Before the Meeting

Many decisions need to be made and communicated before a group convenes for a data meeting. The protocol lead, with input from others as appropriate, helps the group prepare for the meeting. Items to consider include the objectives and desired outcomes of the meeting, what data the group will use, and who will serve key roles in planning and conducting the meeting.

1. Determine the Objective

Establish the purpose, goals, and desired outcomes of the data meeting, including any evaluation questions the group wants answered at this time.

The key to a successful meeting is having a clearly articulated idea of what success looks like—what is the desired outcome from the meeting. To create ownership and engagement, determine a clear purpose to communicate to invited stakeholders, whether they are novice data users or have a deep understanding and appreciation for data. This, along with a defined time commitment for the work, is essential. Often, the identification of critical tasks and deadlines can guide the time commitment.

When defining the objective, think about what you want to know. The first task is clearly identifying the intent and expected outcomes of the meeting.

- What is the focus for this data meeting? What evaluation questions do you need to answer?
- What is already known? What are the nonpurposes of the data analysis? What is outside the scope of the evaluation questions?
- Will this be a one-time event? Will you need to have multiple meetings to address short-term, intermediate, and long-term questions?
- Will the group of participants being assembled serve in an advisory capacity, or will it have responsibility for decisionmaking? How does this influence the focus of the meeting?
- What cost constraints or resource limits (including personnel) must you consider as parameters for any potential actions? What effect does this information have on the meeting objectives?
- Are there any potential problems or challenges that you need to consider?

When defining your objective and goals to be shared with participants, avoid acronyms and abbreviations.

2. Identify the Data

Determine what data will be most useful for a group discussion addressing the evaluation questions.
Identify data the group can analyze to answer the evaluation questions. Ideally, high-quality data that are clearly linked to the evaluation question would be readily available. In reality, available data may not be a perfect fit, and the team will need to make decisions around identifying the most informative data source or sources. Consider the following:

- What data sources are available? A new data collection should occur only if critical information is missing.
- What qualitative and quantitative data will provide contextual information to support analysis and decisionmaking?

- Has someone with knowledge of the data or the data source assessed the quality of the data? If data are not accurate, timely, and useful, analysis could be skewed and lead to faulty conclusions and decisionmaking. Data stewards (i.e., individuals who collect, use, and submit data that have been identified as relevant) can describe limitations on data quality for the group's consideration. They can provide input on data sources and methods to best answer the group's questions.
  - For data meetings where the goal is to elicit responses to summary data from stakeholders who have limited data analysis experience, the protocol lead, and perhaps the facilitator, should assess data quality in advance.
  - If stakeholders with content and data knowledge are participating in a data meeting, the meeting agenda may need to include conversations about quality of the data, its strengths and limits, and need to explore alternate data.
- Data selection may be iterative as the group identifies additional data to examine based on the group's findings.

Document a final list of specific data to include in the meeting. The protocol lead can share this list of identified data with the data steward well in advance of the meeting in order to request data. The data list also will inform what background information meeting participants will need to work effectively with these data. The protocol lead can share this information prior to the meeting.

3. Identify Participants and Key Responsibilities

Identify key decisionmakers and relevant stakeholder perspectives to include in the meeting. Determine who will serve in the key roles of meeting facilitator, timekeeper, and notetaker. The protocol lead also may serve as the meeting facilitator or may assign another individual as facilitator while the protocol lead serves a different role.

Determine key responsibilities. Decide who will plan the meeting, facilitate the meeting, and prepare the data for presentation to meeting participants. If the person who is going to facilitate the meeting is someone other than the person who will initiate the meeting, these two parties will need to work together before and after the meeting to ensure the meeting meets desired outcomes.

It is sometimes helpful to bring in an outside facilitator for data discussions. For example, states that are not accustomed to leading data meetings might benefit from having an IDC TA provider serve as meeting facilitator for the initial meeting, with responsibility for meeting facilitation shifting to state staff over time. At other times, a state may need a neutral third party to serve as facilitator for the comfort of stakeholders or so that all staff are able to focus on participation in the discussion.

In addition to the protocol lead and meeting facilitator, identify people prior to the meeting to serve in supporting roles such as the timekeeper and notetaker. Assign and document clear responsibilities to ensure meeting participants accomplish necessary tasks and the work continues to move forward.

Select meeting participants. The protocol lead, with input from others as appropriate, also should carefully consider additional meeting participants during the planning process. Depending on the content of the data or the evaluation questions you plan for the meeting, you will need to involve participants with different points of view and experience with both the data and the programs.

Consider including all those who have a stake in the information being considered.

- Who needs to be at the table to provide context to data being analyzed?
- What voices need to be represented?
- Will participants include individuals with data literacy skills that can support the data discussion?

For data discussions that aim to gather reactions about a particular set of data, it can be extremely valuable to invite a broad group of stakeholders with an interest in the conversation and knowledge about different areas of the context (e.g., state staff, local staff, regional staff, practitioners, policymakers, and community members). Practitioners, for example, often can provide valuable insight into the details of context that may be swaying data in one direction or the other and also can speak to how realistic any proposed changes are for those working directly with students.

For more in-depth or statistically sophisticated data analysis, include participants who have expertise in the content area as well as those who are knowledgeable about the data. For in-depth data discussions, such as a group working to determine root cause, data analysis will more likely occur over a series of meetings. In this case, protocol leads and facilitators might choose to build time into initial agendas to ensure that all stakeholders have sufficient background and context to analyze the data. Finally, for changes to occur, relevant decisionmakers need to participate in the conversation so they have an opportunity to learn first-hand about the impact of decisions.

Including Stakeholders in Data Meetings provides additional recommendations for selecting data meeting participants, including establishing a clear objective for stakeholder participation, identifying relevant perspectives for inclusion, determining a structure and timeline for stakeholder participation, and supporting stakeholders in their understanding and use of data.

4. Organize the Data to Present

Organize data for the most effective presentation and use during the meeting. Aggregate or disaggregate the data, as appropriate. This may involve turning raw data into accessible formats, for example, transcribing individual interviews into transcripts; documenting meeting agendas; entering survey responses into a spreadsheet; summarizing quantitative data by using descriptive statistics (e.g., tabulations, averages, ranges); or providing simple data visuals (e.g., bar graphs, pie charts, infographics).

Of the available data, how much of it should you share and review in the meeting? What are the most important data to share to elicit stakeholder perspectives and feedback? Consider the level of detail you need about the data. How might you need to break apart or group the data during the meeting? Knowing how much processing and formatting the data will need also helps you plan to request the data in sufficient time.

Displaying data in an easy-to-understand, accessible format is critical to the success of the meeting. This could include

- summarizing quantitative data by using descriptive statistics (e.g., tabulations, means/averages, ranges);
- providing simple data visuals (e.g., bar graphs, pie charts, or infographics);
- transcribing individual interviews into transcripts;
- condensing meeting agenda data; and
- summarizing survey responses into a spreadsheet that makes data accessible and useful.

Some things to think about when creating visual presentations of data for stakeholder groups include

- keep data presentations simple—each graph/visual should present one concept;
- define acronyms, abbreviations, or other terms;
- clearly identify all the items displayed on the visual;
- show visuals to staff who are not involved in the meeting to gauge how easy it is to understand the visuals;
- prepare a short introduction and summary for each visual, including the source and any other critical information participants will need to interpret data accurately; and
- consider whether stakeholders may need hard or digital copies of the data when trying to unpack the information.

When conducting meetings in which more in-depth data analysis will occur, you may want to enable participants to examine data in multiple ways. Creating an Excel workbook with labeled tabs can help stakeholders look at the data in different ways on demand during the meeting. Stakeholders can slice or group data to gain the insight they need. (If you will be disaggregating data to levels at which students could be identifiable, make sure to follow guidelines for data privacy and security). Some participants prefer charts for data, while others may gain more meaning from tables. More experienced data users may want to see both raw data and analysis. If you have more data than participants can examine in one meeting, decide with stakeholders how you should organize, analyze, and present the data.

5. Prepare and Distribute the Agenda

Include the evaluation question or questions the group will address. Consider providing organized data in advance to give group members the opportunity to explore and think about the data prior to the meeting. Determine what information to share in advance to provide the necessary context. You also may want to create a process agenda for use by the protocol lead or facilitator that includes discussion prompts and other helpful suggestions.

Participant agenda. Preparing and sharing a participant agenda in advance facilitates good communication. Be clear about your expectations for stakeholders, both before and during the meeting. At minimum, the agenda should include

- meeting date and location, including information on participating virtually, if that is an option;
- meeting start and end time, including breaks, if needed;
- the objective or desired outcome of the meeting;
- topics meeting participant should discuss, including any evaluation question or questions they should address, as relevant; and
- background material or data the participants should review in advance of the meeting.

Consider your overall timeline and ensure you are sending the agenda early enough for stakeholders to complete any advance preparation. While you might consider sending data for any data meeting in advance, it may be most important to send data in advance for in-depth data analysis due to the sophistication and quantity of data you will ask stakeholders to analyze.

Process agenda. Once you have an agenda for participants, you will want to create a process agenda for use by the meeting facilitator. This is a chance to think through the meeting step by step and plan the agenda topics and the flow of the meeting carefully. Dedicate sufficient focused meeting time to the protocol to allow the group to dig beneath the surface to discuss both observations and implications for improvement. Consider the structure and facilitation strategies that will best support the group in accomplishing the desired objectives. Think critically about questions such as the following:

- 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?
- If activities require grouping, will you need homogeneous or heterogeneous groups? Will groups change according to activity?
- How long will it take to introduce the data? What context is necessary to include?
- What is the best method for soliciting stakeholders' interpretations of the data?
- Will participants need breaks (best practices for adult learning typically suggest a 10- to 15-minute break every 1.5 hours)?
- What room arrangement do you need to facilitate work within groups? How does the arrangement differ if the group is larger than you expect? Smaller than you expect?
- If any stakeholders will participate virtually, how will they take part in small group discussions?

The process agenda also provides a place for facilitators to record their own notes and reminders to use during the meeting. For example, groups often find it helpful to designate a space to record ideas that are important to address but may not be within the scope of the current conversation—frequently referred to as a "parking lot." Process agendas also can note the materials you will need to facilitate the meeting (e.g., chart paper, laptop, projector, nametags), Wi-Fi access codes, or other information to help the meeting run smoothly.

Examples of participant and process agendas can be found in *Data Meeting Templates*.