DATA OBSERVATION PROTOCOL

This protocol is designed to support teams in describing, analyzing, and building a shared understanding of data. Equal turn-taking and guiding questions are utilized to help teams move systematically through a data set and avoid premature interpretation. This tool may be used in isolation or as part of a deeper root cause analysis investigation.

Participants

Roles: Facilitator, Notetaker, Timekeeper

Group Size: 3-7 people

Time: 45 minutes

Materials

In Person:
- Shared notetaking: large poster paper and markers
- Individual notetaking: sticky notes or paper and pen or pencils.

Virtual: Share notetaking materials and screen sharing

Instructions For Use

1. Private think time: 5-7 minutes to review the data individually.

2. Group go-rounds: Facilitator asks participants the guiding questions one at a time and asks each participant to share their response. Notetaker records all responses.

   Guiding Questions
   - What do you see/notice?
   - What does the data indicate are areas of strength?
   - What does the data indicate are areas of need?
   - How has performance changed over time?
   - What patterns do you notice?
   - Are there any outliers in the data that may need further investigation?
   - What questions do you have?
   - What additional information is needed to better understand the problem?

3. Closing: open discussion
   - Looking at the responses, what are the big takeaways?
   - What did we learn?
   - What are our next steps?
   - Calendar any follow-up items.