
TIP SHEET: COMPONENTS OF A DATA REVIEW PROTOCOL

Once you have collected and prepared data about your program, you will likely want to bring people who care about your program together to review and make sense of that data. An effective data review session – whether it is conducted in person or virtually – has several core components. Creating a protocol (or plan) that incorporates these components can help ensure success. Core components and ideas for implementing them are listed below.

COMPONENT #1: MEETING PEOPLE WHERE THEY ARE

Before jumping into the data, it is important to acknowledge that people enter a data review with a range of backgrounds and perspectives. Prompting people to reflect on their biases, beliefs, and feelings at the outset sets the stage for a more meaningful and equitable data review. Prompts to invite reflection include:

- *What word or phrase comes to mind when you think about data and evaluation?* You can also represent emotions visually, through emojis or pictures, and have people select an image they identify with. This can help to alleviate some of the anxiety that people feel around these topics.
- *We are going to look at data about _____. What predictions do you have about this data? Think about what you would need to see to either confirm or refute this prediction.* Confirmation bias is inevitable, but it can be helpful to get people thinking about and challenging their biases in advance.

COMPONENT #2: CREATING SHARED UNDERSTANDING

Just as people enter a data review with diverse perspectives, they may also enter with a range of expertise around data. Spending time building a shared understanding of the data you are reviewing can mitigate some of the power dynamics that might arise from differences in expertise. Plan to dedicate some time to walking through data and inviting clarifying (not interpretive!) questions.

COMPONENT #3: ACTIVATING THE WISDOM OF THE GROUP

The process of interpreting data is at the heart of a data review session. By allowing people to bring their perspectives to the data you have shared, you can build understanding around your work and enhance the value and meaning of your evaluation. Some ideas for engaging people in the interpretation of program data include:

- Facilitate small group discussion with structured questions. This works well in person and in virtual settings. Participants can share reactions and ideas with one another and share back to the larger group. Questions that lead to good discussions tend to be:
 - Strengths-based. Focus on identifying what is working well so that you will have something to build upon.
 - Open-ended and open-minded. Avoid leading questions and questions designed to elicit a specific response.
 - Designed to foster connections. Asking people what resonates with them can help them to connect to the data and to each other.
- Conduct a gallery walk. Post data samples around a room and have people circulate in pairs or small groups to discuss and post their thoughts on sticky notes. Then do a second round allowing participants to respond to the thoughts of others.
- Help participants to focus on root causes. Sometimes this exercise is referred to as “five whys” because it begins with the observation of a fact or data point, then continues to pose the question “why?” until a root cause is discovered. This kind of exercise can be a key equity strategy because it can help to trace individual or group results to structural or systemic causes.

COMPONENT #4: IDENTIFYING NEXT STEPS

Data rarely provides definitive answers to the questions that people have about programs or initiatives. However, data can often generate insights that lead to plans for next steps. Sometimes these will be **action** steps (things your program will do) and sometimes they will be **inquiry** steps (further analysis of existing data or collection of new data). These steps can be identified by asking people to:

- Answer the following questions: *What should this program keep doing, or do more of? What can this program consider letting go?*
- Choose one data point that is important to improve, and suggest a targeted strategy to improve it.
- Set one to three programmatic goals related to the data.
- Generate a list of questions that arose based on the data. Then choose the ones that are most important to answer in the near term.