

## Data for Equity Conversation Protocol<sup>1</sup>

Discussion protocols can be powerful tools to shift the norms of professional discourse, enable equity of voice in a conversation, and move a conversation through stages (e.g., from ideas to actions) (Little & Curry, 2009; McDonald et al., 2003). This data discussion protocol is structured around the idea of the “Ladder of Inference” – the mental process that people progress through as they encounter new information (Chris Argyris, referenced in Senge, 1990). The protocol takes the participants from understanding to noticing, noticing to hypothesizing and raising questions, and then to next steps. These explicit steps through the ladder of inference promotes a conversation about the hypotheses and mental models that participants are drawing upon to make their interpretations—rather than participants assuming that everyone sees and interprets the data as they do. The protocol prompts participants to consider other ways of seeing the data and alternative interpretations. Equity concerns are forefront in this protocol through the framing and norms, the prompting questions, and the “equity pause,” which compels participants to reflect on their own conversation and identify assumptions that might be made.

### Activity Instructions

Suggested time for the discussion, not counting the “Phase 0” pre-meeting preparation: 30–60 minutes.<sup>2</sup> The suggested times for the data conversation itself (Phases 1-4) assume a 45-minute discussion.

## Phase 0: Pre-Meeting Work and Facilitator Considerations

### Questions to ask before engaging in this protocol

- *What data do we need to look at? How might we bring in “Opportunity to Learn” data, or qualitative data from empathy strategies, to increase attention on the system and to humanize the data? Who decides what to look at?*
- *How can we display the data to illuminate and understand disparate experiences and outcomes?*
- *What is the purpose of looking at this data? (For example, to identify inequities, understand problems and their causes, check progress, identify bright spots, etc.) Consider modifying the purpose listed on the next page with your additions or alterations.*
- *What questions are we trying to answer?*

<sup>1</sup> This protocol draws primarily on the High Tech High Graduate School of Education [Data Equity Protocol](#), and also draws on elements from the [CASEL SEL Data Reflection Protocol](#). We are grateful to these organization for their generosity in sharing their materials for public use. This protocol has been modified and refined by the WestEd Improvement Science team through use with education partners. It is an evolving document, and we invite you to adapt it for your own context and purpose.

<sup>2</sup> The length of this activity will depend on the number of data visualizations that are being examined, the number of participants, and the nature of the conversation. Typical data conversations can last somewhere between 30 to 60 minutes.

- *Whose perspectives are represented? Whose perspectives are missing? Who needs to be in the room to ensure multiple perspectives are considered and movement is made?*
- *What is missing from this data? What other data or whose perspectives might further our understanding of the issue?*

### Considerations for Discussion Structures and Processes

1. You can use this protocol with a single group or multiple small groups. Consider the number of people in a group to enable everyone to share ideas.
2. Within the group dynamics, are there issues of power, authority, or positionality (e.g., race, gender, age, institutional hierarchy, etc.) that might affect participation?
  - a. Who is participating? Who is missing? How can we bring in the voices of important community members into this or subsequent meetings?
  - b. What supports do you need to put into place to have a healthy, productive, and brave conversation that will achieve the purpose described above? For example, consider the strategy of having participants write reflections before sharing to make space for different modes of processing.
3. Tailor and order discussion questions to suit the data at hand and the conversation you are hoping to promote.

## Phase 1: Meeting Framing and Norm-setting (10 minutes)

### Equity Definition

[Enter your organization's equity definition here. Below is a sample definition:]

**Sample Equity Definition** adapted from the [National Equity Project](#) and [Achieving the Dream](#).

Each person receives what they need, when they need it, to thrive socially, emotionally, and professionally through the intentional design of workplace experiences and interacting systems.

Clarify the purpose of this session:

- To identify equity **gaps in our system**, **reflect on the conditions** that create and perpetuate them, and move forward with **concrete steps** for understanding and interrupting inequities.

Framing the way we look at data:

- Embrace the equity definition
- Center thinking on the system: for whom is the system benefitting and harming?
- Acknowledge the complexity of the human experience: the danger of a single story.
- Recognize the shortcomings of data, without dismissing altogether: any given data source is only a piece of the puzzle but can spark curiosity and focus attention about where to look next.

Discussion Process Norms: Conversations about data and equity can elicit a range of emotions. As a result, these conversations can raise feelings of vulnerability. This is not a bad thing. A structured protocol helps maintain focus and constructive dialogue, and when executed thoughtfully, invites participants to engage fully.

- **Share the air...** Take space, make space, invite others in.
- **Lean into discomfort...** We can't improve what we do not face.
- **Embrace "we," not "they" ...** to unpack how our systems can perpetuate and interrupt inequity.
- **Own your intent and impact...** Resist defensiveness/blaming/avoidance and seek to understand.
- **Stick to the protocol...** It helps people be in their brave space and move forward.
- **Stay engaged...** Avoid distractions, close your email, set up a context in which you can focus.
- **Accept and expect non-closure...** When we tackle the deep-rooted inequities in our system, we are not going to resolve issues overnight.
- **Every data point has a heartbeat...** There are people and differing perspectives behind the numbers.

## Phase 2: Reviewing the Data (20 minutes)

### Step 0: Discussion facilitator orients team to data

1. Orient and describe how the data was collected and displayed.
  - a. Contextual framing, e.g., what the data focus on and why are looking at them
  - b. Data Collection/ Method: Timing, sample, survey tool, etc.
  - c. Who is included/not included?
  - d. Describe Data: title of visualization, x-y axis, units
2. Give the group the opportunity to ask clarifying questions about the data before moving to Step 1.

Sentence Frames and Examples:

- *These data include 2021 math test scores for all 4th graders at ABC Elementary...*
- *The data come from a survey mailed to parents...*
- *On the x-axis you see... and on the y-axis you see...*
- *The green bar shows...*

### **Step 1: Low Inference Description / Observation**

1. Make sure that each person on the team understands the data display. Ask:
  - a. *What do you notice? State a fact from the data, not an interpretation or an inference.*
  - b. *What jumps out at you from the data?*
2. Provide the group 2 minutes to review the data in silence (longer if more displays).
3. Each member should share one thing they notice.

Sentence Frames and Examples:

- *I observe that...*
- *Some patterns/trends I notice...*
- *I'm surprised to see...*

Note: Avoid words like 'because' and 'therefore'

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## Step 2: Hypothesize and Raise Questions

- *What do these data suggest about who the system is benefitting and who it is harming (e.g., race, gender, disability status, grade level, economic status, etc.)?*
- *What root causes might account for what we see in the data (i.e., system failures, not personal characteristics)? What alternative explanations exist about our systems/processes?*
- *What additional data do we need to understand the problem more fully or (dis)confirm causes?*

### Sentence Frames and Examples:

- *I believe the data suggests... because...*
- *Additional data that is needed to inform/confirm/verify is...*
- *Possible root causes behind these findings may be...*

Note: To avoid a tendency to place blame on people and turn to deficit mindsets, return to the norms and remind the group that we are looking at data to understand the systemic nature of the problem.

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### EQUITY PAUSE

Take a moment to consider: How might we be making assumptions, engaging in deficit thinking, or blaming others rather than taking a critical eye to our system and our own practices and policies? Bravely focusing on the system and our own contributions helps us identify what is in our locus of control/influence and where we can target our improvement efforts.

## Step 3: Next Steps

- *Given the root causes we discussed, where should we focus our attention?*
- *What changes, strategies, and interventions can you test to see if you can address key concerns that were raised in this conversation? Who do these changes serve?*
- *How can we learn more about inequity from those most marginalized or underserved by the system?*

- *What can you do to answer key questions that were raised in this conversation? Who can you talk to or what additional data or analyses might be insightful?*
- *When should this team meet again?*

Sentence Frames and Examples:

- *We should focus our attention on...*
- *An area to further investigate is...*
- *Some people we should talk to are...*
- *I think an equitable action to begin addressing the issue is...*
- *To advance equity in our system, a process that we need to modify or redesign is...*

### Phase 3: Group Alignment on Next Steps (8 minutes)

<p>How can you learn more? (Consider various sources: Data, interviews, etc.)</p> <p>OR</p> <p>What might be intentional next steps to work to disrupt the status quo?</p>	<p>Who is responsible for taking this action?</p>

### Phase 4: Reflect on Content & Process (7 minutes)

The facilitator leads the group in reflecting on this *process*. Resist the urge to return the conversation to the data. Aim to share both “warm” and “cool” feedback—it can be just as helpful to know what to keep as to know what to change.

Helpful Guiding Questions:

- *What are some appreciations, acknowledgements, and aha’s from today’s session?*
- *What was this process like for you?*
- *What steps were helpful? What helped to keep the conversation focused on equity?*
- *What adjustments would you make and why?*

<b>Participant Name</b>	<b>What feedback (warm and cool) do you have about the data session, protocol and facilitation that would be supportive for our work internally and with external partners?</b>

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