# Instructional Planning Tools Collection

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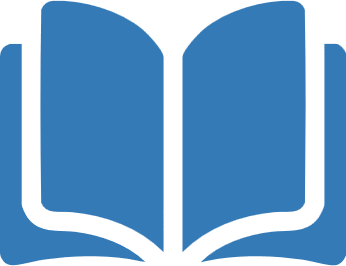
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## About the Tools Collection

The Instructional Planning Tools support continuous improvement of evidence-based practices that are inclusive and culturally and linguistically sustaining, to advance the student goals of the DESE [Educational Vision for Massachusetts](https://www.doe.mass.edu/commissioner/vision/default.html):

| As a result of their public educationin Massachusetts, students will: | What it lookslike in a classroom: |
| --- | --- |
| * Attain academic knowledge and skills. * Understand and value themselves and others. * Engage with the world. | * All students are known and valued. * Learning experiences are relevant, real world, and interactive. * Individualized supports enable students to excel at grade level and beyond. |

Use of planning tools promotes educational equity and deeper learning through [effective educator practice](https://www.doe.mass.edu/edeffectiveness/standards/default.html). The four Instructional Planning tools – Unit Unpacking, Lesson Internalization, Student Work Review, and Classroom Observation – are designed to support instructional planning and skillful implementation of high-quality instructional materials. These tools foster critical thinking, reflection, and planning by guiding educators through the *what*, *why*, *how*, and *so what* of teaching and learning, to promote positive outcomes for all learners.

Infographic: showing four stages of the planning cycle, each represented by a box with an icon and text about when to use the tool and key guiding questions. In the middle of the four boxes is a triangle representing the "Instruction Core" -- the triangle is made up of 3 parts labelled students, content, teacher, with an icon and the words "Instructional Task" in the middle


Infographic text:

Title: Instructional Planning Cycle Tools

Tool/Stage: Unit Unpacking 
When to use: Prior to teaching a curricular unit 
Key Questions
1. What are students learning in this unit and why? How will we know they have learned it? 
2. How does this unit recognize, center, and affirm diverse identities, perspectives, and experiences?
3. How can our facilitation of this unit cultivate deeper learning and increase all students’ capacity as independent learners? 

Tool: Lesson Internalization 
When to use: Prior to teaching a lesson 
1. What are students learning in this lesson and why? How will we know they have learned it?
2. How does this lesson recognize, center, and affirm diverse identities, perspectives, and experiences?
3. How can our facilitation of this lesson increase all students’ capacity as independent learners to cultivate deeper learning? 
4. How will students experience this lesson?

Tools: Classroom Observation
When to Use: During instructional activities
1. What is the interaction between teacher (mindset, knowledge, skill, practice) and student (engagement, ownership) in the presence of content (grade level or beyond, relevant, real world, interactive).
2. To what extent are all students experiencing deeper learning?

Tool: Student Work Review 
Instructional Planning Tools Cycle Infographic

Infographic showing four boxes arranged a circle/cycle. They start with the Unit Unpacking Tool and finish with the Classroom Observation Tool. The text in each square reads as follows:

Tool/Stage: Unit Unpacking 
When to use: Prior to teaching a curricular unit 
Key Guiding Question:How do I plan for deeper learning?

Tool: Lesson Internalization 
When to use: Prior to teaching a lesson
Key Guiding Question: How do I facilitate deeper learning?

Tool: Student Work Review 
When to use: After teaching a lesson and/or concluding a unit
Key Guiding Question: What ideas and concepts did students learning deeply?

Tool: Classroom Observation
When to Use: During instructional activities
Key Guiding Question: To what extent are all students experiencing deeper learning?

In the middle of the four boxes there is a triangle representing the instructional core. 3 shapes representing content, teachers, and students make up the 3 parts of the triangle. In the middle of  is an icon of students learning with text that says "Instructional Task".


## Key Considerations

1. **Instructional Planning Tools:**
   * These tools support skillful implementation of instructional materials, to ensure students engage in deeper learning through equitable access to grade-level, real-world, interactive, and relevant work.
   * They are **not** for creating instructional materials or replacing lesson planning. Instead, they structure discussions to deepen effective practice, strengthen cross-team alignment, and aid skillful implementation.
   * They are best used with high-quality instructional materials. Refer to [CURATE](https://www.doe.mass.edu/instruction/curate/default.html) reports for guidance, or discipline-specific [CURATE rubrics](https://www.doe.mass.edu/instruction/curate/rubrics-resources.html) and content area staff where reports or rubrics aren’t available.
   * They support phases three and four of [Curriculum Matters: IMplement MA](https://www.doe.mass.edu/rlo/instruction/implement-ma-process/story.html) (Launch and Implement & Monitor) and aid educators’ [curriculum literacy](https://www.doe.mass.edu/instruction/impd/curriculum-literacy.docx) to enact and adjust practice.
2. **Shared Vision:** These tools are most effective when teachers and instructional leaders share a vision for effective instruction. The [Standards of Effective Practice](https://www.doe.mass.edu/edeffectiveness/standards/default.html), [Classroom Observation Tool](https://www.doe.mass.edu/kaleidoscope/planning/protocols/default.html), and [Deeper Learning Guidance Tool](https://www.doe.mass.edu/kaleidoscope/planning/tool.html) can help align on components supporting the Educational Vision.
3. **Ongoing Professional Learning:** These tools should be part of an ongoing professional learning cycle (i.e., observation, reflection, feedback, coaching).
   * Teams may need to strategically decide how much time to spend on each section of the tools and where additional learning is needed, based on school/district priorities, student assets and needs, teacher expertise, and time allotted.
4. **Tool Usage:**
   * The Unit Unpacking tool and the “Team Deep Dive” versions of Lesson Internalization and Student Work Review tools are best used as a team with a predetermined facilitator and with grade-level specialists (e.g., Special Education, ESL, interventionists).
   * The “Every Day” versions of the Lesson Internalization and Student Work Review can be used independently for daily practice.
5. **Pre-Work:** Before using these tools, educators should understand the broader goals, scope and sequence, and routines of their course and curriculum.
6. **Note-Taking:** Educators should take notes in a way that supports understanding and implementing action steps (e.g., on unit materials, in a notebook).

## Guidance for Facilitators

To prepare to effectively facilitate Unit Unpacking, Lesson Internalization, Student Work Review, and Classroom Observations with teams of educators, facilitators should:

* Read the tool. Jot notes on how you would answer each question or look for.
* Determine how much time to spend on each section of the tool and where your team might need additional time or learning, based on school and/or district’s priorities, student assets and needs, the expertise of teachers participating, trends from recent classroom observations and/or student work, and the time allotted.
* Ensure all team members have access to necessary materials.
* Share prework with participating educators.

## Tool-by-Tool Guidance

### Unit Unpacking Tool

#### Key Guiding Question

*How do I plan for deeper learning?*

#### Tool Purpose

* Establish a clear vision for the student learning experience throughout the unit.
* Identify the goals and targeted content, language, and practice standards of a unit.
* Plan for student access, engagement, and individualized support.
* Reflect on and mitigate adult biases.

#### Facilitation Notes

* Ensure all team members have access to unit materials, including core texts, assessments, and exemplars.
* Consider any school or district-level priorities that should inform the team’s focus within the tool.
* Determine the unit assessment or culminating task that the team will analyze in Step 3.

**Note:** In this tool, we use the term “assessments” broadly, to refer to the moments in a unit when students are asked to demonstrate their mastery of knowledge and skills. This might include both formative and summative assessments such as tests, performances, writing tasks, projects, and/or designs.

* Assign a note-taker to capture notes and next steps.

#### Prework for Participating Educators

* Read through the unit materials, including all core texts, lesson overviews, and major unit assessments or culminating tasks.
* Read/Review the exemplar(s). If not yet available, consider what the culminating unit assessment or task would look like if completed at the depth and grade level of the content and practice standard(s), with alignment to the WIDA Key Language Uses. *What are the components of a successful response and/or product?* Reference grade-appropriate English language development standards (WIDA).

### Lesson Internalization Tool

#### Key Guiding Question

*How do I facilitate for deeper learning?*

#### Tool Purpose

* Internalize and intentionally prepare to facilitate standards-aligned lessons and tasks for all learners.
* Engage all students in daily learning experiences that are grade level, real world, relevant, and interactive.
* Leverage evidence-based practices that are inclusive and culturally and linguistically sustaining, to ensure all students are engaged in critical thinking and are held to high expectations.

#### Facilitation Notes

* Support the team in identifying a lesson to collaboratively prepare to teach. When choosing a lesson, consider which lessons engage students with the major thinking of the unit. You might select one based on:
  + Opportunities for students to do the heavy lifting connected to the objectives of the unit.
  + Ongoing areas of growth and/or challenge based on classroom data (e.g., observation, assessments, etc.).
  + Clear connections to other learning (e.g., a prior unit from your class, an ongoing unit in another class, etc.).
* Ensure all team members have access to lesson materials, including core texts and exemplars.
* Consider any school or district-level priorities that should inform the team’s focus within the tool.
* Assign a note-taker to capture notes and next steps.

#### Prework for Participating Educators

* Read through the lesson materials, including all core texts and lesson plan documents.
* Review the target task of the lesson (i.e., where students demonstrate mastery of the lesson’s objectives) and read the exemplar(s) if available.
* If an exemplar is not yet available, consider what the task would look like if completed at the depth and grade level of the content and practice standard(s).

### Student Work Review Tool

#### Key Guiding Question

*What ideas and concepts did students learn deeply?*

#### Tool Purpose

* Assess students’ progress, strengths, and opportunities for growth based on grade-level content, language, and practice standards.
* Reflect on and shift instructional practice.
* Determine next steps to support student learning.

#### Applying an Equity Lens for Reviewing Student Work

When reviewing student work, it is important to recognize that everything students share provides valuable insight into students’ thoughts and makes their thinking visible to others.

To best support student growth and inform future instruction, analyze student work by first identifying trends in overall understanding before delving into specific areas of concern. This approach helps us understand the instructional decisions that led to these trends, fostering a focus on improvement rather than assigning blame.

When using the tool, consider the following:

1. Analyze student work through an asset-based lens; keep students’ strengths at the forefront.

* Move beyond reviewing student work with a “got it” and “didn’t get it” mindset to one of curiosity to “figure it out” across performance levels and student groups.
* Analyze your own and others’ implicit biases and assumptions.
* Question the role of your own values and beliefs.
* Be open to gathering and analyzing additional data / information to develop a comprehensive analysis.

1. Ensure that the set of student work is representative of a diverse set of students (i.e., students with disabilities, English learners at varying levels of English language development, advanced, etc.).
2. Know your students’ skills, language, and content understandings well so you notice data that doesn’t “fit.”

#### Facilitation Notes

* Support the team in identifying student work for review.
* Support the team to apply an asset-based approach in analyzing student work.
* [Suggested] Print copies of student work for each team member.
  + To mitigate bias, remove student names and avoid including demographic information or performance levels.
* Assign a note-taker to capture notes and next steps.

#### Prework for Participating Educators

* Select a class set of the student work from a) a lesson/task you created an exemplar for during the Lesson Internalization process, b) a mid-unit assessment, or c) the end-unit assessment you unpacked through a Unit Unpacking process.

**Note:** Student work can include written responses, videos of student-created performances, explanations, models, or investigations.

* Revisit grade-level learning goals by reviewing your Unit Unpacking and Lesson Internalization notes.
* Share the rubric/criteria for success and any available exemplars, including those for different English language development proficiency levels (WIDA).
* Briefly review the student work provided.
* Review any additional data provided by your facilitator for team “deep dive” discussions.

### Classroom Observation Tools

Observation tools facilitate educational equity and [deeper learning](https://www.doe.mass.edu/kaleidoscope/overview.html) by supporting [effective practice](https://www.doe.mass.edu/edeffectiveness/standards/default.html), like regular observation, reflection, feedback, targeted professional development, and coaching.

The following observation tools have been developed to provide educators options based on their classroom observation focus:

1. Content-Agnostic Classroom Observation Tool
2. Early Literacy (PreK-3) Observation and Feedback Tool
3. Multilingual Learning Look-For Tool

#### Tool Purposes

Use of the observation tools can serve and support a variety of learning and growth-oriented instructional purposes:

* Build a common understanding, language, and vision of effective teaching and deeper learning.
* Foster educator reflection towards a unified vision of effective instruction.
* Aid in planning coaching conversations (e.g., effective practice, goal setting, feedback, etc.)
* Set structures, priorities, and goals for various teams (e.g., teachers discussing actions that foster specific student actions grounded in effective practices, coaching teams focusing on student-centered strategies, administrators calibrating on instructional “look-fors,” and district teams setting measurable goals for walkthroughs).
* Surface trends across classrooms and schools through regular progress monitoring walkthroughs, to inform school and district strategic actions, to advance the instructional vision.
* Inform data-driven decisions to strengthen systems and practices that promote educational equity, consistency, and coherence (*Related Resource*: [Coherence Guidebook](https://www.doe.mass.edu/csdp/guidebook/default.html)).

Observation tools can be used for monitoring progress within and across schools as part of regular progress monitoring walkthroughs. The provided “look-fors” are illustrative examples – not a checklist – and are not exhaustive. (*Related Resources*: Classroom Walkthrough guidance in the next section).

#### Observation Role Considerations

An individual educator’s role when participating in a classroom observation often informs their instructional lens, purpose, goals, and specific before, during, and after classroom observation actions. Below are suggested considerations for primary purposes and goals based on participant roles:

n *Colleague*

* Support your own professional learning and development through collaboration, calibration, and reflection.

n *Coach*

* Support teacher development and growth in implementing evidence-based practices that are inclusive and culturally and linguistically sustaining to foster belonging and promote equity for all students.
* Inform school-based administrator actions towards improving student learning experiences, academic achievement, and outcome goals, coherent with the instructional vision.

n *School-Based Administrator*

* Develop understanding of teaching and learning in your school aligned to the instructional vision, to support teachers and instructional leaders (e.g., coaches, teacher-leaders, department heads), continuous improvement, and equity for all students.

n *District Administrator*

* Gain insight into the instructional systems, structures, processes, and practices that shape the district and schools’ culture of teaching and learning.
* Inform systemwide monitoring and strategic decision-making on the student, teacher, and school administrator supports and resources needed to advance the district’s equity-centered instructional vision and goals.

#### Additional Observation Tool Facilitation Guidance

| **Tool** | **Facilitation Notes** |
| --- | --- |
| Content-Agnostic Classroom Observation Tool | Key Guiding Question   * *To what extent are all students experiencing deeper learning?*   This tool includes effective instructional practices that support student learning and growth, **observable** in every lesson and **every day** across content areas.   * The addendum to the classroom observation tool provides look-fors that are specific to these content areas/disciplines or educational programs: Arts, Comprehensive Health and Physical Education, Career Connected Learning/Pathways, Digital Literacy and Computer Science, History and Social Science, Mathematics, Science and Technology/Engineering, and World Languages.   + Content-specific questions support observers to contextualize the observed lesson within the larger arc of learning and goals of the unit, project, or performance the lesson is advancing. * Refer to the [What to Look for Observation Guides](https://www.doe.mass.edu/frameworks/observation/) for specific content knowledge and skills students should be developing at each grade level. |
| Early Literacy (PreK-3) Observation Tool | Key Guiding Questions   * *What is the evidence-based systematic scope, sequence, and approach to early literacy development in which the foundational skills instruction is rooted?* * *In the observed lesson, how is explicit instruction and active practice of the foundational skill supporting students to develop language and literacy, and promoting fluent word reading and language comprehension?*   This tool helps observers identify and provide feedback on evidence-based and culturally and linguistically sustaining early literacy instructional practices during the core literacy block, aligning with [Mass Literacy](https://www.doe.mass.edu/massliteracy/) and the [Massachusetts English Language Arts and Literacy Curriculum Framework](https://www.doe.mass.edu/frameworks/current.html). |
| Multilingual Learning Look-For Tool | Key Guiding Questions   * *To what extent are multilingual learners (MLs) experiencing rich, content-embedded, culturally and linguistically responsive instruction that supports their engagement with grade-level work and promotes deeper learning and language development, across program models and instructional settings?* * *To what extent is the MA Vision & Blueprint for English Learner Success evident in classroom practice?*   This tool is ideal for observing how well multilingual learners (MLs) are supported across various English Learner Education (ELE) settings, including English as a Second Language (ESL), Sheltered English Immersion (SEI), and Dual Language programs. It also helps assess whether learning environments affirm and value MLs’ cultural and linguistic assets. (*Related Resources*: [Massachusetts Vision & Blueprint for English Learning Success](https://www.doe.mass.edu/ele/blueprint/), [Next Generation ESL Toolkit](https://www.doe.mass.edu/ele/esl-toolkit/default.html)) |

## Classroom Walkthrough Guidance

Classroom walkthroughs offer a rapid yet insightful way to observe teaching and learning in action. By quickly scanning classrooms, educators can identify systemwide trends, celebrate successes, and pinpoint areas needing additional support or resources, to ensure that student learning is consistently grounded in grade-appropriate instruction.

**Purpose:** Obtain a quick snapshot of instructional practice and student learning across classrooms and schools.

**Goal:** Promote continuous improvement and educational equity for students through aligned and consistent grade-appropriate instruction.

**Frequency:** Regularly – can be weekly, twice monthly, or monthly

**Duration:** 10-15 minutes

**Feedback:** May offer brief, informal individual asset-based feedback or share out in the aggregate

**Evaluation:** Not used for teacher evaluation

Infographic: 

Text above the infographic reads: What actions, supports, or resources are needed to strengthen the systems, structures, processes, or practices that promote equity and facilitate deeper learning for all students?

In the middle of the illustration there is a triangle representing the instructional core. 3 shapes representing students, content, and teachers make up the 3 parts of the triangle. In the middle of them is an icon of students learning and text that says "Instructional Task".

Around the Instructional Core triangle is a process cycle showing 6 common walkthrough process steps: 1. Establish focus. 2. Prepare for the walkthrough. 3. Conduct the walkthrough. 4. Debrief the walkthrough. 5. Establish action steps. 6. Implement and assess the impact of action steps.

**Classroom walkthroughs:**

* Involve observations to collect data and monitor progress of initiatives that involve instructional change (e.g., implementing high-quality instructional materials, evidence-based early literacy practices, inclusive practices, culturally and linguistically sustaining pedagogy, technology integration, etc.) by using a common, shared tool.
* Promote continuous improvement of the systems, structures, processes, and practices that facilitate equitable student learning, growth, academic achievement, and outcomes.

**Walkthroughs focus on the instructional core:**

* The interconnected relationship among teacher (mindset, knowledge, skill, practice), student (engagement, ownership), and content (grade level or beyond, relevant, real world, interactive).
* Change in one element necessitates change in the other two for student learning to occur, at scale.

## Classroom Walkthrough Cycle

Classroom walkthroughs are effective only if they are done with regularity as part of ongoing and effective data cycles that drive instructional improvement for all learners.

### checklist icon Before the Walkthrough

Familiarize yourself with the observation tool.

Calibrate with your team on using the tool.

Choose priority indicators that align with the classroom walkthrough focus, coherent with district or school instructional initiatives and goals.

Review the look-fors and calibrate on expectations for those indicators.

If the walkthrough is for the purpose of coaching: schedule a pre-walkthrough conference to collaboratively determine focus and goals.

### Observation icon (a blue magnifying glass with people inside) During the Walkthrough

Take low inference notes—without interpretation—of teacher and students’ words, actions, and interactions.

Whenever possible, circulate to look at student work (in progress or completed during the observation), including both the task and student responses to the task.

Note pacing and alignment to lesson standards and objectives: content, practice, and language development.

**Example of Low Inference Notes**

| **Observation Notes: Teacher (1)** | **Observation Notes: Students (25: 17m/8f)** |
| --- | --- |
| * *Page 395. [T moves towards front of class where document camera is. Current worksheet projected.]* * *“Today, we’re going to take this a step farther like I asked you to and we’re gonna think about how we learn to write and think about relationships a little bit more carefully because today, we’re going to take these patterns, we’re gonna see how they’re related, and then, what is the next step we’re gonna do?” [T looks over table group at right where a student begins to answer]* * *[2 secs] “We’re going to turn them into line graphs. And we’re gonna be able to see patterns in our table and in our line graphs. OK? So what I’d like you to do is read this please with your neighbor and we’ll see how we can fill this table. Go ahead and please and do that.”* * *T walks over to table group of students on her right. Leans over one in a grouping of 5.* * *[50 seconds after] T walks back to front of room. “This is a real-life example, right? We saw yesterday how often food and recipe and batches can follow these patterns. What are they making in this recipe?” [Nods towards students at left who begins to answer.] “Hot cocoa. What’s another word for ‘hot cocoa’ for those of you who don’t know that?” [1 sec]* * *“How many of you have ever had hot chocolate marshmallows in the winter? It’s good right?”* | * *All students turn math workbook to page 395 and have it open.* * *Four students raise their hand. One begins to answer and is interrupted.* * *Students begin to read the math problem. Of 13 students in my view, two pairs are oriented towards each other and reading aloud the math problem to each other. The remaining students are reading aloud solo. One is grooming his nails, eyes off the page while his partner is reading aloud. 11 of 13 students complete the task within 2 minutes, and wait for the teacher, orienting their body and eyes towards the projector.* * *All students stop talking, and face teacher moving towards the projector.* * *4 males, 2 females raise their hands. “Hot chocolate” one shares out.* * *All students raise their hand and nod their head in response.* |

**Example of Interpretation**

*While most students (20/25) were attentive and on task, there were limited evidence of practices that support all students to meet the lesson objective and grade-level content and language development standards: T’s math language was imprecise, with articulated task/activity not clear, nearly no wait time between questions, which did not support students to grapple with the core content or purpose of the lesson; scaffolds and other resources to support students who may need them were not referenced or observed being used by students; peer-to-peer opportunity did not facilitate purposeful discourse; expectations and accountability for working with peers were also not evident. Area for further observation data collection and feedback: use (or non-use in this case) of affirming and asset-based language to foster student risk taking and sense of belonging (e.g., “...like I told you to...for those of you who don’t know”).*

### reflect and discuss iconAfter the Walkthrough

Review and revise notes, as necessary.

Reflect on and analyze what you observed.

When possible, review the lesson plan for the observed lesson to note alignment to targeted objectives and standards: content, practice, and language development.

Use the rating scale on the observation tool to quantify/qualify your interpretation of the observation, aligned to the walkthrough focus indicators.

Use a protocol to debrief the walkthrough as a group.

Determine and prioritize individual or team action steps to strengthen systems, structures, processes, and grade-appropriate instructional practices that promote equity and deeper learning for students.

If the walkthrough is for the purpose of coaching, schedule a post walkthrough conference to support reflection, provide feedback, discuss implications, and determine next steps.