

Before you open the data

For a team about to start an evaluation, an improvement cycle, or a renewal decision. Plan on one meeting, and hold it before anyone has looked at the numbers.

1 Name the decision this work has to inform.

Who makes it, and when? If no decision is waiting on this work, write that down too.

THE DECISION

WHO DECIDES

BY WHEN

2 What matters most to know right now?

Write the one question the team most needs answered before that decision. If you have several, keep the one whose answer would change the decision.

3 What do we need to keep learning over time?

List the measures you will repeat, collected the same way each time. Note when you will record the baseline, before anything changes.

MEASURES WE WILL REPEAT

BASELINE RECORDED BY

4 Which data are requirement-driven rather than value-driven?

List what you already collect or report. Mark why you collect it, and whether it helps answer the question in step 2.

THE DATA

REQUIRED, OR OUR CHOICE

HELPS ANSWER OUR QUESTION?

For each required measure that doesn't help, name one thing you could show next to it.

5 Agree what you will do with the answer.

Before anyone opens the data, write what the team will do if the answer points one way, and what it will do if it points the other. Then name who looks first and when the team meets again.

IF THE ANSWER IS YES, WE WILL

IF THE ANSWER IS NO, WE WILL

WHO LOOKS FIRST

WHEN WE MEET AGAIN

If you want support planning before your team opens the data, I would love to hear about it.



What the research says

The research behind this meeting guide. Links to every source are at swerdlowpartners.com/before-you-open-the-data.

Start with the decision the work has to inform.

Patton defines utilization-focused evaluation as “evaluation for intended use by intended users.” Naming the decision, who makes it, and when tells the team who will use the work and for what.

Patton, M. Q. Utilization-Focused Evaluation, utilization-focusedevaluation.org.

A clear question comes before the data.

A RAND synthesis of its studies of data use in schools notes that some describe educators as “drowning” in data, and recommends training on how to formulate questions before working with results. Coburn and Turner’s review of research on data use opens with the lesson that data “are only as good as how they are used.”

Marsh, J. A., Pane, J. F., & Hamilton, L. S. (2006). *Making sense of data-driven decision making in education: Evidence from recent RAND research*. RAND Corporation.

Coburn, C. E., & Turner, E. O. (2011). Research on data use: A framework and analysis. *Measurement: Interdisciplinary Research and Perspectives*, 9(4), 173–206.

Measurement for improvement starts with a baseline.

Solberg, Mosser, and McDonald separate measurement for improvement from measurement for accountability and for research. Measurement for improvement includes establishing a baseline and checking newly changed processes, which is why the sheet asks for the baseline before anything changes.

Solberg, L. I., Mosser, G., & McDonald, S. (1997). The three faces of performance measurement: Improvement, accountability, and research. *Joint Commission Journal on Quality Improvement*, 23(3), 135–147.

Required data often can’t answer improvement questions.

Solberg and colleagues write that data for accountability “do not usually illuminate how the outcomes were achieved or how processes might be changed to improve them.” In the RAND studies, state test results generally arrived too late to adjust the current school year, and more than 80 percent of superintendents found local assessments more useful for decisions than state tests.

Solberg, Mosser, & McDonald (1997), and Marsh, Pane, & Hamilton (2006), above.

Deciding in advance protects against hindsight.

Nosek and colleagues argue for defining the question and analysis plan before seeing results, a practice called preregistration, because ordinary biases such as hindsight bias make it hard to judge results fairly afterward. Step 5 adapts that practice to a team meeting.

Nosek, B. A., Ebersole, C. R., DeHaven, A. C., & Mellor, D. T. (2018). The preregistration revolution. *Proceedings of the National Academy of Sciences*, 115(11), 2600–2606. doi.org/10.1073/pnas.1708274114

If you want support planning before your team opens the data, I would love to hear about it.

