Collaborative Data Inquiry Practitioner Toolkit: Instructional Team Meeting Observation Rubric

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Authors:
Lindsay Brown, New York University
Kate Laguarda, SRI
Selin Capan, SRI
Candice Bocala, Harvard Graduate School of Education
Paul Burkander, SRI

Instructions:
The Collaborative Data Inquiry (CDI) Practitioner Toolkit's Instructional Team Meeting Observation Rubric is designed to be used by an external observer to record team processes as they occur in a single meeting. The external observer could be an instructional coach, a team leader, another instructional leader at the school or district level, a researcher, or a CDI model coach.

The rubric is organized by domains (blue section headings), constructs (table headers), and indicators (row titles). For each indicator, the Observation Rubric includes descriptions of practice at three levels (Emerging, Developing, and Proficient). Observers assign scores of Emerging, Developing, and Proficient at the indicator level first and then aggregate those scores to the construct level from 1 to 7. Additional guidance on conducting observations is available in the CDI Practitioner Toolkit's User Guide.

Instructional Team Meeting Observation Rubric

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.

- o   *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.
- o   *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

SRI

Silicon Valley
(SRI headquarters)
333 Ravenswood Avenue
Menlo Park, CA 94025
1.650.859.2000

Washington, DC
1100 Wilson Boulevard
Suite 2700
Arlington, VA 22209
1.703.524.2053

education@sri.com

www.sri.com/education-learning/