cim
COMPLIANCE AND IMPROVEMENT MONITORING

Data Observation Protocol

The data observation protocol may be used to support the analysis of any data set during Step 1 of the CIM Process. It may also be helpful during the root cause analysis process in Step 2.

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.

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: Shared notetaking materials and screen sharing

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/wonderings do you have?

- What additional information is needed to better understand the performance?

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.

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.

Adapted from a resource created by the System Improvement Leads (SIL): systemimprovement.org