Collaborative Data Inquiry Practitioner Toolkit

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CDI Practitioner Toolkit User Guide

What Is Collaborative Data Inquiry?

Collaborative data inquiry (CDI) is a process designed to support evidence-based improvements in instructional practice. In CDI, educators collaborate by using data to connect teaching to student learning and behavior and to continuously improve instruction and classroom environments through data inquiry cycles, which can include analysis, planning, action, and reflection/adjustment (Boudett, et al. 2020; Cochran-Smith & Lytle, 2009). Instructional teams engaged in CDI identify shared challenges using multiple forms of data (including observations of teacher practice), engage in constructive critical dialogue, and implement meaningful instructional changes aimed at addressing identified issues (Horn & Little, 2010; Mandinach & Gummer, 2016; Nelson et al., 2012). Successful CDI teams exhibit strong collaboration, shared practices, and active participation and commitment from each team member. Such habits and norms support collective engagement with data to build a shared understanding of the need for instructional change (Nelson et. al., 2008). In K–12 schools, various models of data-driven decision making, data inquiry cycles, and continuous improvement have been widely adopted. We use the term "collaborative data inquiry" (CDI) to refer to the core practices common to many of these models.

Collaborative data inquiry: A process in which teams work together to analyze and interpret data, identify patterns and insights, and use this information to inform decisions aimed at improving teaching practices and student learning.

Who Is This Toolkit For?

Instructional leaders have long observed that CDI appears to be more productive in some teams than in others. This toolkit seeks to help instructional leaders and educators understand, identify, and evaluate the characteristics, processes, and behaviors of effective teams as they engage in CDI, data-driven decision making, and other continuous improvement processes that rely on data. Although leaders of the Data Wise project at the Harvard Graduate School of Education helped to develop the toolkit, it is not intended for use with Data Wise-trained instructional teams only. Instead, the toolkit is designed to support districts, schools, and instructional teams engaged in many different forms of data inquiry, data-driven decision making, and continuous improvement cycles.

The CDI Practitioner Toolkit will be most useful in districts and schools that have designated regular time(s) for instructional teams to meet, have invested in training team members in CDI practices, and have communicated expectations for how instructional teams will use their meeting time. The toolkit is designed to enable school and district leaders to gain insights into team functioning, provide formative feedback, and plan for support and sustainability of CDI practices (see textbox).

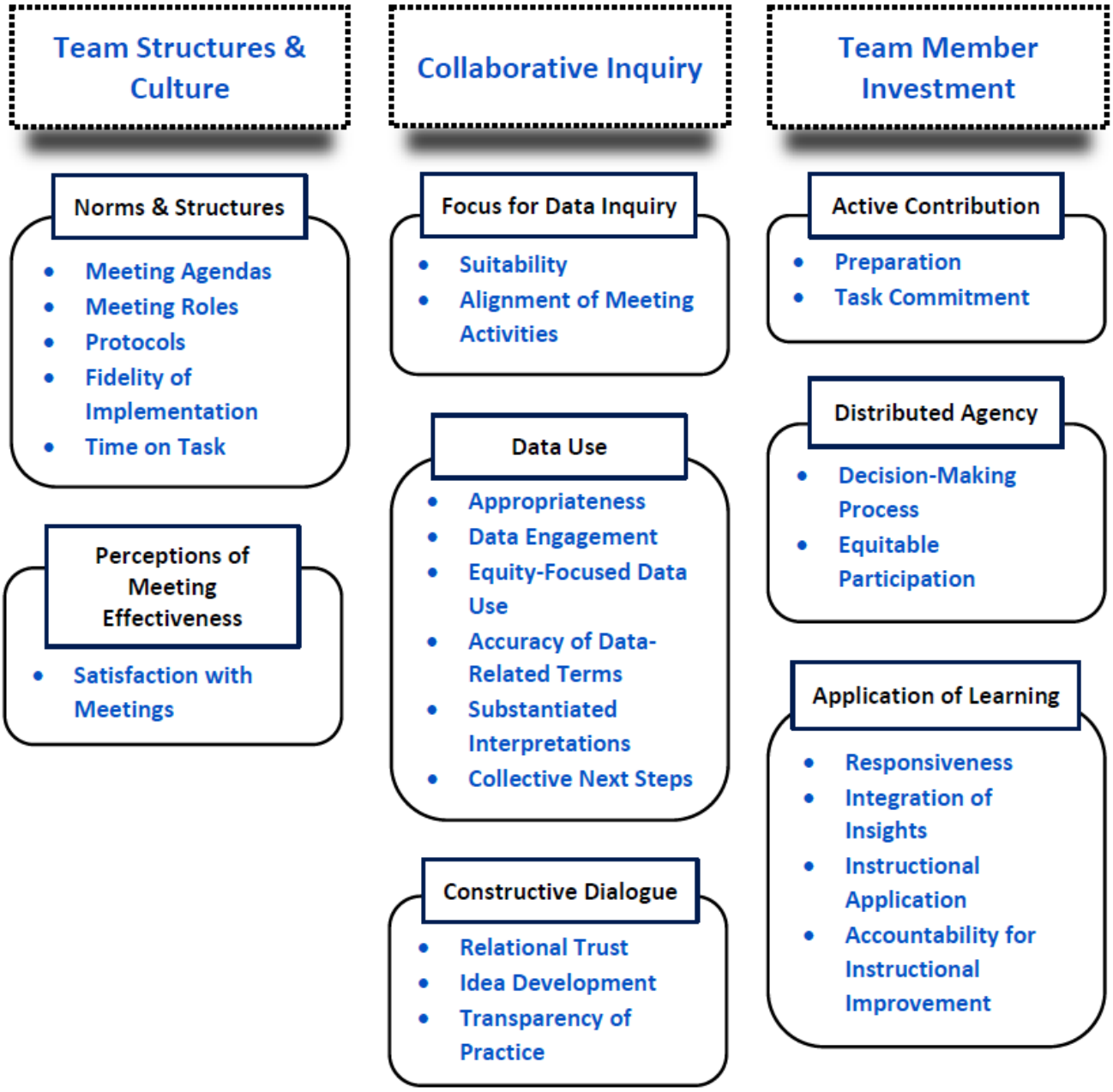
Although the CDI Practitioner Toolkit will be relevant to many different models of data inquiry, data-driven decision making, and continuous improvement, it is only meant to be used once instructional teams are actively engaged in looking at data with a purpose or problem of practice in mind. It is likely not appropriate for observing teams early in the school year or teams that are just beginning the data inquiry process. CDI teams often use their first few meetings to get organized, establish norms and meeting structures, identify a data inquiry focus, and begin organizing their data. This toolkit assumes that teams have already completed those steps. Therefore, instructional leaders should wait until at least a couple of months after the school year has begun to observe instructional teams, once they are ready to begin examining data with a particular inquiry focus or problem of practice in mind.

CDI Practitioner Toolkit Purposes

- Monitor the progress of instructional teams and team members engaged in CDI;
- Understand the extent to which CDI is supporting productive conversations about instructional practice;
- Provide teams with actionable feedback;
- Identify teams that need additional support and coaching; and
- Support scaling and sustaining CDI throughout the district after external training and support has ended.

Key Characteristics of Collaborative Data Inquiry

The CDI Practitioner Toolkit measures three domains of team processes theorized to contribute to effective team functioning (as shown in the graphic below). Each domain (dotted rectangles) is made up of one or more constructs (solid rectangles). The instruments included in this toolkit are designed to measure these constructs. More information about how toolkit components can be used to measure each construct can be found in the CDI Toolkit Validation Study Report.

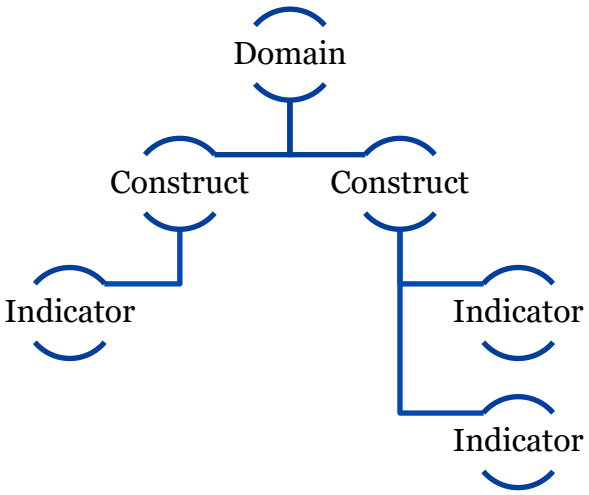


CDI Practitioner Toolkit Components

In addition to this user guide, the CDI Practitioner Toolkit has five components. The Instructional Team Meeting Observation Rubric and Team Meeting Exit Ticket are designed to capture information about individual team meetings; they can be used to capture data about the quality of collaborative inquiry in one or more team meetings over the course of a school year. The Team Reflection Protocol and Data Dashboard are intended to support teams and instructional leaders as they review observation and exit ticket data and reflect on their team(s)' progress. The End-of-Year Survey asks team members to reflect on team meetings over the course of the entire school year and report on application of the insights gained during team meetings. The Team Member End-of-Year Survey captures information that periodic meeting observations may miss.

The **Instructional Team Meeting Observation Rubric** (Observation Rubric) is designed to be used by an external observer to record team processes as they occur in a single meeting and to capture aspects of team functioning at a single point in time. The external observer could be an instructional coach, an instructional team leader, another instructional leader at the school or district level, a researcher, or a CDI model coach.

For seven CDI constructs, the Observation Rubric includes descriptions of practice at three levels (Emerging, Developing, and Proficient) for up to 6 indicators related to the construct. Observers assign scores of Emerging, Developing, and Proficient at the indicator level first and then provide an overall construct score from 1 to 7.



The **Team Meeting Exit Ticket** (Exit Ticket) is administered to all team members at the end of an observed meeting. It is intended to collect feedback on the meeting from the participants' perspective, to complement the assessment of external observers. The exit ticket is designed to be short and easy to complete (requiring fewer than 5 minutes). For this reason, it measures a subset of the indicators and constructs covered by the Observation Rubric.

The **Team Reflection Protocol** (Reflection Protocol) is designed to support team, school, and district leaders in facilitating productive conversations with teams about the data generated by the toolkit. It includes discussion questions as well as a template to guide discussions. The **Data Dashboard** supports this process by summarizing observation and exit ticket data in visuals to be referenced during the reflection meeting. Users will enter the data they collected during team meetings via the observation rubric and exit ticket in an Excel template, which will then summarize the data entered in a series of tables and graphs.

The **Team Member End-of-Year (EOY) Survey** (EOY Survey) includes questions about team members' experiences in their instructional team throughout an academic year. It complements the Exit Ticket by capturing team members' perceptions of team meetings over time. All members of an instructional team should respond to the survey, which will take approximately 25 minutes to complete.

How to Use the Instructional Team Meeting Observation Rubric

The CDI Practitioner Toolkit's Instructional Team Meeting Observation Rubric offers a snapshot of team functioning at a specific meeting. This rubric is organized in the domain–construct–indicator structure described in the previous section. Observers rate *indicators* of seven CDI constructs on a three-level scale (Emerging, Developing, Proficient) and then assign each *construct* an overall score from 1 to 7.

We recognize that teams often become more proficient over time through collaborative inquiry and engagement with data and that performance can vary from meeting to meeting. However, the Observation Rubric is designed to capture instructional team practice at a single point in time. When using the rubric, set aside any prior knowledge of the team and focus solely on the interactions and dynamics present on the day of observation. A team's developmental trajectory can be captured by comparing observation scores collected during different meetings. The Team Meeting Exit Ticket and Team Member End-of-Year Survey also include questions that help capture team members' perspectives on team functioning across time, complementing the data from your observations.

In some cases, teams function particularly well because of the presence of a strong facilitator. If this is the case for the team that you observe, do not try to disentangle the contributions of the facilitator from those of the other team members or speculate how the team would function in the absence of the facilitator. The Observation Rubric is intended to capture how the team operates as it is observed, including the roles and structures that are in place during the meeting.

Domain 1 | Team Structures and Culture

What Is This Domain?

Team Structures and Culture includes the frameworks and social norms that govern how members of a team function together. Team structures define the roles, responsibilities, and hierarchy within a team, determining how tasks are organized, coordinated, and executed. Team culture encompasses the shared values, beliefs, behaviors, and norms within the team, influencing how team members communicate and make decisions (Nelson et al., 2008). Together, these elements create an operational and interpersonal environment that can either enhance or hinder a team's effectiveness and cohesion.

This domain is crucial because it directly affects how data is used in decision-making processes—good structures and a positive culture can lead to more collaborative and effective use of data to improve educational outcomes. The domain of Team Structures and Culture has two constructs: **Norms and Structures** and **Frustration with Meetings**. Norms and Structures is measured by the observation rubric, while Frustration with Meetings is assessed only through the EOY Survey, as such feelings can be difficult to observe during meetings.

Construct | Norms and Structures

Norms and Structures captures the foundational practices that shape the team functioning, including routines and standard processes for how team members execute tasks. Clear norms and structures facilitate consistency and efficiency in team meetings. This construct has five indicators: **Meeting Agendas**, **Meeting Roles**, **Protocols**, **Fidelity of Implementation**, and **Time on Task**.

Indicator | Meeting Agendas

Meeting Agendas measures the preparation and adherence to structured meeting plans.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Meeting agenda is either absent or not adhered to.	Meeting agenda is present, but there are significant portions of the meeting that do not adhere to the agenda.	Meeting agenda is present and has clear objectives; the meeting focuses primarily or exclusively on agenda items.
Key Terms		
Meeting Agenda: A structured guide for the team's meeting aligned to goals and objectives. It may include objectives, a progression of activities, time allocation, roles and responsibilities, and outcomes.		

Indicator | Meeting Roles

Meeting Roles focuses on the group's ability to clearly assign roles and act in accordance with those roles in ways that guide the meeting toward achieving the objectives.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Meeting roles are either absent or not clearly defined. As a result, meeting objectives may not be achieved, and/or	Some roles are assigned (e.g., facilitator or timekeeper), but they may not be consistently or effectively utilized. Their	Roles are clearly assigned and assumed, and they contribute to the progress of the meeting.

Emerging	Developing	Proficient
discussions may deviate from the intended focus.	effectiveness in driving toward the meeting's objectives is inconsistent; some progress may be made, but key objectives may not be fully addressed.	Roles work together to maintain focus and advance the meeting's objectives.

Key Terms
Meeting Roles: Assigned responsibilities during a meeting (e.g., facilitator, timekeeper, note-taker).

Indicator | Protocols

Protocols assesses whether and to what extent protocols (e.g., structured discussion routines) exist and are applied to team processes.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Protocols for team processes are either absent or unclear.	Protocols for team processes exist but may not be understood by all members or may not effectively contribute to meeting goals.	Protocols for team processes are generally followed; when necessary, they may be strategically adapted to ensure that meeting goals are reached.

Key Terms
Protocol: Established guidelines or procedures followed by the team to structure its processes and discussions.

Indicator | Fidelity of Implementation

Fidelity of Implementation assesses how well team members understand and use specific concepts and terms related to the data inquiry model that their district or school is using and/or to the data inquiry training they have received. Examples of data inquiry models include the Data Wise Framework, professional learning community (PLC) model, or Achievement Network (ANet).

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Team members do not use terms or concepts relevant to the data inquiry model on which they have been trained or that their district or school has adopted.	Team members use some terms and concepts relevant to their data inquiry model accurately, but there is evidence of some	Team members consistently use terms relevant to their data inquiry model, including terms describing specific phases and steps in the inquiry cycle,

Emerging	Developing	Proficient
Alternatively, they attempt to use relevant data inquiry terms or concepts but do so inaccurately.	confusion or inconsistency in their application.	correctly and effectively. Team members have a clear understanding of these terms and apply them accurately in the context of the discussion.

Key Terms

Fidelity of Implementation: The extent to which the terms or concepts relevant to a data inquiry model are used accurately and consistently by a team.

Data Inquiry Models: Structured frameworks and processes teams can adopt to guide their collaborative data inquiry process. Data inquiry models are typically built around continuous cycles of analysis, planning, action, and reflection/assessment.

Indicator | Time on Task (*)

Time on Task measures the efficiency and focus of team meetings. A key differentiator among the levels of practice is the extent to which time is lost to interruptions, unrelated discussions, or off-task activities.

The (*) mark indicates that the **Time on Task** indicator could be weighted slightly more heavily in cases where you are struggling to decide a score when rolling up indicator-level scores to the construct level, to help push you to one score point over another.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Meeting time is not used efficiently because of late arriving members, unrelated housekeeping, or discussions that do not align with the purpose of the meeting.	Meeting time is generally on task, but some time is lost to off-topic discussions or delayed starts.	Meetings start and end on time, with minimal to no time spent on unrelated discussions.

Key Terms

Time on Task: The extent to which the time spent during a meeting is focused on accomplishing the meeting's objectives and planned activities.

Unrelated Housekeeping: Activities not related to the data inquiry cycle or meeting objectives (e.g., planning a holiday party, brainstorming fundraising opportunities for the annual field trip). By contrast, **related housekeeping** may be activities such as clarifying the agenda or goals for the session, assigning roles, and scheduling follow-up meetings.

Domain 2 | Collaborative Inquiry

What Is This Domain?

Collaborative Inquiry captures team-based problem-solving centered on student data and instructional strategies (Cochran-Smith & Lytle, 2009). It involves collective efforts to understand and improve teaching practices and student outcomes through structured, evidence-based discussions and actions. This process encompasses identifying shared challenges, using multiple forms of data and evidence (including observations of teacher practice), engaging in constructive critical dialogue, and implementing intellectually rich instructional changes aimed at addressing identified issues. Collaborative inquiry refers to the actions and educational practices that teachers engage in as a group—the actual tasks, discussions, and decision-making processes related to improving teaching and student outcomes.

Teams characterized by strong collaborative inquiry are able to harness the collective expertise, perspectives, and creativity of educators. By engaging in collaborative inquiry, teams can develop a deeper understanding of the factors affecting student learning, leading to more nuanced and effective solutions. Furthermore, this collaborative process promotes a culture of continuous learning and improvement among teachers, fostering professional growth and a shared sense of purpose.

The domain of Collaborative Inquiry has three constructs: **Focus for Data Inquiry**, **Data Use**, and **Constructive Dialogue**.

Construct | Focus for Data Inquiry

Focus for Data Inquiry encompasses the team's ability to collaboratively pinpoint and address a specific, education-related issue that is significant in their context. This involves identifying a focus for data inquiry that is actionable and grade-level appropriate. This construct has two indicators: **Suitability** and **Alignment of Meeting Activities**.

Indicator | Suitability

Suitability assesses whether the data inquiry focus is aligned with grade-level and content standards and takes students' prior learning into account. This indicator also measures whether the team is identifying and addressing a specific, common challenge that the group currently faces (Horn & Little, 2010).

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
The data inquiry focus is not clear, or it is not relevant or appropriate for the team's grade level or content focus, or it is not aligned with standards. The data inquiry focus does not address curricular objectives or build on students' prior knowledge and/or strengths.	The data inquiry focus is somewhat relevant, appropriate, or aligned with the team's grade level, content focus, and standards. The data inquiry focus may not fully address curricular objectives or build effectively on students' prior knowledge and/or strengths. Adjustments would be needed to ensure the focus is challenging yet attainable and actionable.	The data inquiry focus is fully relevant, appropriate for the team's grade level and content focus, and aligned with standards. The data inquiry focus effectively addresses curricular objectives and builds on students' prior knowledge and strengths. The focus is challenging yet attainable and actionable.

Key Terms
Data Inquiry Focus: The central educational issue or problem the team identifies for investigation and improvement through data analysis. It is not necessarily the same as an instructional focus. **Standards:** Guidelines established by state or federal education authorities that outline the knowledge, skills, and competencies students are expected to achieve. **Suitability:** The appropriateness of the data inquiry focus for the team's grade level, content area, and the students' prior learning and strengths.

Indicator | Alignment of Meeting Activities

Alignment of Meeting Activities measures how well the activities in the observed team meeting address the data inquiry focus. In a meeting with strong alignment, discussions and decisions are directly linked to achieving the shared vision. Alignment is characterized by the consistent use of terminology related to goals and objectives, indicating a unified understanding and approach among team members (Nelson, 2009).

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Meeting activities are largely misaligned with the focus for data inquiry. There is minimal time devoted to relevant tasks, with significant portions of the meeting spent on unrelated activities or off-task discussions.	Meeting activities are somewhat aligned with the focus for data inquiry, although there may be occasional deviations. Although relevant tasks are addressed, the meeting may also include off-topic discussions or activities that do not directly contribute to the intended data inquiry focus.	Meeting activities are clearly and consistently aligned with the focus for data inquiry. The majority of the meeting is devoted to activities and discussions that contribute directly to the intended data inquiry focus. The team effectively uses the allotted time to achieve the meeting's objectives.

Key Terms
Aligned/Misaligned: The degree to which the activities in a meeting are directly connected to the data inquiry focus and support the team in achieving its objectives.

Construct | Data Use

Data Use involves using a wide range of data or other forms of evidence for understanding teaching and learning. Data could include quantitative student performance data, classroom observations, and teacher reflections (Boudett et al., 2020; Mandinach & Gummer, 2016). Evidence can include What Works Clearinghouse practice guides, research summaries or briefs, articles published in peer-reviewed journals, and other kinds of research evidence.

This construct has six indicators: **Appropriateness**, **Data Engagement**, **Equity-Focused Data Use**, **Accuracy of Data-Related Terms**, **Substantiated Interpretations**, and **Collective Next Steps**.

Indicator | Appropriateness

Appropriateness of data captures the suitability of the data or evidence types chosen by the team for addressing the data inquiry focus. Types of data may include student test data, teacher observations, student work, teacher reflections, and others. Types of evidence may include practice guides or peer-reviewed journal articles.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
There is no data or other form of evidence available to team members at the meeting, or the data is not suitable for the focus for data inquiry or meeting objective.	There is some data or evidence available to team members at the meeting. However, the data or evidence may not be consistently referenced or used throughout the discussion, and its connection to the educational task or question is only partially clear. Additional or alternative data or evidence sources would be more relevant or suitable for the data inquiry focus or meeting objective.	Relevant and suitable data or evidence from multiple sources is readily available to team members during the meeting. Team members refer to the data or evidence throughout their discussion, and the data is clearly appropriate for the data inquiry focus or meeting objective.

Key Terms
Appropriateness of Data: How well the data or evidence aligns with the meeting's focus or objective. It must be relevant, accurate, and suitable for the team's grade level, content area, or student population, offering actionable insights to support informed decision making.

Indicator | Data Engagement (*)

Data Engagement measures the depth and quality of the team's data inquiry activities during meetings, including analysis, questioning sources, and considering limitations and implications.

The (*) mark indicates that the **Data Engagement** indicator could be weighted more heavily, if necessary, when rolling up indicator-level scores to the construct level on the Observation Rubric.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
There are no data inquiry activities (discussion, review, analysis) of data sources or other forms of evidence.	Some data inquiry activities occur, but they are surface-level, focusing more on raw numbers than on understanding the underlying meaning, implications, or potential data limitations.	At least one data inquiry activity is substantive, with team members actively making meaning from the data or evidence, questioning the sources, considering data limitations, and/or exploring implications.

Key Terms
Data Inquiry Activities: The discussion, review, and analyses of data by instructional teams.
Surface-Level: Basic or superficial interactions with data, such as merely reviewing raw numbers or focusing on what the data shows without exploring why it shows that or what actions to take.
Substantive: Thorough and meaningful interactions with data, including interpreting its underlying meaning, critically analyzing its sources and limitations, and exploring its implications; reflects a deeper effort to make the data actionable and relevant to the team's goals.

Indicator | Equity-Focused Data Use

Equity-Focused Data Use assesses to what degree team members use data to identify and address inequities in learning opportunities for specific groups of students. Strong equity-focused data use moves beyond "gap-gazing," or focusing only on average differences in achievement among groups, to identifying strategies to ensure that all students have the supports and opportunities they need to learn and achieve.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Data inquiry activities (discussion, review, analyses) do not consider inequities affecting marginalized student groups; there is little to no discussion	Equity is acknowledged, and some data inquiry activities highlight disparities or the needs of marginalized groups, but discussions remain surface-	The team uses data to identify and address inequities affecting marginalized groups. Discussions are substantive and asset-based, focusing on how the

Emerging	Developing	Proficient
about how resource decisions might impact students differently, and disparities in student outcomes are neither identified nor addressed. Alternatively, conversations may reflect a deficit-based approach, in which disparities are viewed as deficiencies in students rather than as indicators of inequitable support or resources.	level. The team recognizes inequities but does not substantively engage in analyzing or using these insights to inform decisions or actions.	team can improve support, resources, and systems to better serve all students.

Key Terms
Equity-Focused Data Use: Using data to identify and address barriers or gaps in learning opportunities for different groups of students, with a focus on vulnerable or marginalized student groups, as defined by the school or data team.
Marginalized Student Groups: Any subset of students who experience barriers to academic success. These barriers may stem from socioeconomic status, language proficiency, race, ethnicity, special education needs, gender, immigration status, or other characteristics that may result in inequitable access to resources, opportunities, or support. Marginalization can vary depending on the school context and community.
Deficit-Based Approach: A focus on what individuals or groups lack—skills, knowledge, resources, or capabilities. It often attributes challenges to inherent weaknesses or inadequacies within the individual or group. It focuses on fixing perceived shortcomings rather than leveraging existing strengths (e.g., "These students are behind because they lack the necessary support at home").
Asset-Based Approach: A focus that emphasizes the strengths, resources, and potential that individuals or groups bring and aims to build on these assets to address challenges and create opportunities. It focuses on opportunities and solutions rather than problems and deficits (e.g. highlighting bilingual students' ability to navigate multiple languages as a cognitive and cultural strength rather than a barrier).

Indicator | Accuracy of Data-Related Terms

Accuracy of Data-Related Terms assesses how well team members understand and use specific data-related vocabulary, such as statistical terms, data analysis concepts, and education metrics.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Team members do not use terms relevant to data analysis and interpretation of data or evidence, and/or use them inaccurately.	Team members use some terms relevant to data analysis or interpretation of data or evidence accurately, but there is evidence of confusion or	Team members consistently use terms relevant to data analysis or interpretation of data or evidence, including technical terms, correctly and effectively. Team members have a clear

Emerging	Developing	Proficient
	inconsistency in their application.	understanding of these terms and apply them accurately in the context of the discussion.

Key Terms
Data Terms: Words or phrases commonly used in the context of data inquiry to describe key concepts, metrics, or processes (e.g., benchmark, proficiency, formative assessment, percentile, standard deviation).

Indicator | Substantiated Interpretations

Substantiated Interpretations evaluates the accuracy and relevance of conclusions drawn from data within the context of the team's goals and analysis.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Interpretations and/or conclusions drawn from data or evidence are unsupported, inaccurate, or not relevant to the focus for data inquiry or meeting objectives.	Interpretations and/or conclusions drawn from data or evidence are generally accurate and at least partially supported by the data or evidence, but are not fully aligned with the data inquiry focus or meeting objectives.	Interpretations and/or conclusions drawn from data or evidence are accurate, fully supported by the data or evidence, and fully aligned with the data inquiry focus or meeting objectives.

Key Terms
Substantiated Interpretations: A conclusion or interpretation that is supported by evidence and reasoning and grounded in data. Such interpretations avoid speculation, misrepresentation, or overgeneralization.

Indicator | Collective Next Steps

Collective Next Steps assesses whether and how well the team translates data or evidence insights into practical, executable steps, which may include gathering additional data or restructuring data.

This indicator differs from the Accountability for Instructional Application indicator under Application of Learning in that it centers on the team's collective action and can be related to any topic, rather than focusing on individual accountability and instruction.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
No next steps are discussed during the meeting, or next steps are unrelated to the team's review, discussion, or analysis of data.	Next steps for the team are discussed but only partly related to the team's review, discussion, or analysis of data. Next steps are not well defined; for example, it may be unclear who is responsible for the action, when it will be completed, or how it aligns to the team's goals.	Next steps for the team are firmly grounded in the team's review, discussion, or analysis of data. Next steps are clearly defined, actionable, and relevant to team goals. Actions are measurable and time-bound.

Construct | Constructive Dialogue

Constructive Dialogue refers to how team members communicate with one another, particularly the interactions among team members that promote deeper understanding, critical analysis, and effective problem-solving. This construct has three indicators: **Relational Trust**, **Idea Development**, and **Transparency of Practice**.

Indicator | Relational Trust

Relational Trust captures the level of comfort and security team members feel in openly expressing their views and the degree to which they believe they can rely on one another to engage respectfully and supportively during challenging conversations.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Team members avoid conflict or disagreement; they change the subject when difficult topics arise or avoid answering probing questions. Alternatively, there may be signs of open hostility or tension.	Some team members ask probing questions, raise difficult topics, and/or disagree with each other. Although responses may involve mild defensiveness or hesitation, the group continues the dialogue. There are no signs of open hostility or tension.	Team members openly address and discuss difficult topics, including direct challenges to ideas and approaches, in a way that pushes collective thinking forward. If disagreement occurs, the group remains collaborative, and members show willingness to be open, honest, and receptive to feedback.

Key Terms
Relational Trust: The level of openness, respect, and support among team members when addressing difficult or challenging topics.
Disagreement: An exchange of differing ideas, opinions, or perspectives between two or more people, without necessarily involving conflict or tension.

Indicator | Idea Development (*)

Idea Development measures the extent to which team members utilize one another's contributions in the discussion, incorporating others' ideas into their own responses to build collective knowledge. In meetings characterized by strong idea development, members contribute to the conversation by acknowledging, responding to, and integrating others' ideas, questions, and feedback as well as asking for or providing additional evidence or perspectives that enrich the discussion.

The (*) mark indicates that the **Idea Development** indicator could be weighted slightly more heavily in cases where an observer is struggling to decide a score when rolling up indicator-level scores to the construct level, to help push you to one score point over another.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Contributions are mostly isolated, with minimal effort to build on or develop others' contributions or ideas. Discussions are disjointed, and there is little evidence of progression toward deeper understanding, combining information into new insights, or collective knowledge.	Team members occasionally build on others' contributions or ideas but miss opportunities to do so. Discussions lack focus and do not consistently result in deeper understanding, combining information into new insights, or collective knowledge.	Team members consistently build on others' contributions in a way that deepens understanding, challenges ideas, and/or leads to combining information into new insights. Discussions are focused and advance toward deeper understanding or collective knowledge.

Key Terms
Idea Development: Effective idea development involves moving beyond isolated comments to create focused discussions that synthesize information, uncover new insights, and drive progress toward shared goals. It necessitates building on one another's ideas and contributions in a group conversation to deepen understanding, challenge assumptions, and generate collective knowledge. **Collective Knowledge:** A shared understanding of something, developed collaboratively by a group.

Indicator | Transparency of Practice

Transparency of Practice focuses on the willingness of team members to share specific, candid insights about their own teaching or teaching that they have observed. Meetings characterized by transparency of practice include open sharing of teaching methods, classroom challenges, and instructional strategies among team members. This includes willingly discussing one's own and one another's practices and providing honest feedback to foster a culture of collaborative learning.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Team members do not share specific details of instructional practices or interactions with students (either their own or practices they have observed). Discussions about practices tend to be vague, generic, or limited to surface-level challenges without meaningful reflection.	Team members may share specific examples of instructional practices or interactions with students (either their own or practices they have observed), but these disclosures are selective (limited to positive examples only) and do not support reflective analysis of teaching methods and outcomes.	One or more team members openly share detailed, specific examples of instructional practices or interactions with students (either their own or practices they have observed). The discussion focuses on reflective analysis of teaching methods and outcomes and aims to foster collective learning or improvement.

Key Terms
Transparency of Practice: The willingness of team members to share specific, candid insights about their teaching practices or materials, including successes and challenges. Teachers may also share candidly about other teachers' practices they have observed as part of their data inquiry cycle.

Domain 3 | Team Member Investment

What Is This Domain?

Team Member Investment considers individual contributions of team members, distinct from collective actions. While the domain of Collaborative Inquiry is focused on team efforts and joint actions, Team Member Investment is about the involvement and engagement of individual educators in the process.

Team member investment can have substantial influence on collective efforts. Engaged teachers often bring new ideas, ask challenging questions that push thinking, and model reflective practices that can influence the team's culture and dynamics. These behaviors contribute to the other domains as well as to the overall success of the program (and, therefore, the outcomes).

The domain of Team Member Investment has three key constructs: **Active Contribution**, **Distributed Agency**, and **Application of Learning**.

Construct | Active Contribution

Active Contribution assesses individual inputs to the team meeting, including the frequency and relevance of suggestions, questions, and feedback provided by a team member. Active Contribution evaluates how individuals influence aspects of team functioning (Nelson et al., 2008; Vescio et al., 2008).

The Active Contribution construct has two indicators: **Preparation** and **Task Commitment**.

Indicator | Preparation

Preparation captures the readiness of team members for meetings. It can include team members coming to meetings prepared with the necessary data or having completed agreed-upon next steps from previous meetings.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Most team members are unprepared for the meeting, impeding meeting progress. Agreed-upon follow-up actions from previous meetings may be incomplete or inadequately addressed. It is not clear that team members understand how the day's meeting builds on past decisions.	Team members are partially or unevenly prepared for the team meeting. Follow-up actions from previous meetings may be unevenly completed, and there may be inconsistencies in how well team members understand how the day's meeting builds on past decisions.	Nearly all group members arrive fully prepared for the meeting. Follow-up actions from previous meetings are completed on time, and team members demonstrate a clear understanding of how the meeting builds on past decisions.

Key Terms
Preparation: The readiness of team members to participate effectively in the meeting by completing prior commitments, bringing necessary materials or data, and demonstrating an understanding of how the meeting connects to previous discussions and decisions.

Indicator | Task Commitment

Task Commitment assesses the willingness of team members to take on responsibilities and follow through. Individual team members demonstrate task commitment by volunteering for tasks, accepting responsibilities, and committing to follow-through on action items identified during the meeting (Little, 2003).

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
There is little to no volunteering for responsibilities; tasks may be left incomplete due to a lack of commitment. Alternatively, one team member may consistently volunteer for all tasks.	Some team members volunteer for tasks or roles, but volunteering is inconsistent across the team. Team members may sometimes require prompting from others before they offer to take on a task or role.	Members actively volunteer for tasks and roles, resulting in distribution of tasks among team members; responsibilities are readily accepted, and members are proactive in identifying areas where they can contribute.

Key Terms
Task Commitment: The willingness and follow-through of team members in volunteering for and taking ownership of tasks or responsibilities, including the equitable distribution of tasks and proactive identification of ways to contribute.

Construct | Distributed Agency

Distributed Agency captures whether and to what extent leadership and decision-making responsibility are shared among team members.

The Distributed Agency construct has two indicators: **Decision-Making Process** and **Equitable Participation**.

Indicator | Decision-Making Process

Decision-Making Process examines how team members contribute to team decisions and how decision-making is distributed. In meetings characterized by strong decision-making processes, those processes are transparent to the observer, the meeting facilitator proactively solicits input from all team members, and multiple team members contribute to decisions made during the meeting.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
The decision-making process is not clear, and most team members have little influence on the outcomes. Alternatively, the meeting may end without decisions being made.	The decision-making process is somewhat clear, and/or there may be imbalances in how much weight different members' input carries.	The decision-making process is clear, and all members have meaningful input. Perspectives are actively considered in reaching decisions.

Key Terms
Decision-Making Process: The clarity and inclusivity of how decisions are made within a team.

Indicator | Equitable Participation

Equitable Participation assesses the distribution of speaking time across members. In meetings characterized by equitable participation, most or all team members actively participate in discussions, ask questions, provide feedback, and contribute ideas (Nelson et al., 2012).

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
One or two people dominate the conversation, limiting the opportunity for other members to contribute. The pattern of dialogue is unbalanced, with many voices not being heard.	Participation is spread out among multiple members, but some voices remain silent or contribute minimally.	All members consistently engage in discussions.

Key Terms
Equitable Participation: The extent to which all team members are engaged in meaningful dialogue and have balanced opportunities to contribute during team discussions.

Construct | Application of Learning

Application of Learning captures the extent to which individual team members apply insights from the team meeting to their classroom practice.

The Application of Learning construct has two indicators measured by the Instructional Team Meeting Observation Rubric: **Instructional Application** and **Accountability for Instructional Improvement**.

This construct has two additional indicators only measured by the Team Meeting Exit Ticket: **Responsiveness** and **Integration of Insights**. Because these indicators capture team members' attitudes toward and past efforts in applying the insights from team meetings, they are only captured by the Exit Ticket.

Indicator | Instructional Application

Instructional Application evaluates how clearly and substantively the team builds on data and insights from the meeting to make decisions about the logical next steps for instructional strategies or classroom practices.

Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Little to no discussion occurs around how data insights or meeting discussions might influence or change classroom instruction or teaching practices. Instructional implications, if mentioned, are vague or superficial.	Team members discuss potential instructional implications of data insights or meeting discussions, but connections to specific classroom practices or strategies are general, are inconsistent, or lack sufficient detail to guide implementation.	Team members explicitly and substantively connect data insights and meeting discussions to specific instructional strategies or practices.

Key Terms
Instructional Application: The extent to which a team translates data insights and meeting discussions into concrete instructional decisions for the team or their own classrooms.

Indicator | Accountability for Instructional Application

Accountability for Instructional Improvement captures the extent to which individual team members commit to making changes to their instruction or classroom practices, and/or the extent to which they have already made these changes. It focuses on how accountable team members are to their team to set and follow through with these instructional commitments.

In contrast with the Integration of Insights indicator under the same construct, this indicator focuses on following through on these steps with the team, instead of individual insights. Similarly, this indicator differs from Collective Next Steps under Data Use in that the focus is on individual accountability, instead of the team's collective action, as well as on instruction. The focus can be broader under Collective Next Steps.

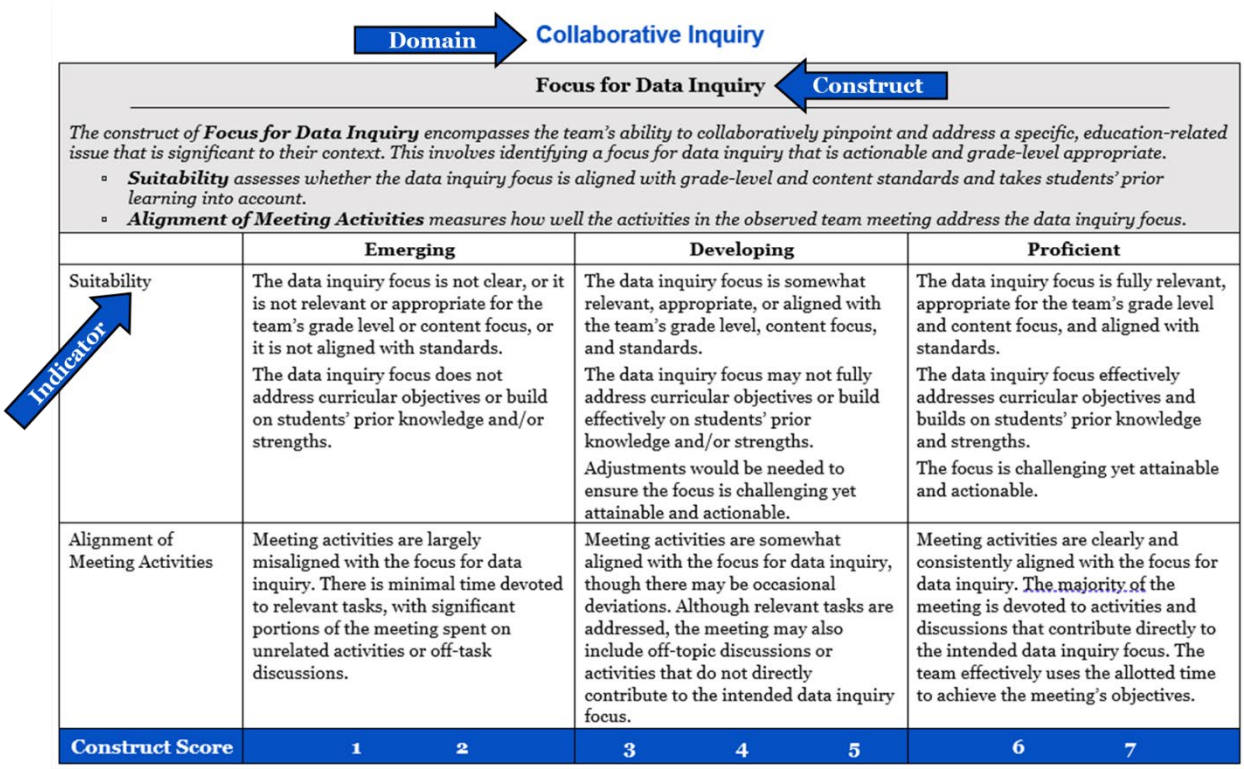
Practice Levels, Descriptors, and Key Terms

Emerging	Developing	Proficient
Team members do not commit to taking specific instructional steps or to making adjustments to their instruction, or only one team member does so and others do not reciprocate with their own commitments. OR Team members do not report back on specific instructional steps or adjustments they have taken.	Multiple team members describe instructional steps or adjustments they may implement, but the descriptions are vague or lack detail, and the extent of their commitment is not clear. OR Multiple team members report on instructional steps or adjustments they have taken, but their descriptions are vague or lack detail, and it is not clear what team members have learned from the experience.	Multiple team members articulate specific, actionable instructional steps or adjustments they plan to implement. These team members explicitly commit to the team their plans for taking these next steps. OR Multiple team members report on specific instructional steps or adjustments they have taken and reflect on their effectiveness or on what they have learned.

Key Terms
Instructional Steps: Specific actions that teachers commit to trying or have taken in their classrooms based on team discussions and data insights. These steps can include planning new approaches or implementing new strategies.

Scoring Collaborative Data Inquiry Meetings

As described in the previous section, each domain in the Instructional Team Meeting Observation Rubric is divided into several constructs, and each construct (e.g., **Focus for Data Inquiry** in the screenshot below) comprises multiple indicators (e.g., **Suitability**). The Observation Rubric describes each indicator at three performance levels: **Emerging, Developing**, or **Proficient**. The indicator scores are rolled up into construct-level scores, as described below. This section provides instructions for scoring both indicators and constructs.



Score the Indicators First

At the end of an observation, compare what you have observed during the meeting to each of the three indicator descriptors to determine which one most aligns with what you have seen. If the observed behaviors fully align with the criteria of a given level (Emerging, Developing, or Proficient), assign that level to the indicator. If the behavior observed falls between two levels and does not fully meet the higher level's criteria, select the lower level.

For scoring examples, review Appendix A as well as the CDI Practitioner Toolkit's Training Slide Deck. The deck includes an introduction to the Observation Rubric as well as eight example scenarios. The slides can be used independently or as part of new observer training.

Next, Score the Constructs

After you have scored each of the indicators, rate the overall construct from 1 to 7, with 1 being the lowest score and 7 the highest. When assigning construct-level scores, use the entire rating scale. Don't reserve scores of 7 or 1 for extreme cases or to signal that there is always room for improvement. Both ends of the scale (1 and 7) should be attainable scores.

Begin by reviewing the levels assigned to all indicators under that construct. Next, review the construct description and consider both the individual indicator scores and a holistic view of the construct when assigning the construct score.

In some cases, you may find that your indicator-level scores are evenly divided across categories. In those cases, you may choose to rate the indicator marked with an asterisk (*) more heavily in assigning a construct-level score. These "tiebreaker" indicators should **not** be weighted more heavily when rolling up to construct-scores if the indicator-level scores are not split equally.

Getting Started: How to Conduct an Observation

Before the Observation

- Schedule the observation with the meeting facilitator. Do not try to observe and facilitate a meeting at the same time.
- Review this User Guide and familiarize yourself with the behavioral indictors and constructs within the Instructional Team Meeting Observation Rubric. You can also score the example scenarios included in the Training Slide Deck to practice using the Observation Rubric.
- Print out the Observation Rubric for easy reference during the meeting and as you are scoring.
- Decide how you will administer the Exit Ticket (see details in the Team Meeting Exit Ticket section).

During the Observation

- Take low-inference notes on the team's discussions and behaviors, particularly those that pertain to the behavioral indicators in the Observation Rubric.
- Make note of the information listed on the first page of the Observation Rubric:
  - Date of meeting
  - Start time and end time
  - Focus of meeting (e.g., grade level, subject area)
  - Number of meeting participants

When assigning construct-level scores, **use the entire rating scale (1–7)**. Don't reserve 1s and 7s for extreme cases.

  - Professional roles of meeting participants
  - Which of the following sources of data or evidence did the instructional team discuss in this meeting?
  - Please describe unusual circumstances that affected the meeting (e.g., interruptions)
- Administer the Exit Ticket at the end of the meeting (see details in the Team Meeting Exit Ticket section).

How to Use the Team Meeting Exit Ticket

The Team Meeting Exit Ticket is designed to capture team members' perceptions of the observed meeting and their team's processes. This brief survey includes 14 questions aligned to eight CDI indicators under five constructs, along with one open-ended question. The Exit Ticket should be administered at the end of each observed team meeting and will take about 5 minutes for team members to complete.

Exit Ticket Measures

The table on the following page shows the exit items aligned to each indicator and construct. In order to keep the exit ticket short, these items generally address just one aspect of each indicator. Compared with the observation rubric, the exit ticket is focused on a narrower set of perceptions and behaviors, on a subset of indicators and constructs. To learn more about the related construct and domain for a given exit ticket question, click on the name of the construct or domain to review the descriptions provided in earlier sections of this User Guide. Team Meeting Exit Ticket Measures

Construct | Indicator	Indicator Definition	Exit Ticket Item(s)
Focus for Data Inquiry | Suitability	**Suitability** focuses on the alignment between the team's data inquiry focus and content standards, grade level, and students' prior learning.	• In general, my team has chosen to focus on issues that are tied to student outcomes. • Our team generally does a good job aligning our work with grade-level and content standards.
Data Use | Appropriateness	**Appropriateness** focuses on how well the data and evidence chosen by the team align with their focus of data inquiry. It considers whether the available data is relevant and useful to the team's instructional considerations.	• The data we examined today gave me useful insights into my students' learnings and/or into my own instructional practices. • In today's meeting, our team had access to data that supported productive discussion about important instructional issues.
Data Use | Collective Next Steps	**Collective Next Steps** captures the degree to which the team turns insights from their data discussions into clear, actionable steps.	• Our team has agreed on the next steps we will take based on our review, discussion, or analysis of data today.

Construct | Indicator	Indicator Definition	Exit Ticket Item(s)
		• I have a clear understanding of the next steps I will take after today's meeting.
Constructive Dialogue | Relational Trust	**Relational Trust** captures how safe team members feel in sharing their perspectives and how confident they are that others will respond with respect and support, even during disagreements.	• I feel comfortable expressing my views in team meetings, even when the topic is challenging.
Constructive Dialogue | Idea Development	**Idea Development** measures the extent to which team members utilize one another's contributions in discussions, incorporating others' ideas into their own responses to build collective knowledge.	• I feel that everyone on our team is working toward the same goal.
Distributed Agency | Decision-Making Process	**Decision-Making Process** describes how the team reaches decisions, highlighting whether the process is clear and collaborative and whether it allows multiple team members to contribute meaningfully.	• I have a voice in my team's decision-making process.
Application of Learning | Responsiveness	**Responsiveness** captures the extent to which team members are open to learning from and adapting their ideas and teaching methods based on the feedback and data shared during team meetings. Responsiveness is assessed only through the Team Meeting Exit Ticket because such attitudes can be difficult to observe during meetings.	• I learn things from the data and feedback shared during team meetings. • I learn things during team meetings that I would not have thought about on my own.
Application of Learning | Integration of Insights	**Integration of Insights** assesses the practical application of knowledge acquired from team discussions. It encompasses how insights from meetings are integrated into classroom practices and instruction. This indicator is assessed only through the Team Meeting Exit Ticket because such applications can be difficult to observe during meetings.	• I plan to make changes in my professional practice as a result of today's discussion. • I have made changes to my professional practice as a result of the discussions I have had with this team. • I believe that as a group, this team is improving teaching and learning for students.

Getting Started: How to Administer the Exit Ticket

The Team Meeting Exit Ticket should be completed by all team members in the last 5 minutes of an observed meeting. It is designed to complement the information collected by an observer using the Instructional Team Meeting Observation Rubric. The Exit Ticket is accessible as a PDF or Qualtrics template and should take about 5 minutes to complete.

Observers should distribute the Exit Ticket to team members in one or both of the following ways:

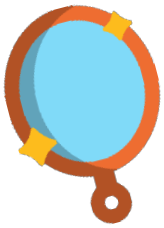
- If the meeting is virtual (e.g., on Zoom), use the Qualtrics template provided alongside the CDI Practitioner Toolkit to create an electronic version of the Exit Ticket and distribute the survey link in the chat at the end of the meeting. Note that this method requires creating a free Qualtrics account.
- Alternatively, create a Google form with the Exit Ticket items or print out copies of the Exit Ticket to be distributed at the end of the team meeting.

Next Steps: What to Do with Exit Ticket Data

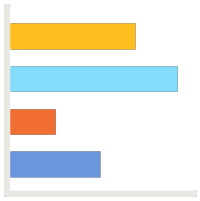
Once the observation is complete and exit ticket responses have been collected, team or school leaders can enter the data into the CDI Practitioner Toolkit Data Dashboard to visualize their results. These results are intended to support reflection on teams' CDI processes. The next section provides instructions for using the Data Dashboard, along with a Reflection Protocol that team, school, and district leaders can use to guide these conversations.

Make sure the meeting facilitator knows that **team members will need 5 minutes to complete the Exit Ticket** at the end of the

How to Use the Team Reflection Protocol and Data Dashboard



The CDI Practitioner Toolkit's Team Reflection Protocol is designed to support team, school, and district leaders in having productive conversations with teams about their scores from the toolkit. This instrument includes discussion questions to aid collective sense-making of the CDI data. A worksheet that includes these questions is also available to allow facilitators to guide the reflection conversation with ease and take meeting notes.



The CDI Practitioner Toolkit Data Dashboard is a key resource for these team conversations. The purpose of the Team Reflection Protocol is to establish dedicated time to reflect on the results from the Data Dashboard. The dashboard offers visual representations of toolkit scores using explicit construct domains, indicators, and point values; however, it is important that team members discuss their interpretation of the results and agree on a shared conclusion before determining next steps. As the Data Dashboard offers only one evidence source, the Team Meeting Protocol should include the identification of questions and additional evidence sources to explore, and not be an action plan for a problem to address. We also recommend completing multiple observations of a team before charting the data and scheduling a reflection conversation.

Getting Started: Populating Your Data Dashboard

- Download the Excel template file included in the CDI Practitioner Toolkit. Opening this file will create a local copy of the Data Dashboard on your device, which you can populate with your team's (or teams') data. You can upload data from only one school or team to the dashboard or populate it with results from multiple schools and teams across a district.
- Review the Read_Me sheet in the Data Dashboard for more details about how to use this instrument, how the workbook is organized, and how to troubleshoot any issues that may come up.
- Observe multiple team meetings at various time points, administering the Team Meeting Exit Ticket at the end of each meeting. For more details on how to conduct an observation, refer to the Instructional Team Meeting Observation Rubric and Team Meeting Exit Ticket sections of this User Guide.

- After each meeting, enter your observation scores into the Observation Rubric (OR) Data sheet of the Data Dashboard. Each observation should be represented by one row in this sheet.
- Enter the exit ticket scores from the meeting into the Exit Ticket (ET) Data sheet of the workbook. Each exit ticket response should be represented by one row in this sheet.
- As you add your data, the visualizations in the Data Dashboard will automatically update. Once all your data is in the workbook, you can share the Excel file directly with team members or save the graphs as PDF files.

Tips for Using the Data Dashboard

- You can use the Qualtrics template (.qsf file) provided alongside the CDI Practitioner Toolkit to easily create an online copy of the Exit Ticket for your use. The Data Dashboard is designed to accept the input from this template, which can help simplify the data entry process.
- The Data Dashboard uses macros to allow the visualizations to update automatically as you add or edit data in the workbook. Therefore, it is essential that you enable macros when using the Data Dashboard.
- The Data Dashboard includes filters that enable you to filter any visualizations by school or team. To allow this feature to function properly, ensure school and team names are spelled consistently across all rows in the Observation Rubric and Exit Ticket data entry sheets.

Getting Started: Facilitating the Reflection Meeting

- Schedule the reflection meeting. While your teams may have many participants, we recommend breaking your reflection into groups of 4–6 participants. It is important to create space for all voices and consider many perspectives as you make sense of the results.
- Review this User Guide and familiarize yourself with the behavioral indicators and constructs measured by the CDI Practitioner Toolkit.
- Provide all participants with the populated Data Dashboard before engaging with the Team Reflection Protocol. This gives participants additional time to understand the components of the visualizations as well as how the team, school, or district performed.

The recommended times in the Team Reflection Protocol are based on a group of 4–6 participants with a 45- to 60-minute meeting window. You are encouraged to reduce or extend the time based on the group size or other priorities.

- You can print out the worksheet version of the Team Reflection Protocol for easy reference during the meeting and as you are taking notes.
- During the meeting, facilitate a discussion around the team, school, or district results, referencing the visualizations from the Data Dashboard throughout the meeting.
  - The prompts in the protocol can be edited for depth or emphasis, but we encourage you to answer all prompts in the order provided.
- Chart, record, or take notes on discussions and decision making to support next steps.
- When possible, return to the *why*, or common purpose, of your shared work and how the activities within the protocol may contribute.

How to Use the Team Member End-of-Year Survey

The Team Member End-of-Year (EOY) Survey is designed to capture team processes and behaviors over time by asking about team members' experiences in CDI team meetings throughout an academic year. This instrument includes questions aligned with all eight CDI constructs. Team members are asked to rate the extent to which they agree with various statements or how often these statements were true for their team's meetings. The survey should be administered to all team members, even if they were not present at the team meetings that were observed. The EOY survey will take about 25 minutes to complete.

Construct	Construct Definition	Team Member EOY Survey Item(s)
Norms and Structures	**Norms and Structures** captures the foundational practices that shape team functioning, including routines and standard processes for how team members execute tasks.	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?* • I was clear on our meeting objectives at the start of the meeting. • We had enough time to meet our objectives. • Meeting with the team was a good use of my time. • We should have discussed more important topics instead of what we talked about. • Our meetings had clear expectations or norms.
Focus for Data Inquiry	**Focus for Data Inquiry** encompasses a team's ability to collaboratively pinpoint and address a specific, education-related issue that is significant to their context.	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?* • Our objectives were important for us to discuss together.
Data Use	**Data Use** assesses how effectively teams use data or other forms of evidence to drive improvements and achieve educational outcomes. It encompasses the selection of appropriate data or evidence types, the depth of engagement with the data or evidence, and the subsequent formulation	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?* • We reviewed data to help us achieve our objectives. • The data we discussed gave me useful insights into my teaching practice. • The data we discussed gave me useful insights into my students' learning needs.

Construct	Construct Definition	Team Member EOY Survey Item(s)
	of actionable steps based on data or evidence insights.	• I understood what the data we discussed measured. • We made factual observations about the data before we interpreted the data. • We reviewed disaggregated data of different student subgroups (for example, English learners). • We thoroughly understood the data we reviewed before discussing what actions to take. • We used data to better understand the strengths and assets of our students. • We discussed the biases we may have with interpreting data.
Constructive Dialogue	**Constructive Dialogue** refers to how team members communicate with one another, particularly the interactions among team members that promote deeper understanding, critical analysis, and effective problem-solving.	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?* • Our discussions helped us develop a shared understanding of what we need to do as a team. • When we disagreed, we did so respectfully. *How did you feel about collaborating with your instructional team on using data to improve student outcomes during this school year?* • My relationships with my team members are open and honest. • We provide strong social support for one another. • We respect one another's professional competence.
Active Contribution	**Active Contribution** assesses individual inputs to the team meeting, including the frequency and relevance of suggestions, questions, and feedback provided by a team member.	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?* • Most team members arrived well-prepared. • I was fully engaged in the discussions.
Distributed Agency	**Distributed Agency** captures whether and to what extent leadership and decision-making	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?*

Construct	Construct Definition	Team Member EOY Survey Item(s)
	responsibility are shared among team members.	• Everyone in the meetings contributed to meeting our objectives. *How did you feel about collaborating with your instructional team on using data to improve student outcomes during this school year?* • We have a great deal of cooperative effort among staff members.
Application of Learning	**Application of Learning** captures the extent to which individual team members apply insights from team meetings to their classroom practice.	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?* • I left the meeting knowing what my next steps were. • I did something different in my classroom because of our meeting. • We made more progress during our meeting than I would have on my own.
Perceptions of Meeting Effectiveness	**Perceptions of meeting effectiveness** captures team members' feelings about team structures and effectiveness. This construct is assessed only through the EOY Survey, as such feelings can be difficult to observe during meetings.	*How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year?* • I did not understand the connection between the data we discussed and our meeting objectives. • I left the meeting without learning something new. • I left feeling frustrated with our lack of progress.

Getting Stated: How to Administer the EOY Survey

The Team Member End-of-Year Survey should be completed by all team members toward the end of the school year during which their meeting(s) were observed. It is designed to complement the information collected through the Exit Ticket by capturing team members' reflections on their CDI team's processes and progress over the course of the year. The EOY Survey is available as a PDF and takes approximately 25 minutes to complete.

Team, school, or district leaders can administer the survey by distributing printed copies to team members. To encourage candid feedback, respondents should be asked not to include their names or other identifying information on their survey. Alternatively, team leaders can program and distribute the survey electronically using a platform such as Qualtrics.

We recommend allowing approximately four weeks for survey completion and sending weekly reminders to encourage participation. Based on implementation in two districts, leaders can expect an approximate response rate of 60%.

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Appendix A: Scoring Examples

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The scenarios below illustrate situations observers might encounter during team meetings and the corresponding scores these teams might receive on the Instructional Team Meeting Observation Rubric. These examples are intended to provide additional context and guidance as observers begin using the toolkit.

We recognize that it can be challenging to understand all the nuances of a team meeting from a brief scenario. Thus, your ratings for a given scenario may differ from those assigned by the design team. If differences arise, we encourage you to reflect on why the scores may differ and what additional evidence could support your rating decisions.

Team Structures and Culture | Norms and Structures

Indicator | Protocols

Level	Scenario
Emerging	A fourth-grade team expected to receive data to review before their weekly meeting, but because of a miscommunication, team members did not receive it ahead of time. During the meeting, the facilitator walked the team through the data and opened the floor for discussion. However, team members were unsure how to respond because they did not know how to engage in a discussion about the data.
Proficient	A fourth-grade team focused their weekly meeting on a report with data from the recent state assessments. The principal provided the team with a protocol on how to review the text, which helped them pull out key trends and interpretations from the data. The team followed the protocol throughout the meeting to move discussions forward, allowing the meeting to end with clear decisions about next steps.

Indicator | Fidelity of Implementation

Level	Scenario
Developing	An elementary school leadership team attended professional learning about the Data Wise Framework. At one of their meetings, they reviewed student work with the goal of generating a statement about what is working and not working for students, which is called a “learning-centered problem” in the Data Wise Framework. However, the team occasionally called this statement a “problem of practice,” which is a different Data Wise idea that summarizes what is working and not working in teachers’ instructional practices. The facilitator did not catch or correct this varying use of terminology.

Level	Scenario
Proficient	An elementary school leadership team attended professional learning about the Data Wise Framework. At one of their meetings, the facilitator opened the meeting by explaining that they were in Step 4 of Data Wise, "Dig into Evidence of Learning." The facilitator handed out a protocol worksheet and said that they would examine student work to come up with a "learning-centered problem" by the end of the meeting.

Indicator | Time on Task (*)

Level	Scenario
Developing	The meeting for a high school science instructional team started 5 minutes late but ended as scheduled. Although the conversation mainly centered on the predetermined focus of the meeting, the team occasionally got sidetracked and had to be reminded to adhere to the meeting agenda. Most of these tangents were around unrelated housekeeping discussions.
Proficient	Prior to a high school science instructional team's meeting, the facilitator shared an agenda with the team. All team members were in the meeting room by the listed start time, and the team adhered to the agenda throughout the meeting. Discussions focused on the data and wrapped up by the scheduled time.

Collaborative Inquiry | Focus for Data Inquiry

Indicator | Suitability

Level	Scenario
Emerging	A middle school math team selected "fluency in addition and subtraction" as their data inquiry focus. While some students do struggle with fluency, most students (~80%) showed mastery of multi-step equations and fractions in their assessment data. The curricular objectives focused on common factors, fractions, algebraic expressions, and geometry.
Proficient	A middle school math team selected "solving multi-step algebraic equations" as their data inquiry focus. Grade-level standards emphasized understanding and solving linear equations, which was identified as a challenge for about 70% of students in recent assessments. Students demonstrated mastery of single-step equations and operational fluency.

Indicator | Alignment of Meeting Activities

Level	Scenario
Emerging	A fifth-grade team met to analyze recent assessment data related to geometric reasoning to identify areas where students struggled and plan targeted interventions. The first 20 minutes of the meeting were spent discussing logistics for an upcoming field trip. When reviewing the assessment data, team members veered into a

Level	Scenario
	discussion about managing a student's classroom behavior and shared anecdotes. Only 10 minutes of the hour-long meeting were spent discussing the assessment data, with no clear decisions or next steps aligned to the original meeting goal.
Developing	A fifth-grade team met to analyze recent geometric reasoning assessment data to identify areas where students struggled and plan targeted interventions. The team began by analyzing the data and discussing potential strategies to support students. However, midway through, the conversation drifted into a lengthy discussion about the logistical challenges of scheduling parent-teacher conferences. Although related to school operations, this discussion was not directly tied to the data inquiry focus and took up valuable meeting time. The facilitator eventually brought the team back to the intended focus, but the deviation reduced the time available for deeper analysis and actionable planning.

Collaborative Inquiry | Data Use

Indicator | Appropriateness

Level	Scenario
Emerging	Before an instructional team meeting for a high school social sciences team, the principal shared that the meeting focus would be the state exam results. However, most teachers did not know how to access the data, so they were not able to review the information ahead of time. In response, the principal tried to pull up the data at the meeting, but the system did not work. This caused discussions to proceed without referencing any data.
Proficient	At a meeting for a high school social sciences team, the facilitator brought a data set for the team to review and discuss together. This data set was selected based on the meeting goal collectively set at a previous meeting. All the teachers on the team also had access to data specific to their classrooms, which they pulled up as needed to further guide the conversation.

Indicator | Data Engagement (*)

Level	Scenario
Developing	A literacy team reviewed assessment data to identify areas for improvement in students' reading comprehension. The team noted that 40% of students scored below the proficiency threshold. They discussed their feelings about this proficiency level but did not delve into possible reasons behind the low scores, such as the complexity of the test passages, instructional gaps, or student engagement during testing. The team did not question the validity of the inferences they could draw from the data (e.g., whether the test aligned with their curriculum) or explore whether other data sources (e.g., student work samples or teacher observations) could provide additional context.

Level	Scenario
Proficient	A literacy team reviewed assessment data to identify areas for improving students' reading comprehension. The team began by analyzing the 40% of students who scored below the proficiency threshold, specific to subgroups (gender, English learners, etc.) to identify patterns or disparities. As part of this conversation, they questioned whether certain test items may have been culturally or linguistically biased, and then determined which additional data sources, such as student work samples or classroom observations, may corroborate or challenge the patterns identified in the assessment data. Based on the results of this future analysis, the team planned to consider revising the pacing guide to allocate more time to comprehension strategies.

Indicator | Equity-Focused Data Use

Level	Scenario
Emerging	A literacy team reviewed assessment data that showed a significant gap in reading comprehension scores between English learners (ELs) and their peers. The team noted that ELs scored, on average, 20 points lower than their peers. The team attributed the gap to factors such as limited exposure to English at home. The team did not explore how instructional practices, curriculum design, or resource allocation may be contributing to the disparities, nor did the team propose any specific actions to address the performance gap.
Proficient	A literacy team reviewed assessment data that showed a significant gap in reading comprehension scores between English learners (ELs) and their peers. They noted that the scores highlight an opportunity to provide additional support for ELs to build fluency. The team critically examined the data and passages in the exam itself, wondering if factors such as vocabulary or topics of reading passages about which students may have limited background knowledge (e.g., ice-skating) may have influenced the comprehension results. The team also discussed possible strategies to address these disparities, such as how to leverage the strong oral language skills of ELs, incorporating partner discussion activities that build background knowledge and vocabulary of texts.

Indicator | Accuracy of Data-Related Terms

Level	Scenario
Emerging	A social studies team reviewed data from a recent districtwide assessment on civics. During the discussion, a team member referred to "median" when they meant "mean," and another confused "formative assessment" with "summative assessment." These misuses led to misunderstandings among the group in interpreting the data. Because terms were not used correctly or consistently, the team's discussion remained shallow. Members talked past one another or offered vague suggestions, such as "We need to help students do better," without pinpointing specific skills or concepts to target.

Level	Scenario
Proficient	A social studies team reviewed data from a recent districtwide assessment on civics. The team accurately interpreted and used terms relevant to the test data, such as "proficiency levels," "standard deviations," and "item difficulty." For instance, a member noted, "It looks like students struggled on questions where they had to reference multiple sources." When discussing possible next steps for data analysis, the team used concepts and terms such as "validity" and "triangulation." For example, a team member suggested that they "triangulate this data with our formative assessments" as a possible next step.

Indicator | Collective Next Steps

Level	Scenario
Developing	At the end of the weekly meeting for a middle school instructional team, the team decided on five next steps, each assigned to a team member. Although a few were related to the data discussion, two were unrelated housekeeping tasks. The team did not set a due date for any of the next steps.
Proficient	Based on their data inquiry at their instructional team meeting, a high school arts team set next steps that were assigned to different teachers and the principal. Each next step was broken down into smaller tasks as needed, such as collecting more data on availability of certain art supplies. All team members agreed to complete their assigned steps by the next team meeting.

Collaborative Inquiry | Constructive Dialogue

Indicator | Relational Trust

Level	Scenario
Emerging	A high school science team met to review recent data on student performance in a unit on chemical reactions. The data revealed significant disparities in students' understanding of concepts across classes. Although it seemed that everyone had noticed this trend in the data, no one mentioned it, and the topic was avoided. A teacher raised a concern about inconsistencies in how lab activities were being conducted across classrooms. Rather than addressing the issue, another team member responded with vague statements like, "We all have different teaching styles," and no further discussion occurred.
Proficient	A high school science team met to review recent data on student performance in a unit on chemical reactions. The data revealed significant disparities in students' understanding of concepts across classes. One teacher acknowledged the data, saying, "It looks like my students struggled more than others with balancing equations. I'd love to hear how others approached this topic." Another teacher offered to walk through her materials and how she approached the topic. Another team member suggested that some differences in lab implementation—such as access to materials and prep time—might also be a factor and asked how these may be better standardized. Team members listened actively, made eye contact, and offered suggestions without placing blame.

Indicator | Idea Development (*)

Level	Scenario
Emerging	A cross-departmental high school instructional team, which included teachers from various subject areas, met to discuss ways to improve literacy across the curriculum. Teachers across subject areas shared isolated observations. A science teacher said, "I assign students articles about scientific discoveries, but they rarely summarize them correctly." A social studies teacher commented, "In my class, students struggle with historical texts, but I just tell them to reread until they understand." Teachers did not build on one another's points or explore potential common strategies. When the principal asked, "What strategies could we implement to address these literacy challenges?" team members responded with unconnected ideas, such as assigning more homework or holding students accountable for participation. Each member focused on their individual classroom issues, with no effort to combine insights or develop shared strategies across the team.
Proficient	A cross-departmental high school instructional team, which included teachers from various subject areas, met to discuss ways to improve literacy across the curriculum. The team was focused on creating an action plan to support students with explaining their reasoning while speaking and writing. The facilitator asked each teacher to share how they currently teach this skill in their classrooms. The mathematics teacher explained how she has students work in pairs on complex problems, where students explain their reasoning to a partner before collaborating to write a joint response. Teachers from other departments were interested in this strategy and asked the math teacher to give more detailed examples. A specialist working with English learners built on this idea by offering a set of sentence starters that he used to support students in sharing their reasoning. The notetaker wrote down examples of this strategy for the team to consider in their action plan.

Indicator | Transparency of Practice

Level	Scenario
Emerging	Throughout the meeting of a literacy instructional team at an elementary school, discussions focused on a data set the principal presented. Despite the principal's suggestions, the teachers did not share any examples from their classrooms and focused exclusively on the numbers being presented. The few descriptions of classroom practice were surface-level and thus did not advance the team's collective thinking.
Proficient	At an elementary school language arts team's meeting, the teachers' conversations around a data set revealed a gap in students' understanding of two concepts. To support the discussion, all team members shared specific examples of both challenging and successful lessons they had led on these topics. Their discussions were reflective, and the next steps they decided on were shaped by how their experiences related to the data.

Team Member Investment | Active Contribution

Indicator | Preparation

Level	Scenario
Emerging	Before a meeting for a third-grade instructional team, the facilitator shared the meeting agenda with the teachers, linking to specific documents to review beforehand. However, only one of the 10 teachers had time to complete this pre-work. This became apparent in the discussions, and some meeting time had to be repurposed to summarize the information from the pre-work documents, which reduced the time available for data inquiry.
Proficient	At a third-grade instructional team meeting, discussion started with teachers sharing their progress on a new instructional strategy they tried as a next step from previous meetings. As part of this conversation, the team also reviewed data from the newest quiz they had administered. Teachers used their learnings from the follow-up task and referred to ideas from previous meetings to enrich their conversation.

Indicator | Task Commitment

Level	Scenario
Emerging	At an elementary school math team meeting, the team wrapped up their conversation by outlining a series of tasks to be completed as next steps. When the principal asked whether anyone would like to volunteer, none of the teachers spoke up, so the principal ended up taking on majority of the tasks. No one pointed out that a few tasks were not assigned to be completed.
Developing	At the end of the meeting for an elementary school math team, the facilitator suggested assigning roles such as notetaker and timekeeper for the next team meeting. Only a select few team members volunteered to take on roles, which required some roles to be assigned. When discussing and assigning next steps, a similar process happened where only the same three teachers volunteered for tasks.

Team Member Investment | Distributed Agency

Indicator | Decision-Making Process

Level	Scenario
Developing	During a middle school science instructional team meeting, the team discussed how to better support their students who had low attendance. The team ended up deciding on a few strategies, but the decisions relied more heavily on the views of the instructional coach and the principal. Although all teachers contributed, the viewpoints of two members in leadership roles disproportionately shaped the final decision.

Level	Scenario
Proficient	Throughout a middle school science instructional team meeting, the team discussed how to better support their students who had low attendance. The facilitator prompted the group to weigh the options against the student attendance data, school policies, student characteristics, and instructional goals. The team discussed trade-offs, asked clarifying questions, and synthesized input. The group reached a clear decision that reflected collective input rather than a single voice.

Team Member Investment | Application of Learning

Indicator | Instructional Application

Level	Scenario
Emerging	A high school science instructional team met to discuss how to improve students' understanding of gravity. After reviewing data from recent quizzes, state tests, and student artifacts from classroom experiments, they noticed that students in classrooms where teachers first demonstrated the relevant experiment in the curriculum showed improved understanding of the topic. One teacher commented, "That's interesting. I might try that sometime." The team then moved on to reviewing other test scores, without further discussion about how to adapt instruction or curriculum based on this insight.
Proficient	A high school science instructional team met to discuss how to improve students' understanding of gravity. After reviewing data from recent quizzes, state tests, and student artifacts from classroom experiments, they noticed that students in classrooms where teachers first demonstrated the relevant experiment in the curriculum showed improved understanding of the topic across all the data sources. The team discussed why the demonstration might support student understanding, revised their shared curriculum to include it, and agreed to dedicate class time for this activity.

Indicator | Accountability for Instructional Application

Level	Scenario
Developing	Based on their review of data during their instructional team meeting, a middle school math team determined that students needed more support on a unit from the curriculum. One teacher shared that they created a new handout and used it in class, noting it seemed helpful without elaborating on why. A few other teachers commented that they might try the handout in their classrooms but did not specify when or how they would use it. The discussion ended without establishing plans to revisit the results.
Proficient	Based on their review of data during their instructional team meeting, a middle school math team determined that students needed more support on a unit from the curriculum. Two teachers shared specific strategies from their last meeting that they implemented, describing the aspects they found most and least effective. Their reflections led to a discussion in which the rest of the team committed to trying the most effective strategy in their classrooms. Additional strategies were proposed, with

Level	Scenario
	individual teachers explicitly stating which ones they would implement. The team agreed to revisit these steps at the next meeting and reserved time on the agenda to reflect on their effectiveness.

Appendix B: Team Meeting Observation Rubric

Lindsay Brown, Katrina Laguarda, Candice Bocala, Selin Capan, Paul Burkander

1. Date of meeting: _____
2. Start time: _____
3. End time: _____
4. Focus of meeting (e.g., grade level, subject area): _____
5. Number of meeting participants: _____
6. Professional roles of meeting participants: _____
7. Which of the following sources of data or evidence did the instructional team discuss in this meeting? (Choose all that apply.)

Data

a. Standardized tests (such as benchmark assessments or state assessments)
b. Other classroom assessments (such as curriculum-based assessments, chapter tests, unit tests, quizzes, exit tickets)
c. Student work samples (such as classwork or homework assignments, papers, science lab reports, math projects)
d. Instructional observation or walk-through data
e. Student demographic characteristics (such as gender, race, or socioeconomic status)
f. Student classification for receiving educational supports and services (such as special education or multilingual learner status)
g. Student grades or report cards
h. Student attendance
i. Discipline data or other student behavior data
j. Other data source: _____
k. None – the team did not review any sources of data

Evidence

l. Practice guides or intervention reports produced by the What Works Clearinghouse
m. Other research summaries or briefs
n. Books summarizing research findings
o. Articles published in peer-reviewed journals
p. Other: _____
q. None – the team did not review any sources of evidence

8. Please note any unusual circumstances that affected the meeting (e.g., interruptions): _____

Team Structures and Culture

Norms and Structures

Norms and Structures *captures the foundational practices that shape the team functioning, including routines and standard processes for how team members execute tasks. Clear norms and structures facilitate consistency and efficiency in team meetings.*

- ***Meeting Agendas*** *measures the preparation and adherence to structured meeting plans.*
- ***Meeting Roles*** *focuses on the group's ability to clearly assign roles and act in accordance with those roles in ways that guide the meeting toward achieving the objectives.*
- ***Protocols*** *assesses whether and to what extent protocols (e.g., structured discussion routines) exist and are applied to team processes.*
- ***Fidelity of Implementation*** *assesses how well team members understand and use specific concepts and terms related to the data inquiry model that their district or school is using, and/or to training they have received.*
- ***Time on Task*** *measures the efficiency and focus of team meetings.*

	Emerging	Developing	Proficient
Meeting Agendas	Meeting agenda is either absent or not adhered to.	Meeting agenda is present, but there are significant portions of the meeting that do not adhere to the agenda.	Meeting agenda is present and has clear objectives; the meeting focuses primarily or exclusively on agenda items.
Meeting Roles	Meeting roles are either absent or not clearly defined. As a result, meeting objectives may not be achieved, and/or discussions may deviate from the intended focus.	Some roles are assigned (e.g., facilitator or timekeeper), but they may not be consistently or effectively utilized. Their effectiveness in driving toward the meeting's objectives is inconsistent; some progress may be made, but key objectives may not be fully addressed.	Roles are clearly assigned and assumed, and they contribute to the progress of the meeting. Roles work together to maintain focus and advance the meeting's objectives.
Protocols	Protocols for team processes are either absent or unclear.	Protocols for team processes exist but may not be understood by all members or may not effectively contribute to meeting goals.	Protocols for team processes are generally followed; when necessary, they may be strategically adapted to ensure that meeting goals are reached.

Norms and Structures, continued			
	Emerging	**Developing**	**Proficient**
Fidelity of Implementation	Team members do not use terms or concepts relevant to the data inquiry model on which they have been trained or that their district or school has adopted. Alternatively, they attempt to use relevant data inquiry terms or concepts but do so inaccurately.	Team members use some terms and concepts relevant to their data inquiry model accurately, but there is evidence of some confusion or inconsistency in their application.	Team members consistently use terms relevant to their data inquiry model, including terms describing specific phases and steps in the inquiry cycle, correctly and effectively. Team members have a clear understanding of these terms and apply them accurately in the context of the discussion.
(*) Time on Task	Meeting time is not used efficiently because of late arriving members, unrelated housekeeping, or discussions that do not align with the purpose of the meeting.	Meeting time is generally on task, but some time is lost to off-topic discussions or delayed starts.	Meetings start and end on time, with minimal to no time spent on unrelated discussions.
Construct Score	**1 2**	**3 4 5**	**6 7**

(*) Indicator that could be weighted more heavily if necessary to determine a construct-level score on the scale of 1–7.

Collaborative Inquiry

Focus for Data Inquiry

*The construct of **Focus for Data Inquiry** encompasses the team's ability to collaboratively pinpoint and address a specific, education-related issue that is significant to their context. This involves identifying a focus for data inquiry that is actionable and grade-level appropriate.*

- ***Suitability** assesses whether the data inquiry focus is aligned with grade-level and content standards and takes students' prior learning into account.*
- ***Alignment of Meeting Activities** measures how well the activities in the observed team meeting address the data inquiry focus.*

	Emerging	Developing	Proficient
Suitability	The data inquiry focus is not clear, or it is not relevant or appropriate for the team's grade level or content focus, or it is not aligned with standards. The data inquiry focus does not address curricular objectives or build on students' prior knowledge and/or strengths.	The data inquiry focus is somewhat relevant, appropriate, or aligned with the team's grade level, content focus, and standards. The data inquiry focus may not fully address curricular objectives or build effectively on students' prior knowledge and/or strengths. Adjustments would be needed to ensure the focus is challenging yet attainable and actionable.	The data inquiry focus is fully relevant, appropriate for the team's grade level and content focus, and aligned with standards. The data inquiry focus effectively addresses curricular objectives and builds on students' prior knowledge and strengths. The focus is challenging yet attainable and actionable.
Alignment of Meeting Activities	Meeting activities are largely misaligned with the focus for data inquiry. There is minimal time devoted to relevant tasks, with significant portions of the meeting spent on unrelated activities or off-task discussions.	Meeting activities are somewhat aligned with the focus for data inquiry, although there may be occasional deviations. Although relevant tasks are addressed, the meeting may also include off-topic discussions or activities that do not directly contribute to the intended data inquiry focus.	Meeting activities are clearly and consistently aligned with the focus for data inquiry. The majority of the meeting is devoted to activities and discussions that contribute directly to the intended data inquiry focus. The team effectively uses the allotted time to achieve the meeting's objectives.
Construct Score	**1 2**	**3 4 5**	**6 7**

Data Use

Data Use *assesses how effectively teams use data or other forms of evidence to drive improvements and achieve educational outcomes. It encompasses the selection of appropriate data or evidence types, the depth of engagement with the data or evidence, and the subsequent formulation of actionable steps based on data or evidence insights.*

- ***Appropriateness*** *of data captures the suitability of the data types chosen by the team for addressing the data inquiry focus.*
- ***Data Engagement*** *measures the depth and quality of the team's data inquiry activities (discussion, review, or analysis).*
- ***Equity-Focused Data Use*** *assesses to what degree team members use data to identify and address inequities.*
- ***Accuracy of Data-Related Terms*** *assesses how well team members understand and use specific data-related vocabulary, such as statistical terms, data analysis concepts, and education metrics.*
- ***Substantiated Interpretations*** *evaluates the relevance of conclusions drawn from data within the context of the team's goals and analysis.*
- ***Collective Next Steps*** *assesses whether and how well the team translates data or evidence insights into practical, executable steps, which may include gathering additional data or restructuring data.*

	Emerging	Developing	Proficient
Appropriateness	There is no data or other form of evidence available to team members at the meeting, or the data is not suitable for the focus for data inquiry or meeting objective.	There is some data or evidence available to team members at the meeting. However, the data or evidence may not be consistently referenced or used throughout the discussion, and its connection to the educational task or question is only partially clear. Additional or alternative data or evidence sources would be more relevant or suitable for the data inquiry focus or meeting objective.	Relevant and suitable data or evidence from multiple sources is readily available to team members during the meeting. Team members refer to the data or evidence throughout their discussion, and the data is clearly appropriate for the data inquiry focus or meeting objective.
(*) Data Engagement	There are no data inquiry activities (discussion, review, analysis) of data sources or other forms of evidence.	Some data inquiry activities occur, but they are surface-level, focusing more on raw numbers than on understanding the underlying meaning, implications, or potential data limitations.	At least one data inquiry activity is substantive, with team members actively making meaning from the data or evidence, questioning the sources, considering data or evidence limitations, and/or exploring implications.

(*) Indicator that could be weighted more heavily if necessary to determine a construct-level score on the scale of 1–7.

Data Use, continued			
	Emerging	**Developing**	**Proficient**
Equity-Focused Data Use	Data inquiry activities (discussion, review, analyses) do not consider inequities affecting marginalized student groups; there is little to no discussion about how resource decisions might impact students differently, and disparities in student outcomes are neither identified nor addressed. Alternatively, conversations may reflect a deficit-based approach, in which disparities are viewed as deficiencies in students rather than as indicators of inequitable support or resources.	Equity is acknowledged, and some data inquiry activities highlight disparities or the needs of marginalized groups, but discussions remain surface-level. The team recognizes inequities but does not substantively engage in analyzing or using these insights to inform decisions or actions.	The team uses data to identify and address inequities affecting marginalized groups. Discussions are substantive and asset-based, focusing on how the team can improve support, resources, and systems to better serve all students.
Accuracy of Data-Related Terms	Team members do not use terms relevant to data analysis and interpretation of data or evidence, and/or use them inaccurately.	Team members use some terms relevant to data analysis or interpretation of data or evidence accurately, but there is evidence of confusion or inconsistency in their application.	Team members consistently use terms relevant to data analysis or interpretation of data or evidence, including technical terms, correctly and effectively. Team members have a clear understanding of these terms and apply them accurately in the context of the discussion.
Substantiated Interpretations	Interpretations and/or conclusions drawn from data or evidence are unsupported, inaccurate, or not relevant to the focus for data inquiry or meeting objectives.	Interpretations and/or conclusions drawn from data or evidence are generally accurate and at least partially supported by the data or evidence, but are not fully aligned with the data inquiry focus or meeting objectives.	Interpretations and/or conclusions drawn from data or evidence are accurate, fully supported by the data or evidence, and fully aligned with the data inquiry focus or meeting objectives.

Data Use, continued			
	Emerging	**Developing**	**Proficient**
Collective Next Steps	No next steps are discussed during the meeting, or next steps are unrelated to the team's review, discussion, or analysis of data.	Next steps for the team are discussed but only partly related to the team's review, discussion, or analysis of data. Next steps are not well defined; for example, it may be unclear who is responsible for the action, when it will be completed, or how it aligns to the team's goals.	Next steps for the team are firmly grounded in the team's review, discussion, or analysis of data. Next steps are clearly defined, actionable, and relevant to team goals. Actions are measurable and time-bound.
Construct Score	**1 2**	**3 4 5**	**6 7**

Constructive Dialogue

Constructive Dialogue *refers to how team members communicate with one another, particularly the interactions among team members that promote deeper understanding, critical analysis, and effective problem-solving.*

- ***Relational Trust*** *captures the level of comfort and security team members feel in openly expressing their views and the degree to which they believe they can rely on one another to engage respectfully and supportively during challenging conversations.*
- ***Idea Development*** *measures the extent to which team members utilize one another's contributions in the discussion, incorporating others' ideas into their own responses to build collective knowledge.*
- ***Transparency of Practice*** *focuses on the willingness of team members to share specific, candid insights about their own teaching or teaching that they have observed.*

	Emerging	Developing	Proficient
Relational Trust	Team members avoid conflict or disagreement; they change the subject when difficult topics arise or avoid answering probing questions. Alternatively, there may be signs of open hostility or tension.	Some team members ask probing questions and/or raise difficult topics. Although responses may involve mild defensiveness or hesitation, the group continues the dialogue. There are no signs of open hostility or tension.	Team members openly address and discuss difficult topics, including direct challenges to ideas and approaches, in a way that pushes collective thinking forward. If disagreement occurs, the group remains collaborative, and members show willingness to be open, honest, and receptive to feedback.
(*) Idea Development	Contributions are mostly isolated, with minimal effort to build on or develop others' contributions or ideas. Discussions are disjointed, and there is little evidence of progression toward deeper understanding, combining information into new insights, or collective knowledge.	Team members occasionally build on others' contributions or ideas but miss opportunities to do so. Discussions lack focus and do not consistently result in deeper understanding, combining information into new insights, or collective knowledge.	Team members consistently build on others' contributions in a way that deepens understanding, challenges ideas, and/or leads to combining information into new insights. Discussions are focused and advance toward deeper understanding or collective knowledge.

(*) Indicator that could be weighted more heavily if necessary to determine a construct-level score on the scale of 1–7.

Constructive Dialogue, continued			
	Emerging	**Developing**	**Proficient**
Transparency of Practice	Team members do not share specific details of instructional practices or interactions with students (either their own or practices they have observed). Discussions about practices tend to be vague, generic, or limited to surface-level challenges without meaningful reflection.	Team members may share specific examples of instructional practices or interactions with students (either their own or practices they have observed), but these disclosures are selective (limited to positive examples only) and do not support reflective analysis of teaching methods and outcomes.	One or more team members openly share detailed, specific examples of instructional practices or interactions with students (either their own or practices they have observed). The discussion focuses on reflective analysis of teaching methods and outcomes and aims to foster collective learning or improvement.
Construct Score	**1 2**	**3 4 5**	**6 7**

Team Member Investment

Active Contribution			
Active Contribution *assesses* ***individual*** *inputs to the team meeting, including the frequency and relevance of suggestions, questions, and feedback provided by a team member. Active Contribution evaluates how individuals influence aspects of team functioning.* ▫ ***Preparation*** *captures the readiness of team members for meetings.* ▫ ***Task Commitment*** *assesses the willingness of team members to take on responsibilities and follow through.*			
	Emerging	**Developing**	**Proficient**
Preparation	Most team members are unprepared for the meeting, impeding meeting progress. Agreed-upon follow-up actions from previous meetings may be incomplete or inadequately addressed. It is not clear that team members understand how the day's meeting builds on past decisions.	Team members are partially or unevenly prepared for the team meeting. Follow-up actions from previous meetings may be unevenly completed, and there may be inconsistencies in how well team members understand how the day's meeting builds on past decisions.	Nearly all group members arrive fully prepared for the meeting. Follow-up actions from previous meetings are completed on time, and team members demonstrate a clear understanding of how the meeting builds on past decisions.
Task Commitment	There is little to no volunteering for responsibilities; tasks may be left incomplete due to a lack of commitment. Alternatively, one team member may consistently volunteer for all tasks.	Some team members volunteer for tasks or roles, but volunteering is inconsistent across the team. Team members may sometimes require prompting from others before they offer to take on a task or role.	Members actively volunteer for tasks and roles, resulting in distribution of tasks among team members; responsibilities are readily accepted, and members are proactive in identifying areas where they can contribute.
Construct Score	**1 2**	**3 4 5**	**6 7**

Distributed Agency			
Distributed Agency *captures whether and to what extent leadership and decision-making responsibility are shared among team members.* ▫ ***Decision-Making Process*** *examines how team members come to decisions and how decisions are distributed.* ▫ ***Equitable Participation*** *assesses the distribution of speaking time across members.*			
	Emerging	**Developing**	**Proficient**
Decision-Making Process	The decision-making process is not clear, and most team members have little influence on the outcomes. Alternatively, the meeting may end without decisions being made.	The decision-making process is somewhat clear, and/or there may be imbalances in how much weight different members' input carries.	The decision-making process is clear, and all members have meaningful input. Perspectives are actively considered in reaching decisions.
Equitable Participation	One or two people dominate the conversation, limiting the opportunity for other members to contribute. The pattern of dialogue is unbalanced, with many voices not being heard.	Participation is spread out among multiple members, but some voices remain silent or contribute minimally.	All members consistently engage in discussions.
Construct Score	**1 2**	**3 4 5**	**6 7**

Application of Learning

Application of Learning *captures the extent to which individual team members apply insights from the team meeting to their classroom practice.*

- ***Instructional Application*** *evaluates how clearly and substantively the team builds on data and insights from the meeting to make decisions about the logical next steps for instructional strategies or classroom practices.*
- ***Accountability for Instructional Improvement captures the extent to which individual team members commit to making changes to their instruction or classroom practices, and/or the extent to which they have already made these changes.***

	Emerging	Developing	Proficient
Instructional Application	Little to no discussion occurs around how data insights or meeting discussions might influence or change classroom instruction or teaching practices. Instructional implications, if mentioned, are vague or superficial.	Team members discuss potential instructional implications of data insights or meeting discussions, but connections to specific classroom practices or strategies are general, are inconsistent, or lack sufficient detail to guide implementation.	Team members explicitly and substantively connect data insights and meeting discussions to specific instructional strategies or practices.
Accountability for Instructional Improvement	Team members do not commit to taking specific instructional steps or to making adjustments to their instruction, or only one team member does so and others do not reciprocate with their own commitments. OR Team members do not report back on specific instructional steps or adjustments they have taken.	Multiple team members describe instructional steps or adjustments they may implement, but the descriptions are vague or lack detail, and the extent of their commitment is not clear. OR Multiple team members report on instructional steps or adjustments they have taken, but their descriptions are vague or lack detail, and it is not clear what team members have learned from the experience.	Multiple team members articulate specific, actionable instructional steps or adjustments they plan to implement. These team members explicitly commit to the team their plans for taking these next steps. OR Multiple team members report on specific instructional steps or adjustments they have taken and reflect on their effectiveness or on what they have learned.
Construct Score	**1 2**	**3 4 5**	**6 7**

Appendix C: Team Meeting Exit Ticket

Lindsay Brown, Katrina Laguarda, Candice Bocala, Selin Capan, Paul Burkander

Thank you for participating in today's instructional team meeting. This exit ticket is anonymous and will take about 5 minutes to complete. Instructional leaders in your school or district will review the aggregated responses from your team to better understand how they can best support collaborative data inquiry in your school or district.

(1) (Q1) Date: _____

(2) (Q2) School Name: _____

(3) (Q3) Team Name: _____

(4) (Q4) In today's meeting, which of the following would best describe the phase of work your team was engaged in? (Select all that apply.)

- ☐ Getting organized or preparing for teamwork (Q4_1)
- ☐ Identifying a problem or a focus for data inquiry (Q4_2)
- ☐ Gathering evidence (Q4_3)
- ☐ Analyzing evidence (Q4_4)
- ☐ Developing an action plan (Q4_5)
- ☐ Implementing an action plan (Q4_6)
- ☐ Assessing an action plan and making adjustments (Q4_7)

(5) (Q5) How strongly do you agree or disagree with the following statements about the meeting that you participated in today? Consider just the meeting today.

	Strongly disagree (1)	Disagree (2)	Somewhat disagree (3)	Neither agree nor disagree (4)	Somewhat agree (5)	Agree (6)	Strongly agree (7)
The data we examined today gave me useful insights into my students' learnings and/or into my own instructional practices. (Q5_1)							

	Strongly disagree (1)	Disagree (2)	Somewhat disagree (3)	Neither agree nor disagree (4)	Somewhat agree (5)	Agree (6)	Strongly agree (7)
In today's meeting, our team had access to data that supported productive discussion about important instructional issues. (Q5_2)							
Our team has agreed on the next steps we will take based on our review, discussion, or analysis of data today. (Q5_3)							
I have a clear understanding of the next steps I will take after today's meeting. (Q5_4)							
I plan to make changes in my professional practice as a result of today's discussion. (Q5_5)							

(6) (Q6) How strongly do you agree or disagree with the following statements about your experience on your team? Consider not just today's meeting, but your entire experience on this team so far this school year.

	Strongly disagree (1)	Disagree (2)	Somewhat disagree (3)	Neither agree nor disagree (4)	Somewhat agree (5)	Agree (6)	Strongly agree (7)
In general, my team has chosen to focus on issues that are tied to student outcomes. (Q6_1)							
Our team generally does a good job aligning our work with grade-level and content standards. (Q6_2)							
I feel comfortable expressing my views in team meetings, even when the topic is challenging. (Q6_3)							

	Strongly disagree (1)	Disagree (2)	Somewhat disagree (3)	Neither agree nor disagree (4)	Somewhat agree (5)	Agree (6)	Strongly agree (7)
I have a voice in my team's decision-making process. (Q6_4)							
I feel that everyone on our team is working toward the same goal. (Q6_5)							
I learn things from the data and feedback shared during team meetings. (Q6_6)							
I learn things during team meetings that I would not have thought about on my own. (Q6_7)							
I have made changes to my professional practice as a result of the discussions I have had with this team. (Q6_8)							
I believe that as a group, this team is improving teaching and learning for students. (Q6_9)							

(7) (Q7) Is there anything else you would like to share about how today's meeting went?

Appendix D: Team Reflection Protocol

Adam Parrott-Sheffer, Carmen Williams, Candice Bocala

Purpose

The purpose of this protocol is to establish dedicated time for the collective sense-making of your Collaborative Data Inquiry (CDI) Practitioner Toolkit Data Dashboard. The Data Dashboard offers visual representations of the toolkit scores using explicit construct domains, indicators, and point values. However, it is important that teams discuss their interpretation of the visualizations and agree on a shared conclusion before determining next steps. Because the Data Dashboard offers only one evidence source, next steps should include the identification of questions and additional evidence sources to explore, and not an action plan for a problem to address. Your team reflection should end with a "data story," or a narrative about the work occurring on a team (or teams), what is working well, what the team(s) needs to learn next, and who might support them.

Goals

- Understand the data collection methods, the CDI Practitioner Toolkit domains of team functioning, the constructs that define collaborative data inquiry, and the indicators scored for analysis.
- Determine a data story that provides context and meaning for the toolkit data beyond the calculated scores.
- Collectively determine next steps, including questions and additional evidence to explore.

Facilitation Guidance

To make the most of the sense-making protocol, we recommend the following:

- Provide all participants with the populated Data Dashboard prior to engaging with this protocol. This allows participants additional time to understand the components of the Data Dashboard as well as how your school or district performed.
- While many people may have access to the Data Dashboard, we recommend breaking your debriefing sessions into groups of 4-6 participants. It is important to create space for all voices and consider many perspectives as you make sense of your data.
- The recommended times are based on a group of 4-6 participants with a 45-60 minute meeting window. You are encouraged to reduce or extend the time based on the size of your group or other priorities.
- When possible, return to the *why*, or common purpose, of your shared work and how the activities within the protocol may contribute.
- Chart, record, or take notes on discussions and decision-making to support next steps.
- The prompts in the Team Reflection Protocol can be edited for depth or emphasis, but we encourage you to answer all prompts in the order provided.

Evidence Guidance

The following are examples of teams that might make use of this Team Reflection Protocol:

- *Grade-level/subject-area team*: This team might examine evidence from at least 3–4 meetings to understand their strengths and areas for growth.
- *Instructional leadership team*: This team might examine evidence from at least 3–4 teams to better understand how teams across the school are collaborating.
- *District leadership team*: This team might examine evidence from at least 3–4 schools to understand patterns and trends in teacher collaboration across the district.

All teams should remember that this protocol is one data source based on a few short observations. Before claims are made about what a team needs to improve or what supports they need, team members should discuss which additional evidence sources they could review (such as meeting agendas, meeting notes, interviews with individual team members). This inquiry should lead to more questions and the examination of evidence closer to the work of the team.

Team Reflection Steps

(1) **5 minutes**: Gathering

   a. Provide a welcome, check-in, and/or purpose statement.

(2) **Pre-meeting or 10 minutes**: All team members silently review the school or district CDI Practitioner Toolkit Data Dashboard. Ensure everyone is familiar with the toolkit

measures. Consider the following language if asking team members to complete as pre-meeting work:

> *The attached Excel worksheets are recent reports summarizing practices in our data meetings. The **Meeting Observation** charts in blue are a summary of multiple observations of team data meetings, and the **Exit Ticket** charts in yellow are a summary of participant responses. Before we meet on <insert date and time>, please spend 15–20 minutes reviewing the data independently. Annotate the reports with what you notice (without editorializing) and things you are wondering about. You should consider each sheet on its own as well as the similarities and differences between the different charts. To the extent possible, focus your analysis on what the charts tell you (and don't tell you) about data meeting practices and not about the dashboard itself.*

(3) **20 minutes**: Notice and Wonder Activity

a. Each team member will select 2–3 low-inference statements about what they noticed ("noticings") and 2–3 questions of what they wondered ("wonderings") from their review of the **Meeting Observation** score data charts. One team member will start by sharing one noticing from the data. Other team members will then raise their hand if they had a similar noticing. The recorder will note the noticing and the count of people who shared it. A different individual will share their noticing, and other team members will raise their hand if they have that one. Repeat the process until all noticings are shared, and then begin again with wonderings.

b. Each team member will contribute 2–3 noticings and 2–3 wonderings when reviewing the **Exit Ticket** score data charts. Remind team members not to repeat what was already stated. Use the same sharing process described for the **Meeting Observation** analysis above.

c. Discuss the themes across the two data sources. Consider what is consistent, surprising, and/or a curiosity. Record the big ideas on chart paper or the agenda.

    i. Discuss what questions are emerging and what additional evidence you might need to gather to address those questions.

(4) **15 minutes**: Develop Your Data Story

a. For the purposes of this discussion, a "data story" is a narrative that uses the evidence to describe the work of a team (or teams), what is working well, what the team(s) needs to learn next, and who might support them.

b. Brainstorm the elements of your data story using evidence from your summary report. Consider including the following in the story:

- Which team(s) is represented? For example: Is the data about teachers from a certain grade or department? School leaders?
- What are the assets or strengths of these teams related to collaborative data inquiry? How do we know?
- What are the learning gaps or challenges (e.g., related to knowledge, skills, or beliefs) related to collaborative data inquiry? How do we know?
- Who is responsible for supporting the team(s) to improve their collaborative data inquiry work? For example, school leaders, coaches, or district leaders might provide support for the team(s). What resources (e.g., time, people, materials) do they need in order to provide better support for the team(s)?
- What is the next step for the team(s)? What is the next step for those who support the team(s)?
- What would it look like for the team(s) if we successfully close learning gaps? Describe what it will look like and sound like in a data meeting, using the language of the CDI Practitioner Toolkit.

(5) Draft a brief narrative telling a Collaborative Data Inquiry team story that your team agrees with. You may describe your current reality, possible next steps or actions, and a conclusion that shows your ideal end state. Use descriptive language to illustrate your values and the emotions involved in the work. Be explicit about the people who are necessary for success (use names where possible). Consider who else in your organization needs to hear your story, how you will tell them the story, and how they will draw conclusions from the data about their next steps. If time permits, or during another session, you can go further to prepare a story for a broader audience.

(6) **5 minutes**: Closing

a. Express gratitude and determine next steps for continuing your practice, collecting more data, or identifying new action.

Team Reflection Protocol Template

Step 1: Examine the CDI evidence and capture low-inference observations ("noticings") and questions ("wonderings") you have about the team's collaboration. Gather as many as you can find and then highlight the 2–3 ideas in each column that you think are most significant or helpful.

Noticings	Wonderings
•	•
•	•
•	•
•	•
•	•
•	•

Step 2: After everyone has shared and grouped their noticings, capture the themes and groupings below.

Themes and groupings	What additional evidence might you gather and how will you gather it?
•	
•	
•	
•	
•	
•	

Step 3: Discuss the following prompts and take notes.

(1) Which team(s) is represented? For example: Is the data about teachers from a certain grade or department? School leaders?

(2) What are the assets or strengths of these teams related to collaborative data inquiry? How do we know?

Step 3: Discuss the following prompts and take notes.

(3) What are the learning gaps or challenges (e.g., related to knowledge, skills, or beliefs) related to collaborative data inquiry? How do we know?

(4) Who is responsible for supporting the team(s) to improve their collaborative data inquiry work? For example, school leaders, coaches, or district leaders might provide support for the team(s). What resources (e.g., time, people, materials) do they need in order to provide better support for the team(s)?

(5) What is the next step for the team(s)? What is the next step for those who support the team(s)?

(6) What would it look like for the team(s) if we successfully close learning gaps? Describe what it will look like and sound like in a data meeting, using the language of the CDI Practitioner Toolkit.

Step 4: Summarize your story below in 2–3 sentences and decide who you will share your story with, how you will share it, and when you will share it.

Appendix E: Team Member End-of-Year Survey

Lindsay Brown, Katrina Laguarda, Candice Bocala, Selin Capan, Paul Burkander

Team Information

Please take a moment to note which team this response relates to.

- School Name: _____
- Team Name: _____

Instructional Team Meetings Focused on Using Data

In the questions below, please focus on your experience collaborating with your instructional team to use data to improve student outcomes **during this school year**. Collaboration focused on using data may happen during grade-level team meetings, subject area team meetings, professional learning community (PLC) meetings, school data days, or other times reserved for instructional teams to work with data.

(1) How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year? (Select one in each row.)

	Hardly any meetings	Occasional meetings	Half of the meetings	Most meetings	Almost all meetings
I was clear on our meeting objectives at the start of the meeting.					
We had enough time to meet our objectives.					
Most team members arrived well-prepared.					
Meeting with the team was a good use of my time.					
Our objectives were important for us to discuss together.					
We should have discussed more important topics instead of what we talked about.					

(2) How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year? (Select one in each row.)

	Hardly any meetings	Occasional meetings	Half of the meetings	Most meetings	Almost all meetings
I was fully engaged in the discussions.					
Our meetings had clear expectations or norms.					
Everyone in the meetings contributed to meeting our objectives.					
Our discussions helped us develop a shared understanding of what we need to do as a team.					
When we disagreed, we did so respectfully.					

(3) How did you feel about collaborating with your instructional team on using data to improve student outcomes during this school year? (Select one in each row.)

	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
My relationships with my team members are open and honest.						
We have a great deal of cooperative effort among staff members.						
We provide strong social support for one another.						
We respect one another's professional competence.						

(4) How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year? (Select one in each row.)

	Hardly any meetings	Occasional meetings	Half of the meetings	Most meetings	Almost all meetings
I left the meeting knowing what my next steps were.					
I did something different in my classroom because of our meeting.					
I left the meeting without learning something new.					
I left feeling frustrated with our lack of progress.					
We made more progress during our meeting than I would have on my own.					

Working with Data

The questions below ask you specifically about the work your team did with data **during this school year**. The word "data" has a wide definition, including but not limited to standardized tests, benchmark assessments, student work, exit slips, class and peer observations, disaggregated student data and interviews, and demographic data.

(5) How often were the following statements true of your instructional team meetings focused on using data to improve student outcomes during this school year? (Select one in each row.)

	Hardly any meetings	Occasional meetings	Half of the meetings	Most meetings	Almost all meetings
We reviewed data to help us achieve our objectives.					
The data we discussed gave me useful insights into **my teaching practice**.					
The data we discussed gave me useful insights into **my students' learning needs**.					
I understood what the data we discussed measured.					

	Hardly any meetings	Occasional meetings	Half of the meetings	Most meetings	Almost all meetings
We made factual observations about the data before we interpreted the data.					
We reviewed disaggregated data of different student subgroups (for example, English learners).					
We thoroughly understood the data we reviewed before discussing what actions to take.					
I did not understand the connection between the data we discussed and our meeting objectives.					
We used data to better understand the strengths and assets of our students.					
We discussed the biases we may have with interpreting data.					

Thank you for completing this survey!

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