the people have dark skin”). Explaining opinions to the students was also difficult. Tess thought she could help

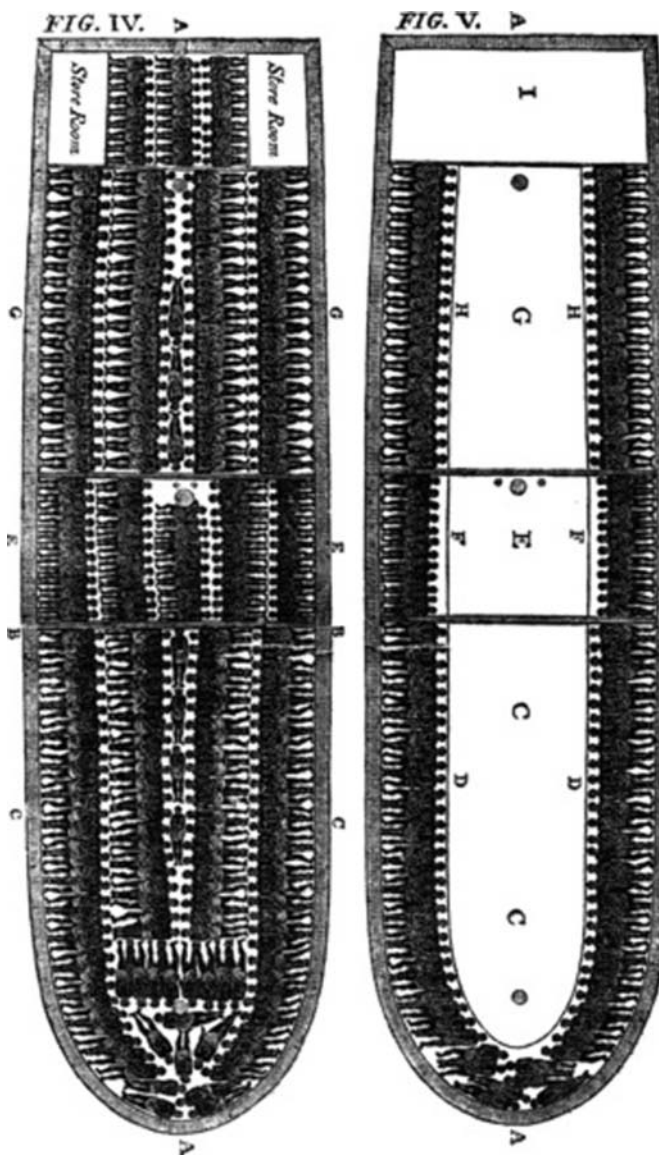


Fig. 1. Drawing of a slave ship. <http://immigration.procon.org/view.resource.php?resourceID=002690>

students identify opinions by pointing out that statements beginning with “I think” were opinions. However, some students said some of their opinion statements did not begin with this sentence stem. There seemed no clear way for students to differentiate between fact and opinion. Faced with this difficulty, Tess introduced two improvisations in the lesson. First, she did not discuss all of the sticky note statements. Second, she began a discussion with the students on their thoughts about the slaves’ conditions on the ships.

On one level the lesson was successful in that students learned some of the history of the Middle Passage, especially the conditions (cruel treatment, disease, and starvation) of the Africans shipped to the New World. However, on another level the lesson had fallen short of meeting its

goal because students had not learned to distinguish between fact and opinion. The lesson had not advanced the students' historical thinking skills, which was a primary goal of the lesson as well as one of the goals of the TAH Grant.

### Debriefing the Lesson

Following Tess's lesson, the teachers, the consultant, and the project director met in a forty-five-minute debriefing session to reflect on whether the lesson met the goal and any necessary refinement of the lesson for its reteaching. The consultant was specific in reminding the teachers that in such sessions they should reflect on the lesson itself, not on the teacher who had taught the lesson. The teachers, including Tess, recognized the problems were in the design of the lesson. On the basis of their observations of the lesson and the students' statements (in particular, any patterns in students' responses), they saw that the lesson hadn't really "worked." Yet for logistical purposes, they were reluctant to make dramatic changes in the lesson. Because Molly would teach the same lesson in the afternoon, it was neither possible to make major changes in the lesson nor to collect additional historical resources.

The teachers knew it was necessary to address the fact versus opinion difficulty in the lesson, but they were unsure what to do. The teachers reread the students' sticky notes to try to detect patterns in the responses. As they discussed the problem and examined the student data, they realized that the students could, however, distinguish between observations and interpretations. A student statement such as "there are slaves" was an interpretation. A student statement such as "there are people packed tightly together on a ship" was an observation. This observation versus interpretation distinction seemed a better way to teach historical thinking skills to students than the fact versus opinion distinction. It is the nature of historical thinking that different interpretations may be based on the same observations. The teachers had reached this understanding of reasoning about past events in teaching the Middle Passage lesson. They had expanded their own historical thinking skills. It is interesting that the fifth-grade students' struggles with distinguishing between fact and opinion helped teachers to make this intellectual shift. On the one hand, the teachers struggled with "abandoning" what they thought was the crux of their lesson: fact versus opinion. On the other hand, when they saw the potential for an improved lesson, they became enthusiastic about the changes. The teachers took notes on these changes, reviewed them, and implemented them in the revised lesson plan.

After the debriefing and before the second teaching of the lesson, the teachers then went to lunch. Much of the lunchtime conversation continued the discussion of the morning's lesson. Teachers talked about the fact that their

students may need practice in making observations and interpretations before applying this skill to the images in the multimedia presentation. Molly suggested that showing the students a photograph of an unemotional subject, unrelated to the lesson topic, could be useful. The other teachers agreed that teaching the new skills of making observations and interpretations might be more successful by studying more familiar content, so students were not learning new content and new skills simultaneously, which scholars such as Alleman and Brophy (1993) discourage. Molly then went home and returned with a black-and-white photograph of her grandmother, taken some years before.

### Reteaching the Lesson

At the beginning of the lesson, Molly showed the students the photograph of her grandmother. She told them that in making an observation, you describe what you see and begin with the sentence stem, "I see." In making an interpretation, you draw a conclusion about what you see and begin with sentence stem, "I think." The students observed that the photograph was black and white and the woman pictured wore old-fashioned clothes; they interpreted that the photograph was from the past. This simple activity better prepared the students for the Middle Passage multimedia presentation and for the activity of distinguishing between observation and interpretation that followed.

Then Molly continued with the lesson. The only difference from Tess's lesson was that the two columns in the T-chart were relabeled as "observation" and "interpretation." Most students posted their sticky note statements in the interpretation column. Molly then read a selection of statements and asked students for supporting evidence in deciding whether the statements were labeled correctly as observation or interpretation. Molly used the wording, "Let's find evidence to support that." For example, one student used the word "trapped" in her statement that she said was an observation about the living conditions on the ships. Molly helped the students understand that "trapped" was an interpretation. When Molly asked, "What evidence do you have that they are trapped?" some students replied, "the people had shackles on them" and "the people were squished together in tight quarters." Molly pointed out these explanations were observations, not interpretations. Similarly, she led the students to understand that statements such as "they look dark-skinned" and "they don't look properly clothed" were observations, not interpretations. Molly also asked, "Now what would change this from an observation to an interpretation?" In this way, she encouraged the students to use historical thinking skills by using observations to make interpretations.

Then Molly explained the importance of distinguishing between observations and interpretations. She said: "We don't have all these people in the room with us. We don't



**Fig. 2.** The second debriefing session.

have a way to interview them and get their story. But we do have pictures and documents that we can interpret.” She emphasized that interpretations should be based on observations. In the debriefing session following Molly’s lesson, the teachers said the retaught lesson was more successful in teaching the historical thinking skill that was its goal. The photograph activity prepared the students for the Middle Passage activity. The students understood the concepts of observation and interpretation better than they had the concepts of fact and opinion. One of the teachers, Kendra, stated:

We figured out that changing our lesson from having the students evaluate fact versus opinion to observations versus interpretations made the lesson so much more powerful. When Molly implemented the change in the second lesson, I felt the lesson flowed much more easily . . . [Students] really seemed to understand that observations were those things that they could see in the documents but that they may use those observations to make interpretations.

The teachers saw that the students in Molly’s lesson had acquired an important historical thinking skill: distinguishing observation from interpretation. They had achieved this goal by following the five-step lesson study process of planning, teaching, debriefing, reteaching, and rebriefing. A conversation from the second debriefing session is shown in figure 2.

### What Contributes to Effective Lesson Study in History Education?

The teachers in this study stated that the process of lesson study improved this particular lesson, as well as their approach to teaching history more generally. Our analysis of the debriefing session and teacher interviews revealed three themes that shed light on what teachers stated made lesson study in history education effective: (1) Teachers must have a good working relationship; (2) Teachers must commit to lesson study and to curriculum design; and (3) Teachers must agree that reflection is a useful tool for improving

lessons. We next explain these themes in the context of the fifth-grade teachers’ study lesson on the Middle Passage. We note that these themes are not unique to history education and are applicable to other subjects.

**Theme 1:** The fifth-grade teachers stated that it was essential to have a good working relationship as they planned, taught, debriefed, and revised the lesson. They said trust was the most important element in their relationship, although they also mentioned cooperation, mutual respect, camaraderie, and patience. For example, Theodore said: “Knowing each individual and appreciating what they bring to the group is crucial.” Other teachers added that everyone should participate actively in all phases of the lesson study. They understood that teachers engaged in lesson study cannot be passive participants. Researchers have noted the idea that a harmonious working relationship among teachers in a group is necessary for the success of lesson study (e.g., see Lewis 2000; Puchner and Taylor 2006). We add that such relationships may have even greater importance for lesson study in history classes because of the special challenges the discipline poses (discussed in the next section).

**Theme 2:** The fifth-grade teachers acknowledged lesson study was challenging and, at times, frustrating. If lesson study is to be effective, and to make their time and effort commitment worthwhile, teachers must be convinced lesson study leads to improvement in instruction and advances in student learning. The fifth-grade teachers said that this commitment to the lesson study process and to the curricula design is essential for successful lesson study. Theodore stated: “Through observation, collaboration, and reflection we [made] good lessons great.” The teachers also recognized that they have to take ownership of the lesson as “their” creation. Tess explained: “The study lesson has to be one that the group developed together so they are invested in it. Then the group will feel comfortable using lesson study to analyze and critique the lesson, not the teacher.” The consultants may make suggestions, direct the discussion, and ask questions, but the teachers are ultimately responsible for the lessons.

**Theme 3:** The fifth-grade teachers were familiar with the process of, as well as the need for, reflection in teaching, but group reflection as a powerful way to improve instruction was new to them. Kendra stated: “I learned a lot about the whole process of doing the lesson. [Figuring] out what is wrong with it and then fixing it with people is a lot easier than doing it by myself. It is nice to have other points of view and different eyes to help with the process.” They recognized that such tasks are often difficult because of the work already invested in the lesson and because intragroup tension and conflicts may arise when criticism, however constructive and objective, is offered. Overall, however, the teachers thought that the debriefing sessions were productive. Tess said: “. . . after we started analyzing [the lesson] and referring back to our objectives, weak areas became

clear. We made . . . great changes that helped the lesson. The second lesson flowed better and stayed true to our objectives.” Molly said: “What a luxury! The lesson was overplanned to begin with—and then to have the opportunity to review it with expert minds . . . and tweak it? Wow!”

### The Unique Challenges of Lesson Study with History Education

Lesson study in history education poses special problems that are less commonly found in other disciplines such as the natural and physical sciences. According to Scott (1998), scientists, more than historians, have consensus-seeking habits of mind. However, while historians may sometimes agree on “facts” (e.g., historians agree Abraham Lincoln was assassinated on April 14, 1865), they often have conflicting interpretations of the causes and meanings of agreed-upon facts. They rely on different data sources, different analytic techniques, and different theoretical perspectives. Elementary school teachers, like the fifth-grade teachers in this study, are not historians, but they face some of the same challenges historians face in teaching history. The principal challenge is there are many, often conflicting, ways to view the past. History teachers have to deal with controversies, often heated, on the appropriate content of history education (Evans 2004; Symcox 2002) and on the “facts” of history. Molly described history as follows: “a very fluid subject matter that is subjective and always changing. It is open to many interpretations.”

Depending on their education, experiences, and political views, to name a few factors, teachers may view history instruction quite differently. Teachers’ personal histories may influence how they teach history. For example, Wilson and Wineburg found that teachers’ disciplinary backgrounds (e.g., anthropology, economics, or history) frame their approaches to teaching history (Wilson and Wineburg 1988; Wineburg with Wilson 2001). It is quite probable, and likely laudable, that the teachers in a group will disagree on what and how to teach the same lesson. However, for lesson study, complications arise because the hallmark of lesson study (and in particular, the form of lesson study with the reteaching component) is uniformity of content and method. The interpretative nature of history must be considered when using lesson study with history lessons.

### Conclusion

This study contributes to the literature (at present, rather scant) on lesson study in history education by its description of four fifth-grade teachers’ experiences with and thoughts on lesson study as they taught U.S. history. Their goal was to improve their instruction and to advance their

students’ learning. Our research shows that teachers believe lesson study can be a highly effective form of teacher-generated PD because it gives teachers autonomy and flexibility in the design of lessons, as well as valuable opportunities for group collaboration and reflection on their practice. We also found that history instruction presents special challenges in lesson study. As such, the lesson study model developed and used most often in math and science education needs to be modified for history (and for social studies education). A “one-size-fits-all” approach to lesson study has weaknesses.

A limitation of this study is that it only examines the fifth-grade teachers’ practice from their perspective. Our findings on history lesson study are based on their comments on the successes and shortcomings of their experiences. An alternative approach would be to evaluate history lesson study using researcher observation of teachers’ practice and student learning. The project director and consultants did observe the lessons but did not have a tool for systematically evaluating instructional practice. We suggest that a systematic evaluation of the relationship between sustained participation in lesson study and improvement in instruction and advances in student learning in history education is needed.

Our claim is that this research highlights teachers’ beliefs in the effectiveness of lesson study in history. Our research also draws attention to the need for more studies of history lesson study as well as of PD programs in history instruction. The unique features of history (i.e., its broad and interpretive nature) need to be considered, however. We believe there is great promise for lesson study in history education. One of the fifth-grade teachers summarized the value of lesson study. Tess wrote that lesson study “is a huge value and is the best kind of professional development for any teacher.”

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