## Before the Meeting Planning

This template contains guiding questions to help protocol leads consider information they may need to plan a successful data meeting, including determining the objective, identifying and organizing the data, identifying and assigning responsibilities to participants, and preparing and distributing participant and process agendas.

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| Determine the Objective |
| What evaluation question(s) is the group expected to answer? What are the goals for the meeting? What is the desired outcome?  |
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| Is the intent of the meeting to obtain advice/recommendations or to make decisions? Will the group meet only once, on a short-term basis, or on a long-term basis?  |
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| What critical deadlines, cost or resource limits, or anticipated barriers are known? What effect does this information have on the evaluation question(s) and goals for the meeting? |
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| Identify the Data |
| What data will you include in the meeting? (List specific variables.) What data will help answer the evaluation question(s)? Will the data be qualitative or quantitative? Will the data need to be available in aggregated and disaggregated formats? |
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| Are the data currently available? Who has access to the data? Who is responsible for assessing the data quality and putting the data in a user-friendly format? How should you share the data? |
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| Identify Participants |
| Who owns the work? Will the person responsible for the work be present in the meeting? Which key decisionmakers need to be involved? Who needs to be at the table to provide context for the data participants will be analyzing? Who has a stake in the information? Will participants represent consumers of services? Will participants represent all needed voices?  |
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| How much will participants know about the topic? Has this group of people already been working together? Will all participants have the same level of knowledge? If participants will not have the same level of knowledge, what kind of background information might be helpful for those participants? |
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| Identify Participants’ Responsibilities |
| Facilitator |
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| Timekeeper |
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| Notetaker |
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| Will participants need any background information to be able to work effectively with the data? Will you cover this information during the meeting or in advance via a webinar or one-on-one training? Will stakeholders need *Family Educational Rights and Privacy Act* (FERPA) and *Health Insurance Portability and Accountability Act of 1996* review? |
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| Organize the Data to Present  |
| How will you organize and present the data? What format will make the information easy for stakeholders to use during the meeting? What data visualization strategies could be useful? Who will create the visuals and what is the timeline for completion? |
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| Does any data analysis or summary need to be done before the meeting (descriptive or inferential statistics)? Who will do this and what is the timeline for completion? |
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| How will you show the data in the meeting? Will the data be easily visible if projected? Will participants need their own copies (either paper or digital)? Will participants need the data in the spreadsheet to manipulate the data during the meeting? |
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| Prepare and Distribute Agenda |
| Prepare participant agenda, including date and location, start and end times (including breaks), virtual option as needed, and evaluation questions participants will address. (See[*Sample Participant Agenda*](#Sample_Participant_Agenda).) |
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| What, if any, data do you want participants to review/explore in advance? What contextual information will participants need to interpret the data? |
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| Is there sufficient time on the agenda for participants to complete desired tasks? Is there a mix of information sharing and activity to keep participants engaged? |
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| If activities require grouping, will the groups need to be homogeneous or heterogeneous? Will you assign groups in advance or during the meeting? Will groups change according to activity? |
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| Who is responsible for reserving space, collecting materials, room arrangement, etc.? |
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| Who will distribute the agenda to participants? How far in advance will it go out? |
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| Do you need a premeeting information session? Whom should you invite? |
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| What information will you need to include on the process agenda—the agenda to be used by those planning and conducting the meeting? (See[*Sample Process Agenda*](#Sample_Process_Agenda).*)* |
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