



# 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

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**Roles:** Facilitator, notetaker, timekeeper

**Group Size:** Group of approximately 3-7 people

## Materials

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**Note-taking materials for participants:** Sticky notes or paper and pen or pencils.

**Shared note-taking space:**

- In-person: large poster paper and markers
- Virtual: virtual doc to utilize via shared screen

## Data Observation Steps

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1. **Private think time:** Take 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.