



PROVE. Elevating Data. Advancing Research. Improving Evaluation.



Improving your Team's Use of Data,
Evidence, and Action Planning

Robert Dais and Rob Wessman

Housekeeping



- Locate your organization's guiding document. For example:
 - Copy of grant
 - Strategic plan
 - Annual plan
- Locate a data source you can access today. For example:
 - APR
 - Survey results
 - Aggregate test data

Elbow bump introductions



1-2-3 Getting to Know You



- (1 min) Stand up if a particular description applies to you
- (2 min) Go around your table and introduce yourself, your position, and something you like to do outside work
- (3 min) Find a partner at your table and describe briefly what you hope to get from this session today and how you will make best use of the time. Switch at 90 seconds.

Introducing your facilitators



- Robert Dais – GEAR UP
Massachusetts
- Rob Wessman – Koru
Strategy Group

Setting our norms



- Take an inquiry stance
- Ground statements in evidence
- Assume positive intention
- Play along with activities and hear all voices
- Start and end on time
- Be here now
- Approach the day with openness and curiosity

Let's collect some data



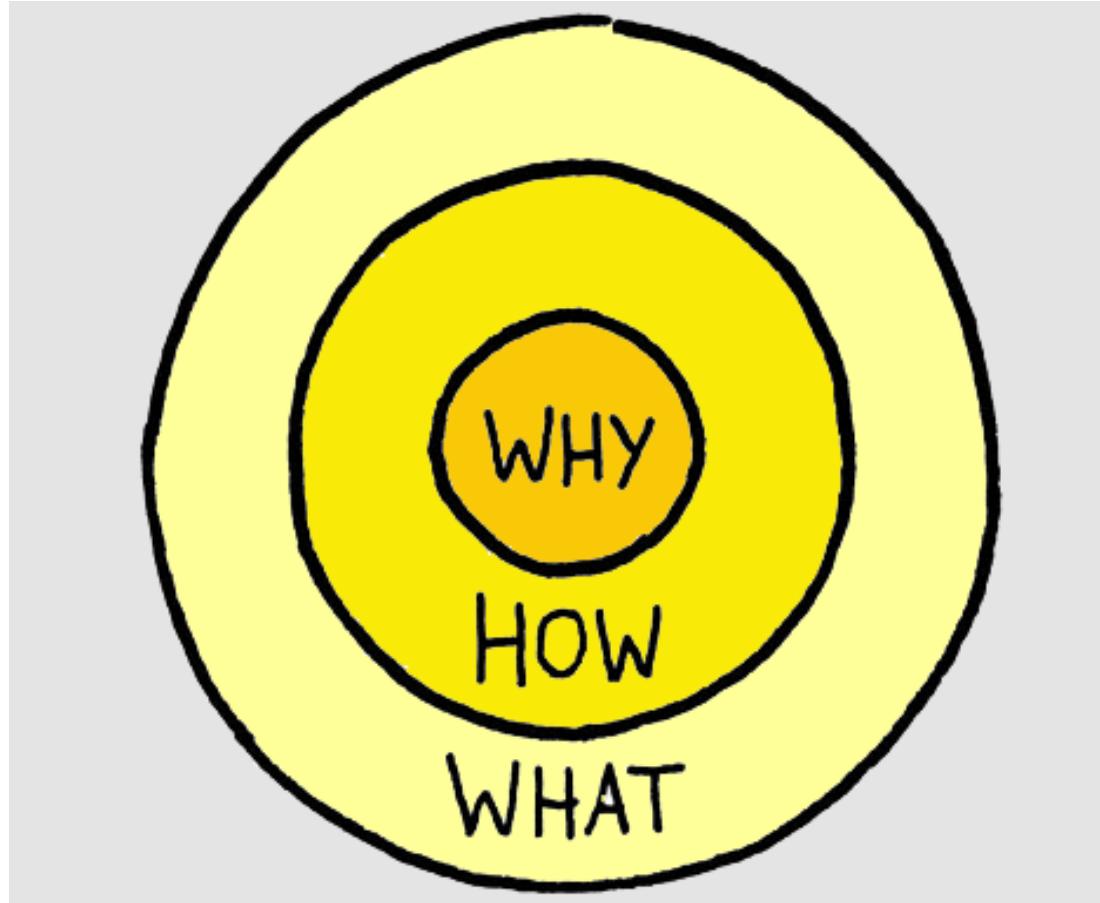
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Session objectives



- Understand how to strengthen the connection between WHAT you do, HOW you do it, and WHY you do it
- Learn a framework for continuous, data-driven improvement
- Apply an action planning framework to your work

Simon Sinek's Golden Circle



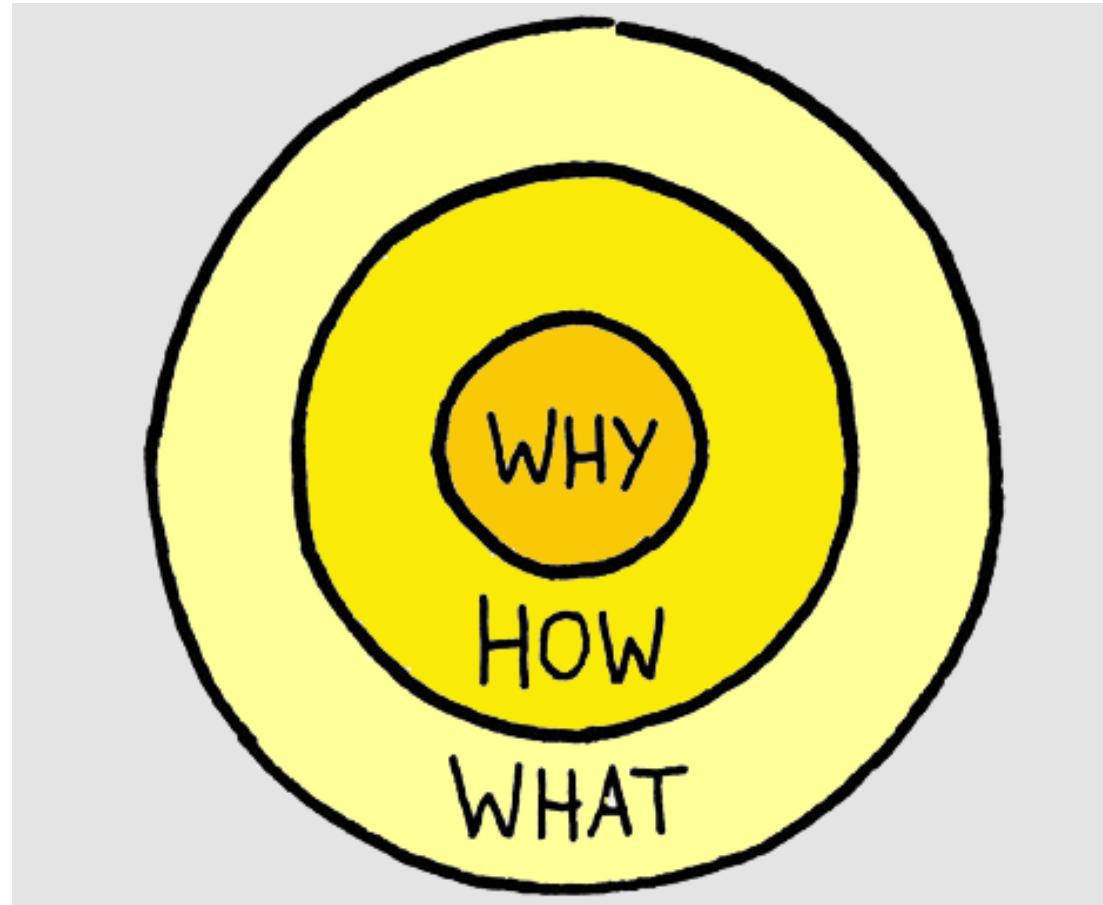
- Every organization knows “WHAT” they do
- Some organizations know “HOW” they do it
- Few organizations know “WHY” they do what they do

Michael Jr.: Know Your Why



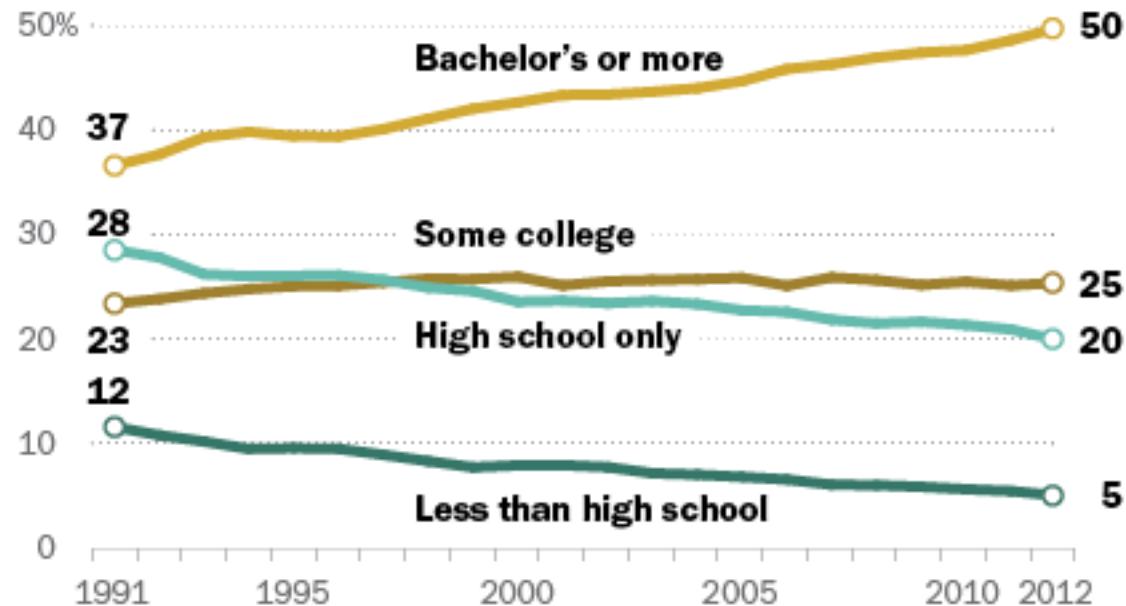
- <https://www.youtube.com/watch?v=LZe5y2D60YU>

Re-Introducing your facilitators



- Robert Dais – GEAR UP Massachusetts
- Rob Wessman – Koru Strategy Group

Percentage Distribution of U.S. Aggregate Household Income, by Education of Householder, 1991-2012



Notes: Household income figures by education are published for households with heads age 25 and older. Thus U.S. aggregate household income refers to the aggregate income of households age 25 and older. "Some college" includes households headed by those with associate's degrees, as well as some college but no degree. The Census Bureau revised the educational attainment classification in 1991, so pre 1991 figures are not strictly comparable to 1991 and thereafter.

Source: Pew Research Center tabulations of U.S. Census Bureau historical income tables

Income per Household, by Education of Householder, 1991 and 2012

In 2012 dollars



| EDUCATION | 1991 | 2012 | PERCENT CHANGE |
|-------------------------|-----------------|-----------------|----------------|
| All | \$63,816 | \$72,883 | +14% |
| Less than HS | \$33,959 | \$32,631 | -4% |
| High school | \$54,707 | \$52,199 | -5% |
| Some college, no degree | \$66,038 | \$63,008 | -5% |
| Associate's | \$72,407 | \$68,902 | -5% |
| Bachelor's | \$92,289 | \$100,637 | +9% |
| Master's | \$104,193 | \$114,897 | +10% |
| Professional | \$150,869 | \$180,671 | +20% |
| Doctorate | \$131,365 | \$150,087 | +14% |

Notes: Household income figures by education are published for households with heads age 25 and older. The Census Bureau revised the educational attainment classification in 1991, so pre 1991 figures are not strictly comparable to 1991 and thereafter.

Source: Pew Research Center tabulations of U.S. Census Bureau historical income tables



U.S. EDUCATIONAL ATTAINMENT

Young Adults Completing High School & College at Record Levels



Record-Breaking Attainment

For the first time ever, of American adults ages 25 and over...

31% 

have a bachelor's degree, compared with **12%** of comparable adults in 1971.

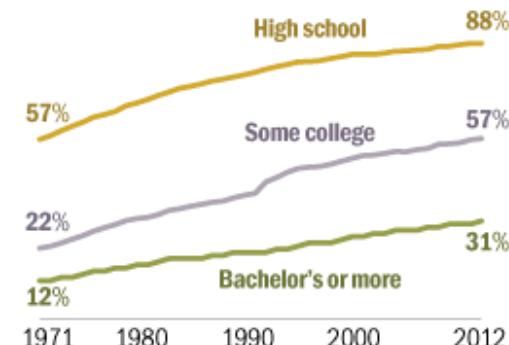
57% 

have completed at least some college education, compared with **22%** of adults in 1971.

88% 

have completed high school, compared with **57%** of adults in 1971.

Steady Growth of Education & Degrees
Trend in educational attainment, ages 25+



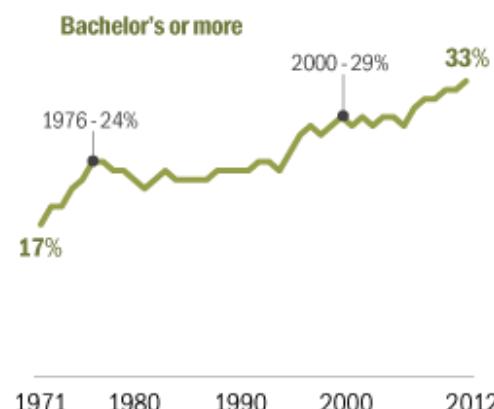
What has caused this change?

There are several explanations. First, the poor economy of recent years has led many young adults who can't find work to pursue more education. Second, surveys show that the public is much more inclined now than in the past to say getting a college degree is important to success in life. Third, today's recent immigrants are much better educated than those who came before.

Record Highs in Higher Education

Completion of 4-year college degrees among adults 25-29 years old has increased sharply, particularly in the past 5 years.

Record levels of bachelor's degree attainment in 2012 are apparent for key demographic groups.



 **30%**

of males 25-29 had finished college in 2012, a historic high and up from **28%** in 2011.

 **37%**

of females 25-29 had finished college in 2012. Women's educational levels have grown steadily over the past 40 years.

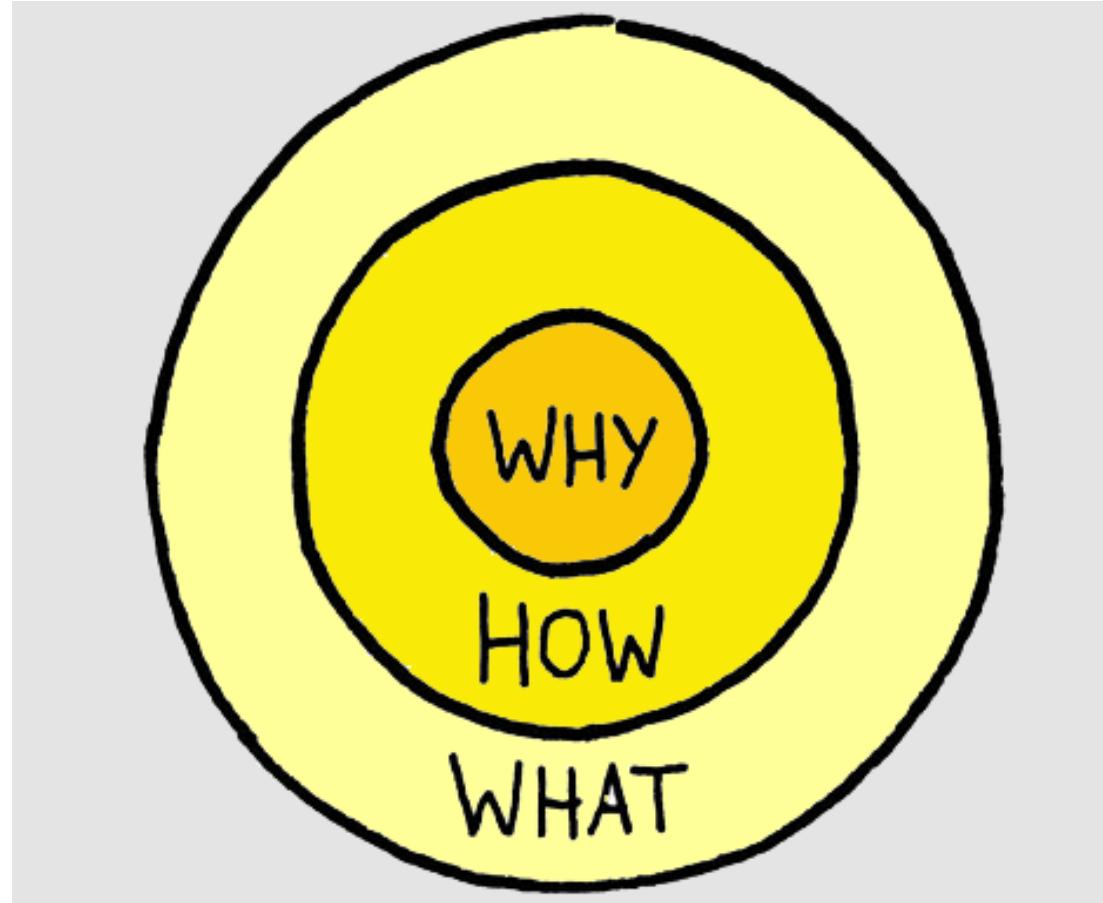
Life expectancy study – (2016)



- The gap in life expectancy between the richest 1% and poorest 1% of individuals was 14.6 years (95% CI, 14.4 to 14.8 years) for men and 10.1 years (95% CI, 9.9 to 10.3 years) for women.
- Over past 15 years, higher income individuals added 2-3 years to life expectancy, where lower income individuals added .04 - .36 years

Source: Chetty R, Stepner M, Abraham S, Lin S, Scuderi B, Turner N, Bergeron A, Cutler D. The Association Between Income and Life Expectancy in the United States, 2001-2014. *JAMA*. 2016;315(16):1750–1766.
doi:10.1001/jama.2016.4226

Prepare your “why” introduction



- What is your purpose in your work?
- Why do you care about what you do?
- How does that connect with your organization?



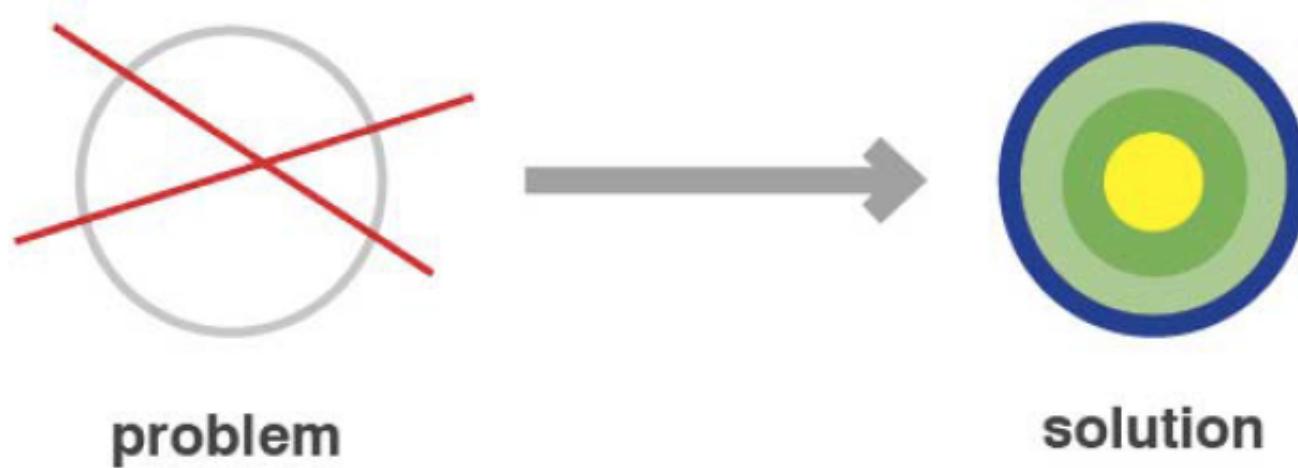
Understanding continuous improvement

The Challenge Before Us

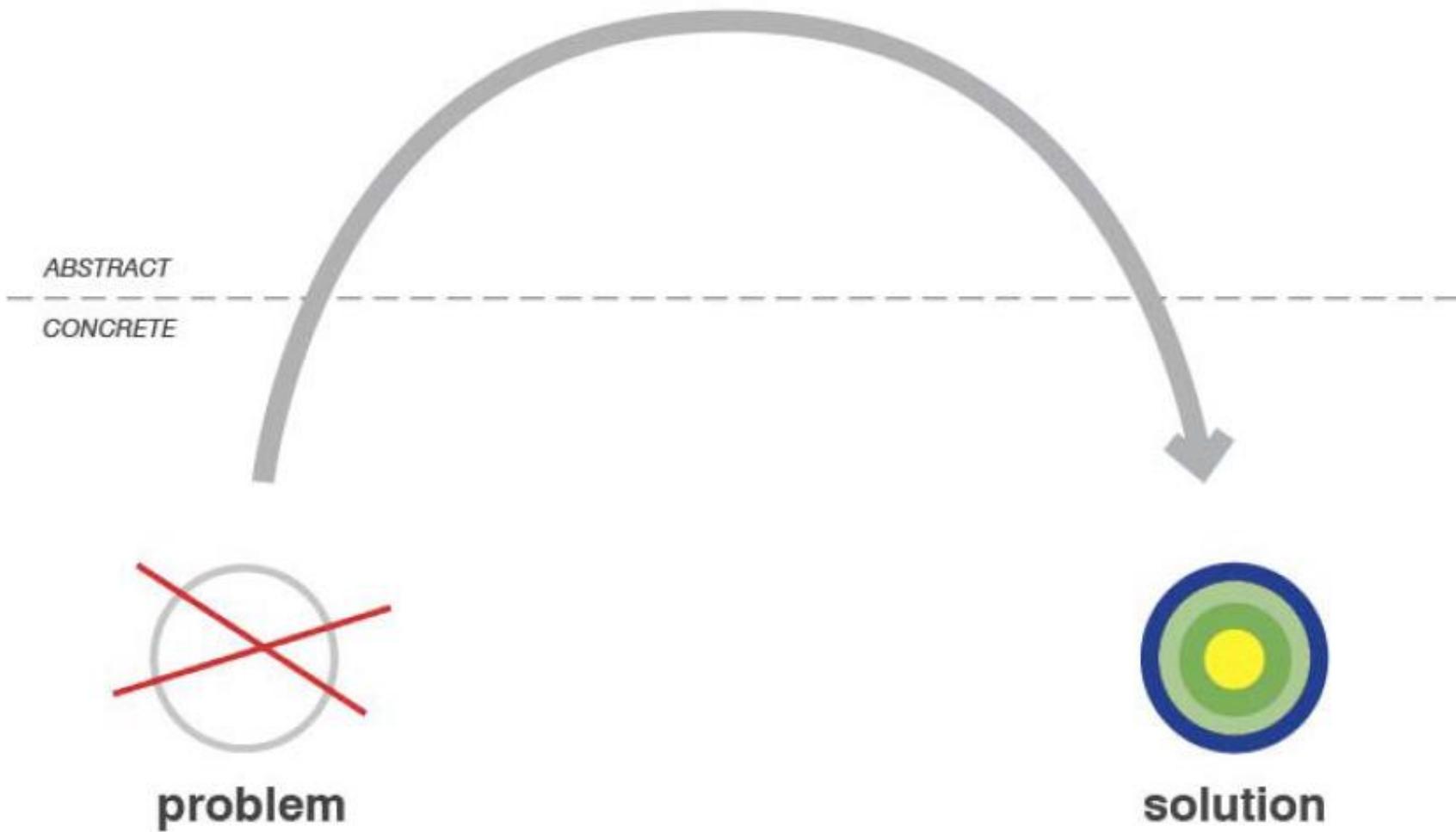


- We generate a lot of data, but don't know how to use it to improve
- Discussing data to identify areas to improve can feel personal and unsafe
- We jump to new programs and projects too early

Typical Problem-Solving Approach



A Different Approach



ACE Habits of Mind



- Shared commitment to ACTION, ASSESSMENT, and ADJUSTMENT
- Intentional COLLABORATION
- Relentless focus on EVIDENCE



The Data Wise Improvement Process

<https://datawise.gse.harvard.edu>

Preparing for continuous improvement



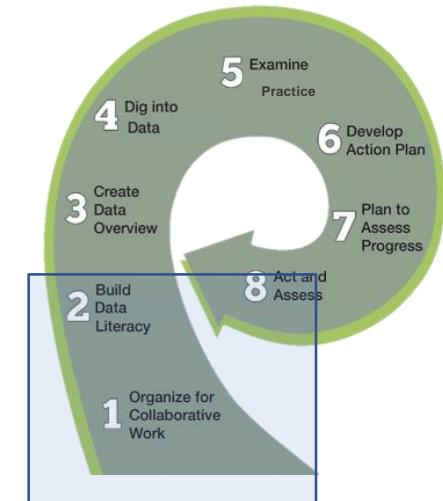
- Has your organization adopted a continuous improvement process?
- Do you have a strong system of teams?
- Have you set aside time for collaborative work?
- Do you have strong norms for working together?
- Do you use effective meeting practices?
- Do you know each others' work-style preferences?



Preparing for continuous improvement



- Have you identified high quality data sources important to your work?
- Do you have an inventory of all the projects or initiatives you manage?
- Do you understand what your organization measures and why?
- Do you know how to read data reports?
- Do you know how to use data responsibly?



Let's practice



- Based on your organization's WHY and any guiding documents you have, name one important focus area you would like to improve.

Some examples:

- Summer melt
- College acceptance
- Getting to graduation
- Paying for college

Getting prepared

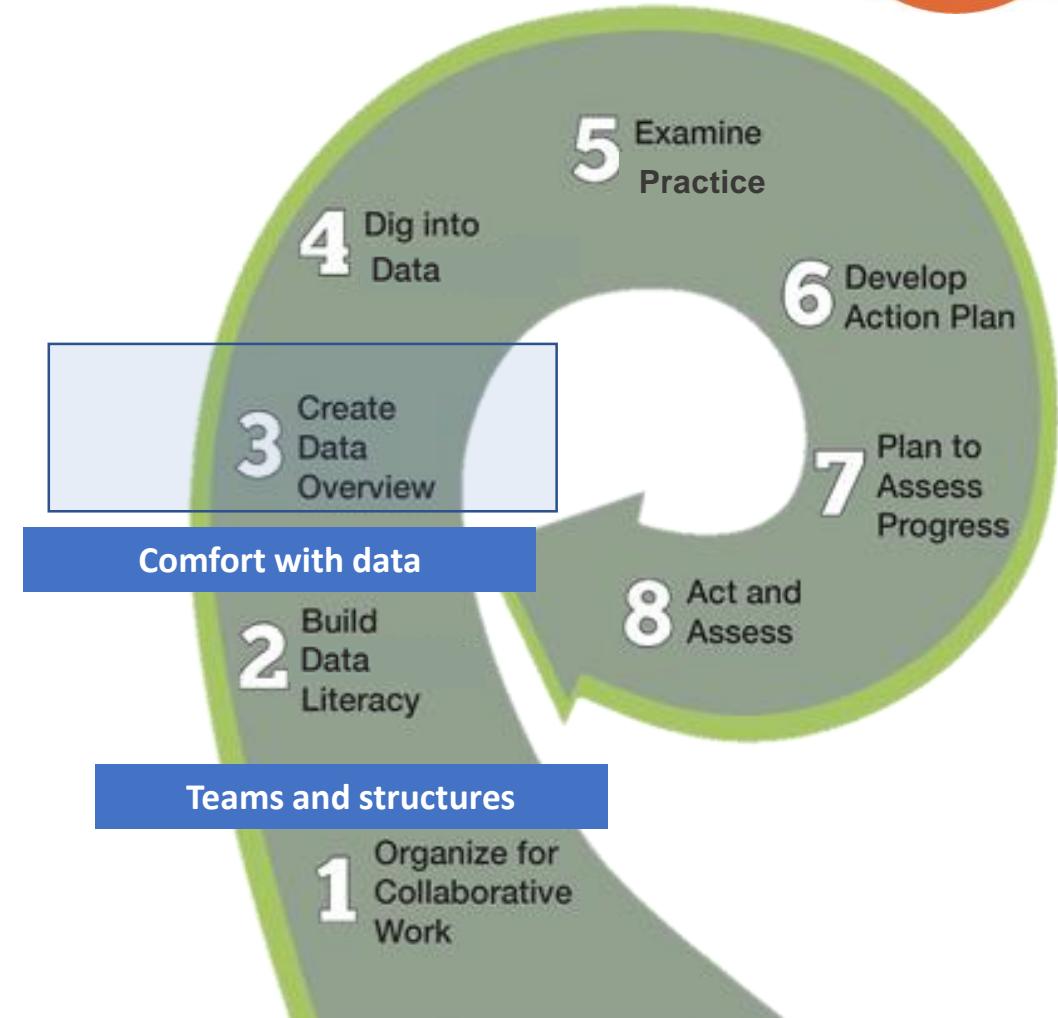


- Based on your chosen focus area, determine the following:
 - Who is on the team that will LEAD this improvement effort?
 - Who will be involved in ENACTING this improvement effort?
 - What are the DATA SOURCES that will help you know how you are doing?
 - Do we need to CREATE new data sources?
 - Do we need to STRENGTHEN the data sources we have?

An example of an inquiry cycle in action



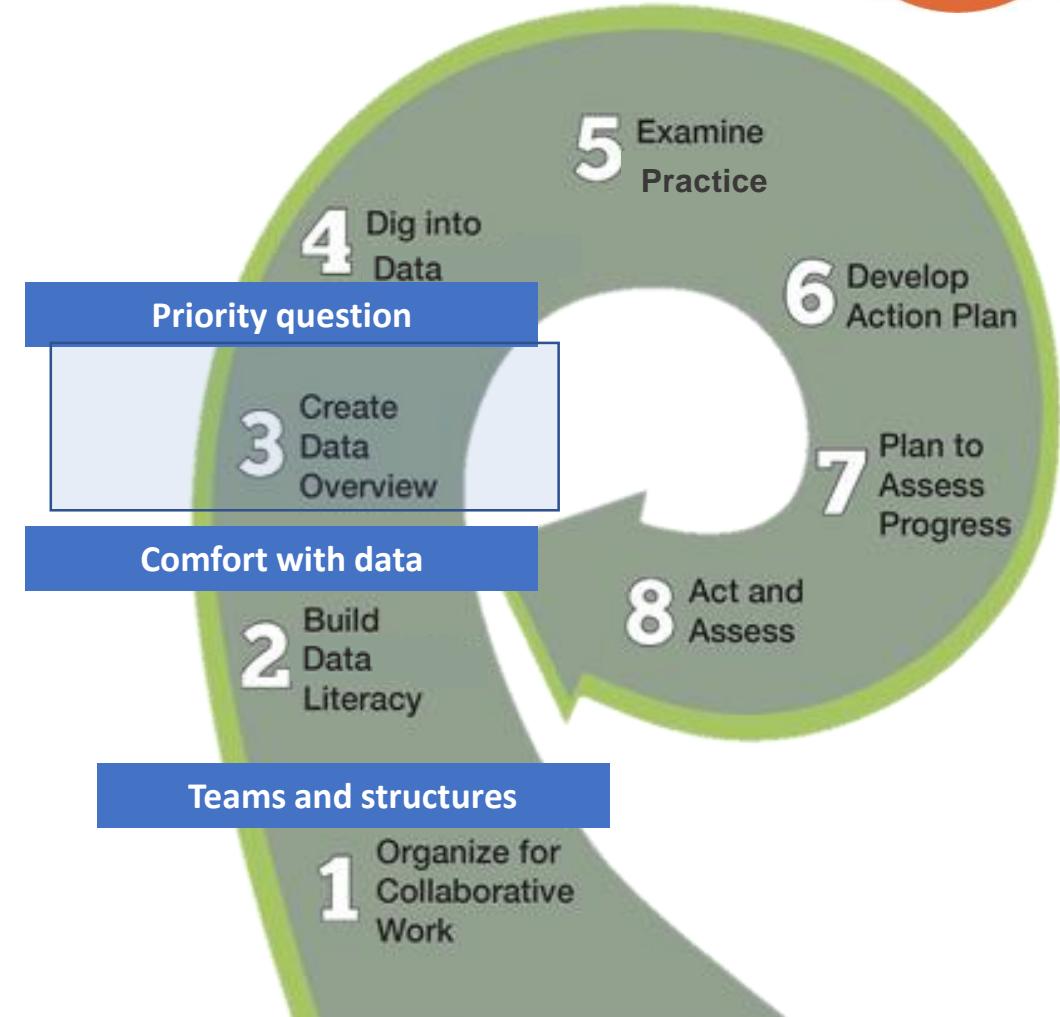
- A leadership team sets a focus area
 - Paying for college



An example of an inquiry cycle in action



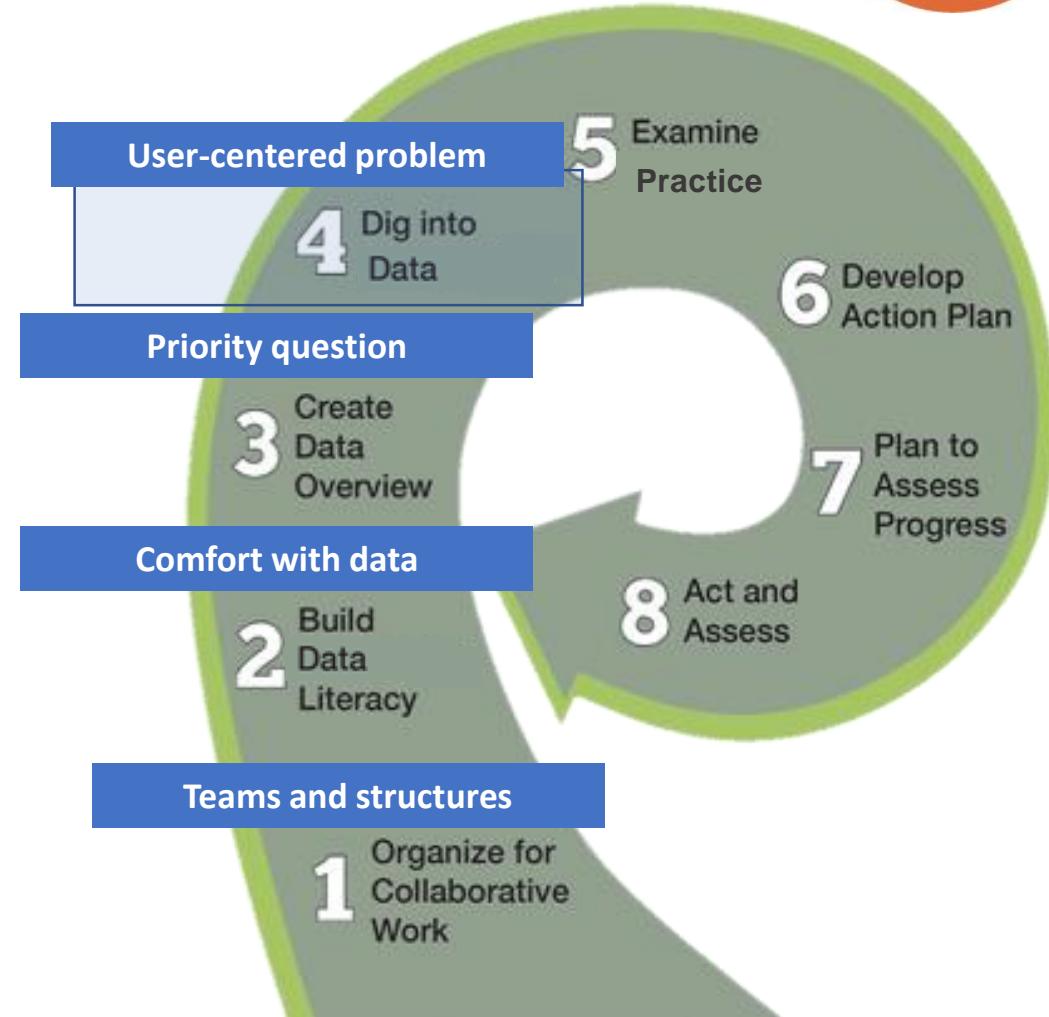
- Leadership team creates a data overview to highlight the data story and give staff members a chance to consider a question to dig into further
 - **“With which part of the FAFSA process do students struggle most?”**



An example of an inquiry cycle in action



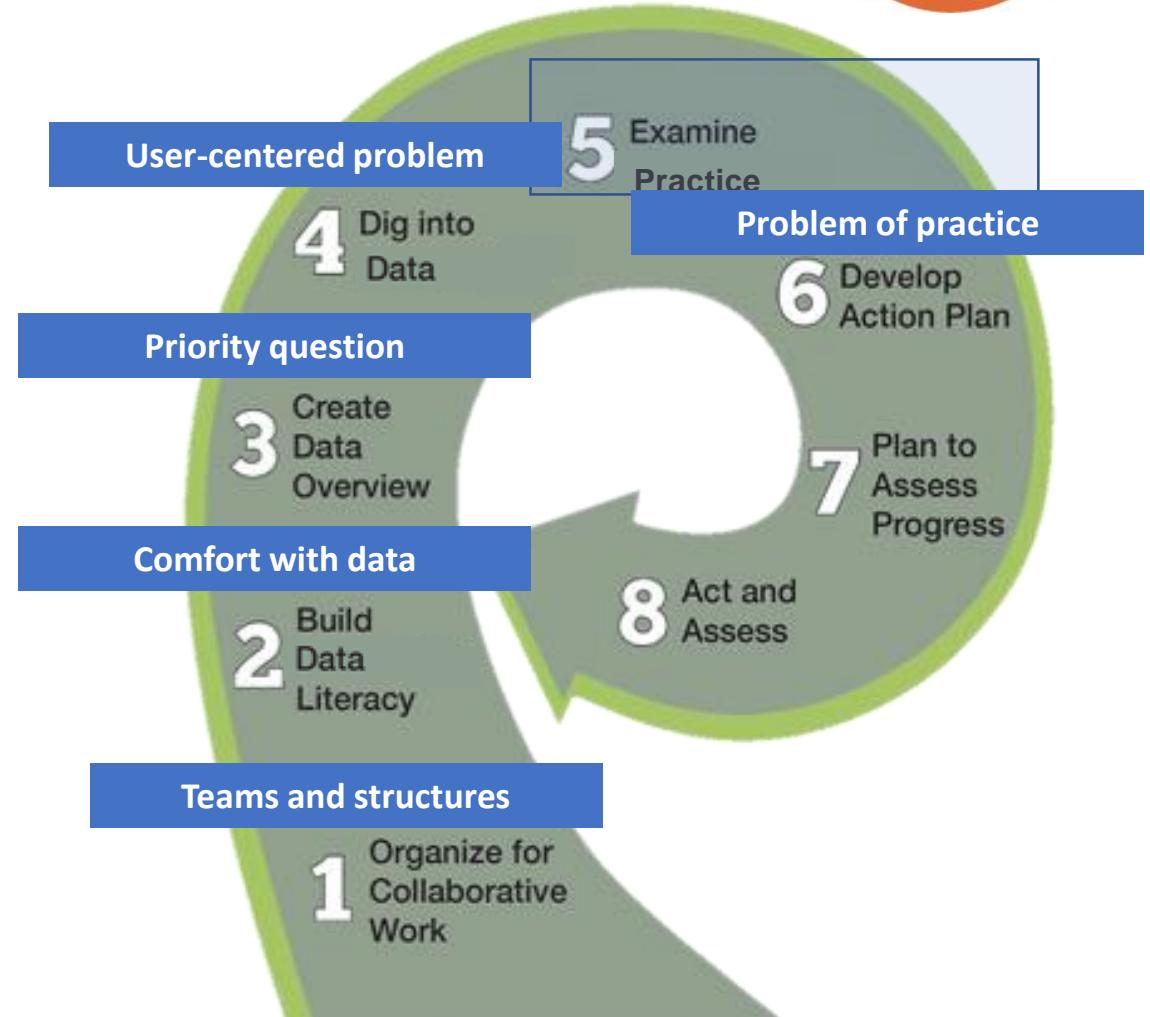
- The staff meets together to dig into a wide range of data to determine a learner (or user)-centered problem
- **“Students are able to locate the FAFSA form and begin filling out information; students struggle with the financial section of the FAFSA because they have misconceptions and fears about the requirement.”**



An example of an inquiry cycle in action



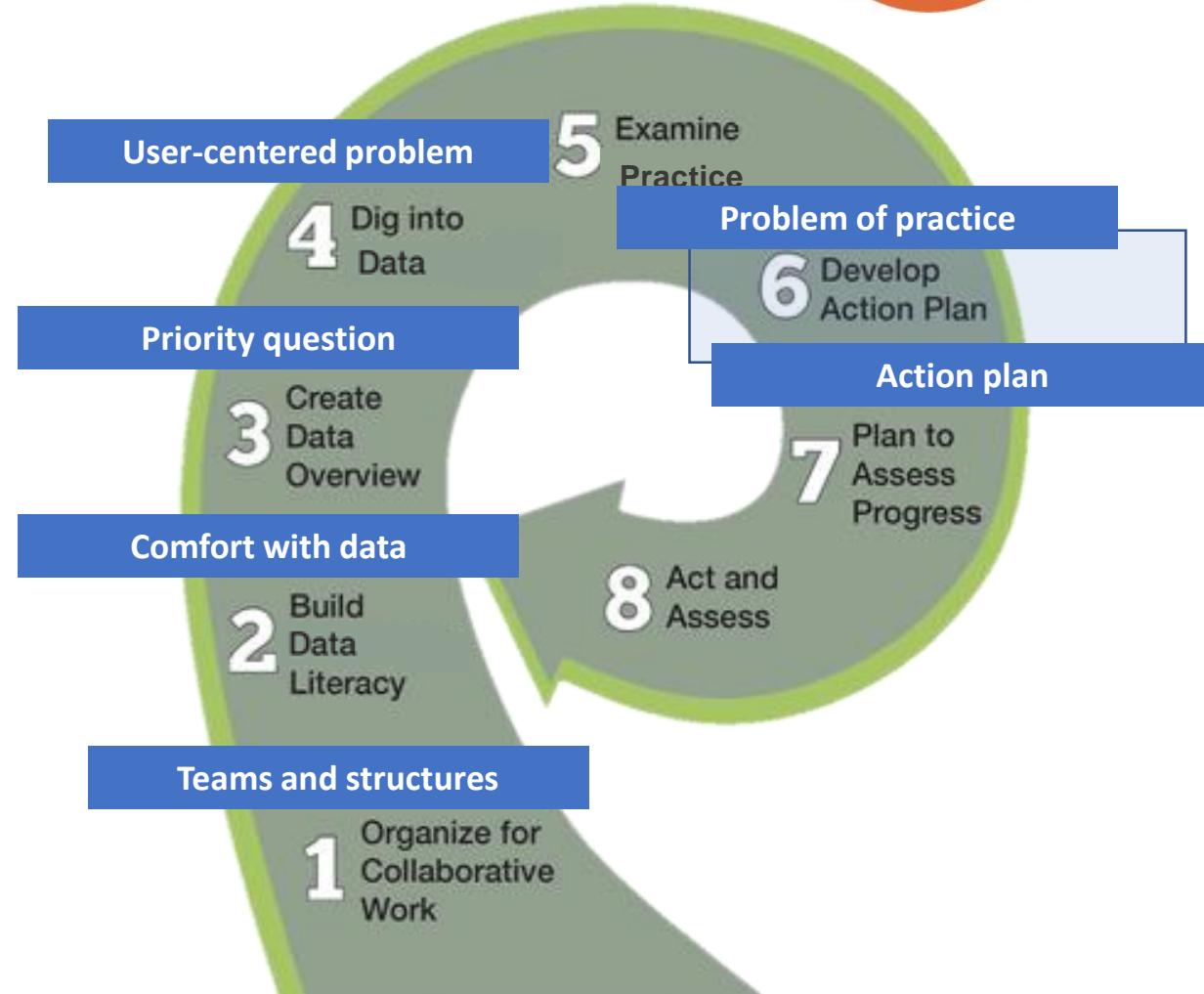
- Staff examines evidence related to their practice and forms a “problem of practice” statement
 - As coordinators, we help students fill out their forms; we do not spend time resolving confusion and fears about the use of financial data.



An example of an inquiry cycle in action



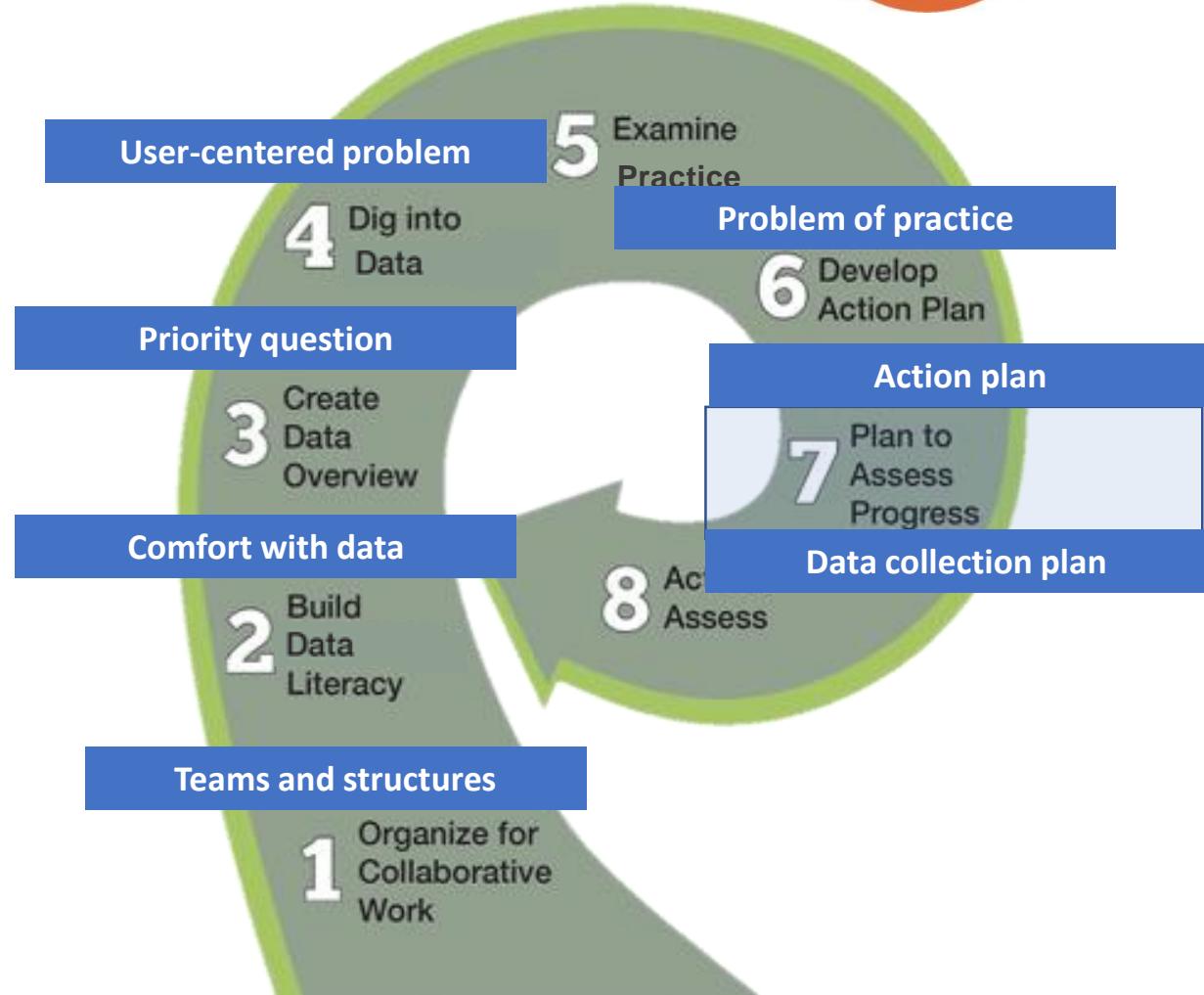
- Staff creates an action plan to address the problem of practice
 - **Prepare a 15 minute discussion script with a handout on the role and use of financial data in the FAFSA, including tips and next actions students can take**



An example of an inquiry cycle in action



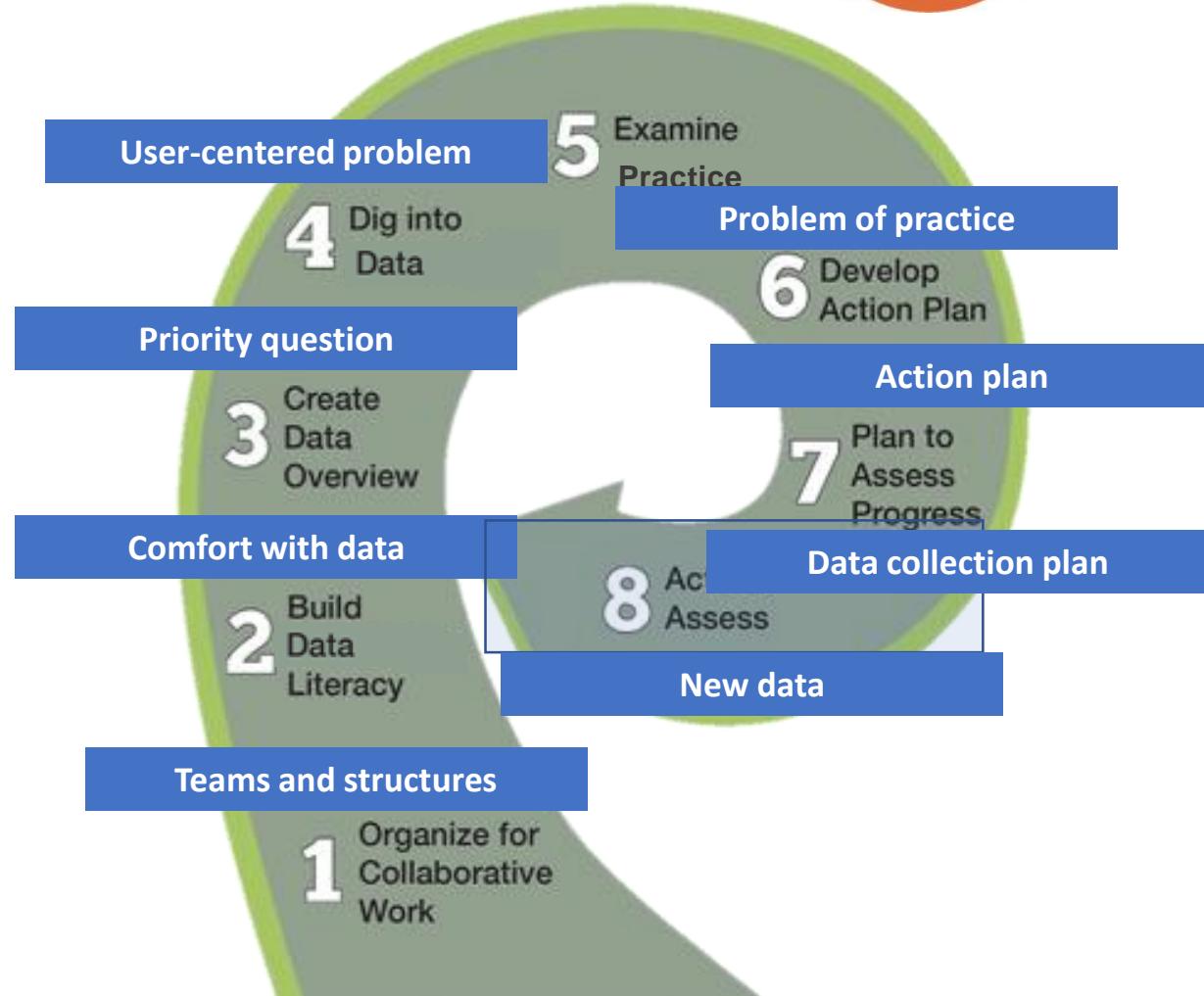
- Staff determines how to measure progress and sets goals
 - **Track student progress on FAFSA forms, 80% will complete forms by October**
 1. Survey comments and feedback reflect greater comfort with financial forms



An example of an inquiry cycle in action



- Staff enacts the action plan. They observe new practice, collect new data and meet to adjust the action plan as needed.



Data Wise Throughline Worksheet

**Step
3**

**Step
4**

**Step
5**

**Step
6**

**Step
7**

| | |
|---|--|
| <p>focus area (DW p. 68)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Relates to core mission. <input type="checkbox"/> Narrows scope of inquiry while remaining broad enough to be relevant to many/most staff members. | <p>Leadership team chose this focus area: Paying for college</p> |
| <p>priority question (DW p. 84-85)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Arises from a collaborative process. <input type="checkbox"/> Helps us know what data to dig into next. <input type="checkbox"/> Relates to core mission. <input type="checkbox"/> Is within our control. <input type="checkbox"/> Is genuinely intriguing to staff. | <p>Broad staff group identified this priority question: With which part of the FAFSA process do students struggle most?</p> |
| <p>user-centered problem (DW p. 104)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Is directly related to priority question. <input type="checkbox"/> Is based on multiple data sources. <input type="checkbox"/> Is about core mission. <input type="checkbox"/> Is within our control. <input type="checkbox"/> Is a <i>statement</i>, not a question. <input type="checkbox"/> Is specific and small <input type="checkbox"/> Identifies strengths to build on | <p>Staff team agreed on this user-centered problem: Students are able to locate the FAFSA form and begin filling out information; students struggle with the financial section of the FAFSA because they have misconceptions and fears about the requirement.</p> |
| <p>problem of practice (DW p. 110)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Is directly related to the user-centered problem. <input type="checkbox"/> Is based on evidence found when examining practice. <input type="checkbox"/> Is within our control. <input type="checkbox"/> Is a <i>statement</i>, not a question. <input type="checkbox"/> Is specific and small <input type="checkbox"/> Identifies strengths to build on | <p>Staff team agreed on this problem of practice: As coordinators, we help students fill out their forms; we do not spend time resolving confusion and fears about the use of financial data.</p> |
| <p>action plan (DW p. 134)</p> <ul style="list-style-type: none"> <input type="checkbox"/> States specifically what staff will do to address the problem of practice. <input type="checkbox"/> Contains one or more research-based, high-leverage strategies. <input type="checkbox"/> Assigns responsibility to specific people. <input type="checkbox"/> Is time-bound. | <p>Teacher team agreed on this instructional strategy: Prepare a 15 minute discussion script with a handout on the role and use of financial data in the FAFSA, including tips and next actions students can take</p> |
| <p>plan to assess progress (DW p. 152)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Clarifies evidence that would show whether action plan addresses the user-centered problem. <input type="checkbox"/> Includes short-, medium-, and long-term data sources. <input type="checkbox"/> Includes specific, measurable goals. | <p>Staff team agreed on using these data sources: Track student progress on FAFSA forms, 80% will complete forms by October 1. Survey comments and feedback reflect greater comfort with financial forms.</p> |

7-7-7 Finding the story in the data



- You may use your own data, or the data we prepared for you
- 7 min: Review the data to find the story of what is happening in your focus area
- 7 min: Share with a partner or team your findings
- 7 min: Write 3-5 boring headlines about what you find. For example
 - 35% more GEAR UP students completing Algebra 1 in 7th grade in 2016
 - 65% of GEAR UP graduates complete first year of college

Next steps



- Create charts to share your story
- Use the data to learn what you need to learn
 - The purpose of data overviews is not to answer questions, but to generate them
- Dig further into data to identify a learner-centered problem



Setting goals and managing change

The Challenge Before Us



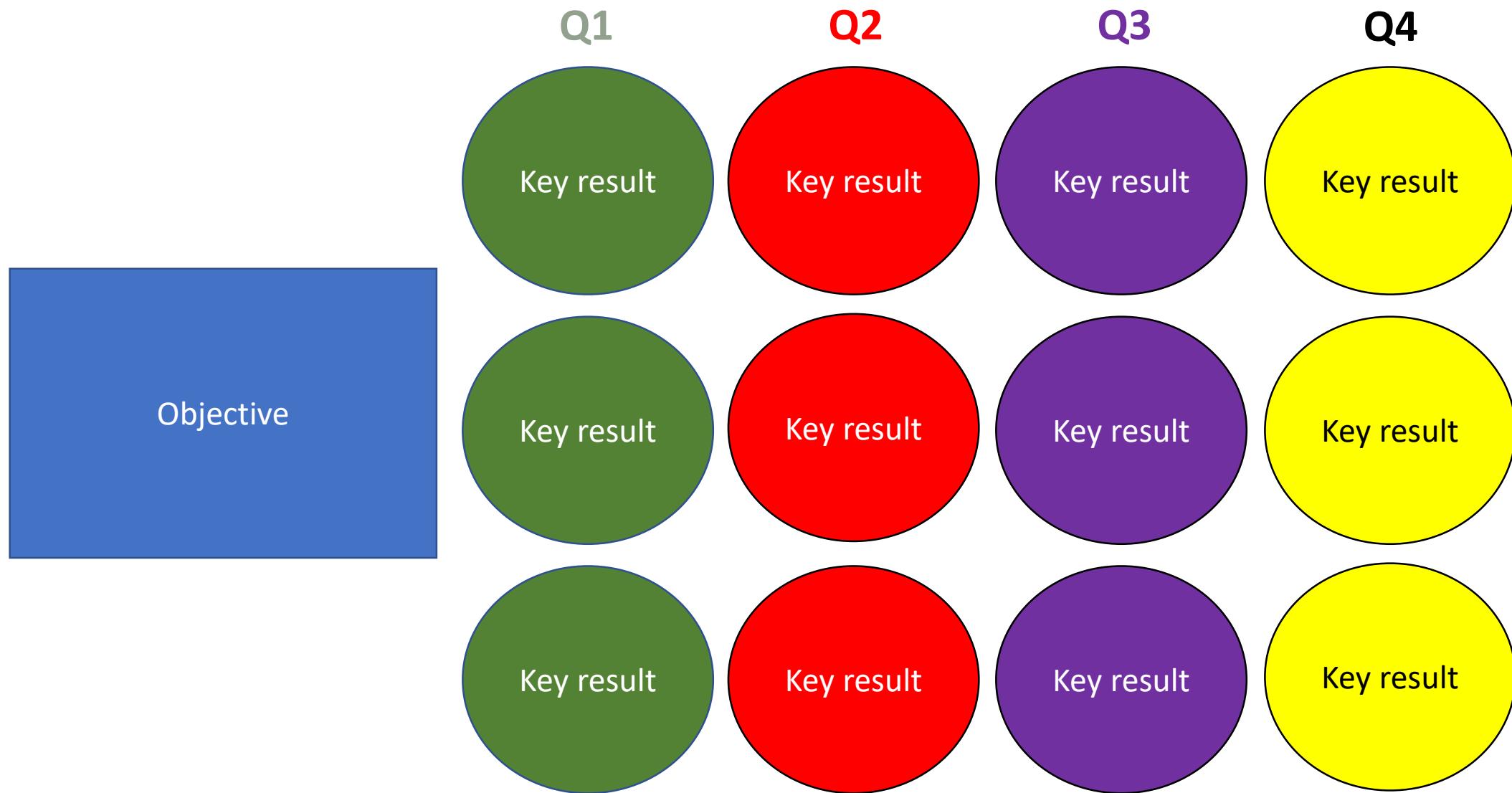
- When done well, goal setting in an organization can focus our efforts, give us something to strive for and celebrate
- When done poorly or not at all, goal setting can demotivate and erode confidence

Introducing OKRs



- Objectives and Key Results
- Andy Grove at Intel → John Doerr at Google → [Re: Work](#)
- Purpose is to help organization focus on priorities and stretch toward big achievements
- This should be someplace new you are going

Objectives and Key Results



Notes



- Objectives are ambitious and may feel somewhat uncomfortable. Limit to 3-5.
- Key results are measurable and easy to grade with a number (Google uses 0 -1.0)
- Sweet spot for an OKR grade is 60%-70%
- These should be shared publicly

Example of a stretch objective



- Objective: In 2018-19, we will implement and use a data-driven continuous improvement cycle as a leadership team to improve one core focus area
 - Key result 1: We have created a year-long calendar of bi-weekly meetings to use for improvement.
 - Key result 2: We have identified our key focus area and data sources
 - Key result 3: We have held a full staff meeting to share process, get input on our focus area, and collect feedback

Now you try



- Write one key objective for your organization. This is just a draft, so feel free to play around
 - Make it something you can do this year
 - Make sure it helps you get closer to fulfilling your “why”
 - Be forward thinking; make sure you have not already completed this objective
- Share with a partner

Next steps



- Share this objective with someone at your organization to get feedback. Set the appointment today
- Review the Re:work website for more information
- Consider key results that would help you get closer to your objective
- Repeat for two or three other objectives
- Set a schedule to check in on them

Reflection and feedback



PLUS

DELTA

PROVE. Elevating Data. Advancing Research. Improving Evaluation.



W W W . E D P A R T N E R S H I P S . O R G

Rob Wessman, CEO, Koru Strategy Group

Robert E. Dais, Statewide Director, GEAR UP