During the Meeting

The meeting facilitator helps guide the discussion through the following steps. Whether the protocol is used a single time with a particular group or as part of a team's recurring decisionmaking process, users should commit a focused meeting for the discussion. This dedicated time will allow the group to dig beneath the surface to discuss both results and implications for improvement, without being diverted by other programmatic issues.

1. Do Introductions and Review Key Messages

Review the meeting's purpose, objectives, intended scope, and agenda. Announce key meeting roles (e.g., notetaker, timekeeper). Situate the conversation within the broader evaluation/continuous improvement process, such as exploring data to gain meaningful insight in order to understand progress and improve your program. Identify the evaluation questions that the group will address by the data analysis activity (e.g., at the end of this conversation, we want to be able to better understand "X" or say "Y"). Allow participants an opportunity to express assumptions or predictions they may have about what the data may reveal. Preview the steps of the upcoming discussion: observations, interpretations, implications, and next steps.

Introductions. How you begin your data meeting will depend on whether or not the stakeholders have previously worked together and the facilitator is familiar with all the participants. For teams without prior work history, you'll want to begin by providing an opportunity for introductions. In addition to stating their name, ask participants to share their role and a desired outcome for the work. This last piece of information will help you manage expectations as you shift into reviewing the agenda and stating the outcomes and scope of the meeting.

Key Messages. The facilitator should be prepared to do as follows:

- Introduce participants and topics.
- Review the agenda and provide context.
  - Situate the conversation within the broader evaluation or continuous improvement process.
  - Share the steps of the protocol so participants have a clear idea of the process.
- State the desired outcome.
  - Display this visually so participants can use the outcome to anchor the discussion throughout the meeting.
  - State nonpurposes upfront to clarify expectations and clearly limit scope. Point out the parking lot and explain to stakeholders that important issues that may not be within the scope of this meeting will be captured here.
- Establish ground rules to create a safe environment for participants.
  - Depending on the lifespan of the group (how many times they will meet and for how long), present ground rules or give the group an opportunity to brainstorm their own.
- Define and agree on common terms.
  - Clarifying definitions and terms is key to a common understanding. Avoid jargon or abbreviations, or create a handout defining commonly used words or abbreviations.

2. Present the Data

Display the data in a way that the group can aggregate and disaggregate the data as needed. For example, this may mean having a chart that presents the aggregated data but also being able to access the supporting Excel spreadsheet to show to the group and discuss.

Present data in an already organized way. For groups that provide observations or reactions, present data as a summary at a high level, but have data available in other formats, so that you can answer questions or walk participants through the data as needed. For groups with less data experience, this can be a great learning experience and help them gain insight. For those groups who may examine the data at a deeper level, be prepared to present data that the group can aggregate and disaggregate themselves.

Careful work to prepare the data and set up the context will pay off as you begin to look at data as a group. The facilitator should do as follows:

- Distribute or display the data to facilitate the discussion.
  - Share data visuals that are large enough to be visible to all participants; print charts or spreadsheets, project them, or provide both.
  - If you display data in more than one way, provide participants with clearly labeled personal copies so they can switch back and forth between multiple views.
  - If you share data in a spreadsheet, allow participants to review and manipulate data alone or as a group.
- Describe the data you are sharing with the group.
  - If you shared data in advance of the meeting, provide an opportunity for participants to ask any clarifying questions about the origin or characteristics of the data.
  - Explicitly state the parameters of the data (e.g., how the data were collected, limitations) and clarify for stakeholders what is being reviewed.
  - Explain if the group is examining individual-level data or broader data (such as program, state, or federal).
  - If participants have identified data quality issues, discuss implications, such as what effect data quality may have on decisionmaking, and if additional data points are needed to verify interpretations.
- Remind participants of the questions to address with the data analysis activity (e.g., tell the group, "At the end, we want to be able to better understand X or say Y").
- Demystify "analysis" for participants with a relatable definition (e.g., analysis is exploring data to gain meaningful insight; analysis can assist us in understanding progress and improving our program).

3. Discuss Observations of the Data

Guide the group in making observations about the data. Help participants look at the data without jumping to conclusions (School Reform Initiative 2004; Wellman and Lipton 2004).

Select or devise guiding questions based on the depth of data analysis your group is trying to accomplish and the capacity the group has for data analysis. Examples of guiding questions include the following:

- What do you see?

- What are your initial thoughts and reactions?
- Is this what you expected to see? If so, how? If not, why not?
- What surprises you?
- Are there particular data that catch your attention (e.g., a certain survey question, student score)?
- What do these data not tell you?
- What are the limitations of these data? What do you and other stakeholders need to keep in mind about the data as you review them?

Encourage participants to look at frequencies, outliers, and range of values for particular variables.

For most groups, it is helpful to allow time for initial conversation in pairs or small groups (no more than four in each group). Provide some focus questions for the groups to guide their discussion. Break questions into several rounds of small group discussions if you have a group that is less experienced at working with data, if you are working with a large quantity of data, or if you are working with data from a variety of sources.

To guide discussion and facilitate notetaking, display the questions for the group. Make sure the notetaker is ready to begin recording group observations in a way that is visible to all (e.g., recording them on chart paper or projecting from a laptop). This creates a record of the group memory and helps avoid repetition of similar ideas. In this first phase of discussion, keep the group from jumping prematurely to conclusions or application of the data. Keep group members processing what they see before moving to what it means, as interpretation and responses will come later in the process. It is also important to manage the conversation so that all stakeholders have the opportunity to provide input.

4. Discuss Interpretations of the Data

Prompt participants to interpret the data based on observations raised by the group in light of the evaluation questions. Have participants consider their own perspectives that they bring to the data.

Planners convene some data meetings simply to look for any input stakeholders can offer about how they see the data from their perspective. For more rigorous analysis, ask stakeholders how the data support their interpretation, particularly when they are using a portion of the data to draw a conclusion. Ask stakeholders to point to specific data to support their claims or assumptions. Be prepared to continue guiding the conversation with prompts such as these:

- How do the data answer our original evaluation questions?
- What thoughts or assumptions do these data confirm or contradict?
- Are there any limitations to our conclusions or interpretations?
- Are there any perspectives we haven't considered?
- Do you need additional data to answer your question?

Just like the observations, begin discussions in smaller groups first. The notetaker captures additional interpretations on the meaning of the data and records these conclusions for the group to see.

5. Discuss Implications of the Data

Prompt discussion of implications for the work based on the group's interpretations of the data and the conclusions they have drawn.

The group determines if the answers to the evaluation questions suggest a specific course of action. The group will want to think about what significance the data have and what, if anything, should be done. For groups with more advanced data skills, the bulk of the discussion will often take place here. For example, if the group has been evaluating implementation and outcome data from an ongoing project, the data may suggest either that the project should proceed as planned or that a course correction is needed.

Discussion questions might include the following:

- What do the data tell you about current infrastructure and practice needs?
- What are the implications?
- What is the significance for the work?
- Do the data suggest we do something different or maintain our current course of action?

The notetaker captures the group's discussion of the implications of the data so that these conclusions can be presented for the group to see.

6. Determine Next Steps for the Group

Based on the group's analysis of the data and suggested implications, discuss what, if any, additional actions are required.

Frame the discussion in terms of the group's role. Is the group working in an advisory capacity or does it have decisionmaking authority? This distinction will guide how you determine if the group provides recommendations or begins to initiate action. Specifically, guide the discussion to consider data in the context of programs, policies, and practices as stakeholders reconcile their learning from the data with current work. Considerations should include the following:

- What programmatic action items, such as changes, additions, or eliminations of programs or activities, do the data analysis and discussion call for?
- What changes, additions, or eliminations to policy can result from this analysis?
- If the group identified data quality issues, how will we improve data quality? Consider how you can leverage established data governance procedures.
- If additional data are needed to answer our evaluation questions, will we need to collect new data?

Document any actions the group identifies, and develop a detailed plan (or identify the individuals responsible for developing the plan later) to implement the actions. For best results, plans should include specific details, including who is responsible for each action, timelines for initiation and completion of each action, and either process or outcome data for each action. Specific components of action planning might include the following:

- Define the issue.
  - What do you know about the issue (who, what, where, when, why)?

  - What remedies have already been tried?
  - What questions have the data analysis and discussion raised for you today?

- Prioritize areas for action.
  - Realistically, what can the system accomplish with available resources?
  - What changes will result in the largest return on investment of time and effort?
  - Which changes will you address first?

- Determine root cause.
  - What is your hypothesis about why this is occurring? What data supports your hypothesis?
  - What additional data or participant points of view are needed, if any?
  - Are you currently collecting these data or does this data collection need to begin?

- Outline action steps.
  - What is needed to create improvement (actions, resources, policies, procedures, etc.)
  - How can you break the desired improvement down into manageable steps?
  - Who is responsible for implementing each action?
  - How can you plan ahead for continuity if there are personnel changes?

- Determine your timeline.
  - What is time span needed for implementing the planned action?
  - Does this topic warrant additional discussion and check-ins? If yes, how often?
  - If decisionmakers outside the group must approve proposed actions, when and how should the meeting leads notify the group (e.g., at the next meeting, via email)?

- Plan for evaluation.
  - How will you know implementers carried out the intended action as planned?
  - How will you know whether the action worked? What data will show improvement has occurred?

- Plan for follow-up and communication.
  - How will those implementing the actions communicate their progress and challenges, and to whom?
  - To whom should meeting leads communicate progress on the planned actions and evaluation results?

IDC has a number of action plan templates available as part of the IDC *Success Gaps Toolkit* that may be useful in this work. One example is included in the *Data Meeting Templates* section of this toolkit.

In some cases, the implications of the data may not be perfectly clear. If a decisionmaking group has formed a hypothesis about what is going on and what might improve the situation based on the data meeting, the group may need to put the best possible solution in place as a method of testing the hypothesis. By continuing and expanding data collection and analysis, if needed, the group can determine whether their hypothesis was correct or whether they need to find other solutions. Data collection and analysis are frequently iterative as the group explores the data and uncovers additional evaluation questions.

On other occasions, the group may not be able to draw conclusions they need to make recommendations or decisions using the data available. The best recommendation may be to further examine data about the issue. In these cases, the most reasonable next steps could include

- obtaining additional data (including requesting needed data from other sources);
- creating a plan to collect additional necessary data; and
- adding other stakeholders to the discussion to provide additional perspectives.

Regardless of the specific actions identified, any plan should include when and how the group will provide updates to meeting participants because completing the communication feedback loop is critical to maintaining stakeholder engagement.

As with the other portions of the group discussion, the notetaker should record any agreed-upon next steps.

7. Reflect on the Meeting's Effectiveness

As a final step, solicit feedback on the meeting to understand the participants' experience and inform improvement.

Participant feedback is an important element of determining the success of the meeting and the support stakeholders may need for future data meetings. Encourage participants to reflect on the meeting.

- What went well in this meeting?
- What could we improve for next time?

This is referred to as plus/delta (+/Δ). The notetaker should record responses. You also can collect this information using rating scales or a brief survey. In addition, offer participants the opportunity to speak individually and send further feedback via email (clearly identify to whom participants should send that feedback).