



# Data Meeting Protocol

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The *IDEA* Data Center (IDC) created this document under U.S. Department of Education, Office of Special Education Programs Grant No. H373Y130002. Richelle Davis and Meredith Miceli serve as the project officers.

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**Suggested Citation:**

Nimkoff, T., Shaver, D., and Schroeder, K. (2018, January). *Data Meeting Protocol*. *IDEA* Data Center. Rockville, MD: Westat.



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## Why a data meeting protocol?

Many states have expressed a need for support in the analysis and use of evaluation data to inform continuous improvement efforts. A protocol provides a simple structure that state and local teams can use to guide conversation around evaluation data during meetings. This protocol is based on the premise that a key part of the data analysis process involves talking about the results of evaluation activities and making meaning of the results together. The protocol is designed to help groups leverage the data they have gathered and engage in a process of data-informed decisionmaking through guided conversation. The protocol reflects the principles of data use identified in the *IDEA Data Center Part B Data System Framework* and the *DaSy Data System Framework*.

## Who is this protocol for?

Anyone engaged in making decisions using evaluation data, such as for the State Systemic Improvement Plan (SSIP), can use the protocol, including those who are conducting internal evaluation activities and those who are making decisions based on data provided by external evaluators. Targeted users include Part B state directors and their staff, Part C coordinators and their staff, Part B and Part C data managers, individuals leading SSIP activities, and local programs and staff.

This protocol requires a team member to serve as the protocol lead who has key responsibilities both before and after the meeting. During the meeting, the protocol lead, or another individual, serves as facilitator, guiding participants through the group discussion process.

## How might the protocol be used?

State and local staff can use this protocol with data that relate to a program's processes and address the extent to which—and how well—they are implementing a program, as well as data that target the extent to which a program achieves its expected outcomes.

The protocol lead should dedicate focused meeting time to the protocol to allow the group to dig beneath the surface to discuss both observations and implications for improvement. Groups can use the protocol during a single meeting or series of meetings, as part of a recurring decision making process. For example, there may be additional analyses that result from an initial meeting, or the group may cycle through multiple meetings using the protocol process depending on the topic, depth, and breadth of data they want to address.

## What is the protocol process?

The protocol includes a series of steps to follow before, during, and after a meeting. Before the meeting, the protocol lead determines the objective and the data to use, identifies participants and key responsibilities, organizes the data to present, and prepares and distributes the agenda. During the meeting, a facilitator guides participants to discuss observations based on the presented data, interpretations and implications of the data, next steps for the group, and reflections on meeting effectiveness. Following the meeting, the protocol lead provides a recap of the meeting and next steps.

## Protocol Steps

### Before the Meeting

The protocol lead, with input from other members of the team as appropriate, helps the group prepare for the meeting.

1. **Determine the Objective.** For example, what does the group want to know? What evaluation questions does the group want to answer at this time?
2. **Identify the Data.** For example, what information (data) is available to address the evaluation questions that would be useful for a group discussion?
3. **Identify Participants and Key Responsibilities.** Identify key decisionmakers and relevant stakeholder perspectives to include in the meeting, such as other state staff, local/regional staff, practitioners, policymakers, and community members, as appropriate. Determine who will serve in the key roles of meeting facilitator, timekeeper, and notetaker. The protocol lead may also serve as the meeting facilitator, or may assign another individual as facilitator, while the protocol lead serves a different role.
4. **Organize the Data to Present.** Aggregate/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) and simple data visuals (e.g., bar graphs, pie charts, infographics).
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.

### During the Meeting

The meeting facilitator helps guide the discussion through the following steps.

1. **Introductions and 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.
2. **Present the Data.** Display the data in a way that the group can aggregate and disaggregate as needed. For example, this may mean that the facilitator has the chart to present the aggregated data but also can access the supporting Excel spreadsheet to show to the group and discuss.

3. **Discuss Observations of the Data.** Use guiding questions to help the group observe the data.

- What do you see?
- What are your initial thoughts or reactions?
- Is this what you expected to see? If so, how? If not, how?
- What surprises you?
- Are there particular data that catch your attention? (e.g., a certain survey question, student score)
- What do these data not provide? What are the limitations of these data?

4. **Discuss Interpretations of the Data.** Prompt participants to interpret the data in light of the evaluation questions. Have participants consider their own perspectives that they bring to the data.

- What does it tell you?
- What answers are you getting for our original evaluation questions from the data?
- What thoughts or assumptions do these data confirm?
- Are there any limitations to our conclusions?
- Are there any perspectives we haven't considered?
- Do we need additional data to answer our questions? What additional data might inform this? Are we currently collecting these data OR do we need to collect new data?

5. **Discuss Implications of the Data.** Prompt discussion of implications for the work.

- What are the implications?
- So What? Why does this matter?
- What does it mean for the work?
- Based on what you see, is there support to maintain our current course of action or should we do something different? Why?

The facilitator or notetaker captures the group's observations about the data. Display questions (e.g., with a projector or flip chart) throughout the meeting for all to see to help guide discussion and facilitate note taking.

The facilitator or notetaker captures additional interpretations on the meaning of the data.

6. **Determine Next Steps for the Group.** Based on group interpretations and suggested implications, discuss additional actions that are required.
  - Are there specific actions, such as changes, additions, or eliminations of programs or activities, that should occur?
    - If yes, then outline a specific plan to execute, including who is responsible, the timeline, etc.
  - Does this topic warrant additional discussion/check-ins?
    - If yes, what is the timeline (e.g., weekly, bi-weekly, monthly, quarterly)?
  - If action is required, when and how should the group be notified that this has occurred (e.g., at the next meeting, via email)?
7. **Reflect on the Meeting's Effectiveness.**
  - What went well in this meeting?
  - What could we improve for next time?

The facilitator or notetaker records implications and agreed-upon next steps.

## After the Meeting

The protocol lead provides a recap of the meeting and next steps.

1. Distribute notes from the protocol process.
2. Confirm next steps and timeline for additional actions, as appropriate.

## Resources

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School Reform Initiative. (2004). *ATLAS Looking at Data Protocol*. School Reform Initiative. Denver, CO. Accessed December 1, 2017, from <http://www.schoolreforminitiative.org/>.

Wellman, B., and Lipton, L. (2004). *Data-driven Dialogue: A Facilitator's Guide to Collaborative Inquiry*. Sherman, CT: Mira Via, LLC.