**Quarterly Data Meeting Protocol Steps**

**Before the Meeting**

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

1. **Determine the Objective.** For example, what does the group want to know? What evaluation questions does the group want to answer at this time?
2. **Identify the Data.** For example, what information (data) is available to address the evaluation questions that would be useful for a group discussion?
3. **Identify Participants and Key Responsibilities.** Identify key decisionmakers and relevant stakeholder perspectives to include in the meeting, such as other state staff, local/regional staff, practitioners, policymakers, and community members, as appropriate. Determine who will serve in the key roles of meeting facilitator, timekeeper, and notetaker. The protocol lead may also serve as the meeting facilitator, or may assign another individual as facilitator, while the protocol lead serves a different role.
4. **Organize the Data to Present.** Aggregate/disaggregate the data as appropriate. This may involve turning raw data into accessible formats, for example, transcribing individual interviews into transcripts, documenting meeting agendas, entering survey responses into a spreadsheet, summarizing quantitative data by using descriptive statistics (e.g., tabulations, averages, ranges) and simple data visuals (e.g., bar graphs, pie charts, infographics).
5. **Prepare and Distribute the Agenda.** Include the evaluation question or questions the group will address. Consider providing organized data in advance to give group members the opportunity to explore and think about the data prior to the meeting. Determine what information to share in advance to provide the necessary context. You also may want to create a process agenda for use by the protocol lead or facilitator that includes discussion prompts and other helpful suggestions.

**During the Meeting**

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

1. **Introductions and Key Messages.** Review the meeting’s purpose, objectives, intended scope, and agenda. Announce key meeting roles (e.g., notetaker, timekeeper). Situate the conversation within the broader evaluation/continuous improvement process, such as exploring data to gain meaningful insight in order to understand progress and improve your program. Identify the evaluation questions that the group will address by the data analysis activity (e.g., at the end of this conversation, we want to be able to better understand “X” or say “Y”). Allow participants an opportunity to express assumptions or predictions they may have about what the data may reveal. Preview the steps of the upcoming discussion: observations, interpretations, implications, and next steps.
2. **Present the Data.** Display the data in a way that the group can aggregate and disaggregate as needed. For example, this may mean that the facilitator has the chart to present the aggregated data but also can access the supporting Excel spreadsheet to show to the group and discuss.
3. **Discuss Observations of the Data.** Use guiding questions to help the group observe the data.
   * What do you see?
   * What are your initial thoughts or reactions?
   * Is this what you expected to see? If so, how? If not, how?
   * What surprises you?
   * Are there particular data that catch your attention? (e.g., a certain survey question, student score)
   * What do these data not provide? What are the limitations of these data?
4. **Discuss Interpretations of the Data.** Prompt participants to interpret the data in light of the evaluation questions. Have participants consider their own perspectives that they bring to the data.
   * What does it tell you?
   * What answers are you getting for our original evaluation questions from the data?
   * What thoughts or assumptions do these data confirm?
   * Are there any limitations to our conclusions?
   * Are there any perspectives we haven’t considered?
   * Do we need additional data to answer our questions? What additional data might inform this? Are we currently collecting these data OR do we need to collect new data?
5. **Discuss Implications of the Data.** Prompt discussion of implications for the work.
   * What are the implications?
   * So What? Why does this matter?
   * What does it mean for the work?
   * Based on what you see, is there support to maintain our current course of action or should we do something different? Why?
6. **Determine Next Steps for the Group.** Based on group interpretations and suggested implications, discuss additional actions that are required.
   * Are there specific actions, such as changes, additions, or eliminations of programs or activities, that should occur?
     + If yes, then outline a specific plan to execute, including who is responsible, the timeline, etc.
   * Does this topic warrant additional discussion/check-ins?
     + If yes, what is the timeline (e.g., weekly, bi-weekly, monthly, quarterly)?
   * If action is required, when and how should the group be notified that this has occurred (e.g., at the next meeting, via email)?
7. **Reflect on the Meeting’s Effectiveness.**
   * What went well in this meeting?
   * What could we improve for next time?

**After the Meeting**

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

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