PBC-DIDM Guide: Planning for and Facilitating Leadership Team Meetings

Produced by the "Practice-based Coaching Data-Informed Decision Making" model demonstration project funded by the Office of Special Education Programs (#H326M200021, Project Officer: Anita Vermeer), PBC-DIDM Guide: Planning for and Facilitating Leadership Team Meetings (Version 2.0). For more information, contact *pbcdidm@coe.ufl.edu*

Getting Started

This guide aligns with the Leadership Indicators on the PBC-DIDM Implementation Profile. It can be used to help teams (a) review the parts of the PBC-DIDM Model, (b) plan for a program-wide organizational structure for documenting and sharing PBC-DIDM data, and (c) learn about the Leadership Team Checklist indicators. If your program is just getting started with PBC-DIDM, check out the **PBC-DIDM Guide: Establishing a Leadership Team and Identifying a Lead Coach.**

What's in this Guide?

Seven Tips for a Great PBC-DIDM Leadership Team Meeting!

1. Invite the right people	Confirm everyone knows their role
2. Have a plan for the meeting	Use the checklist to guide your plan
3. Identify or clarify priority decisions to be made	Talk about why the decision is important
4. Share data	Orient the team to what they are looking at
5. Look at your data and talk about it	Invite the team to share
6. Decide what actions are needed	Identify feasible short- and long-term actions
7. Identify who will do what before the next meeting	Write it down, share it, and plan to check-in on progress

Getting to Know the PBC-DIDM Tools Used During Leadership Team Meetings

During PBC-DIDM Leadership Team Meetings, the parts of the **PBC-DIDM Model** are discussed. It will be important for the facilitator of the First Leadership Team Meeting to introduce and describe the parts of the PBC-DIDM Model tools and their use to other members of the Leadership Team. Refer to the **Resources** section of this guide for links to the Leadership Team Meeting checklists, agenda, and slide deck template.

PBC-DIDM Implementation Profile

The **PBC-DIDM Implementation Profile** supports Leadership Teams, Lead Coaches, Coaches, and other key stakeholders to reflect on their current use of PBC-DIDM. It supports programs in identifying strengths, needs, and goals to enhance their PBC-DIDM implementation. The Profile is initially completed in the **First Learnership Team Meeting** and reviewed in each **Ongoing Leadership Team Meeting**. As programs install, implement, sustain, and scale up PBC-DIDM, the Profile is used to measure progress.

Tips for Using the Profile in Leadership Team Meetings

⇒ Rate the Profile as a team. Each member of the Leadership Team brings a unique perspective and can provide context on how the team is implementing the Profile indicators within the program.

⇒ The Leadership Team confirms ratings when a workgroup engages with the Profile between meetings.

⇒ Review the Profile with any new team members before their first meeting.

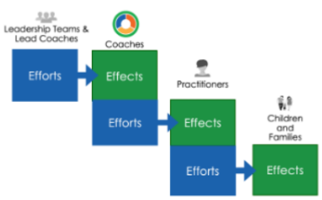
Sources of Effort and Effect Data

As part of PBC-DIDM, programs collect multiple **sources of data** about their efforts (*How much? How well?*) at different levels of implementation and examine the effects (*Are our efforts making a difference?*) of those efforts on the knowledge, skills, and dispositions of Lead Coaches, coaches, practitioners, children, and their families.

Tips for Discussing Sources of Effort and Effect Data in Leadership Team Meetings

⇒ Use the **PBC-DIDM Data Mapping Tool**. This tool is one way Leadership Teams, Lead Coaches, Coaches, and other stakeholders can record their current sources of effort and effect data, including key information about who is responsible for collecting, preparing, and sharing the data with others.

⇒ Review the terms ‘effort' and 'effect' and data sources being discussed with any new Team members before their first meeting.



PBC-DIDM Effort and Effect Cascade

The **PBC-DIDM Effort and Effect Cascade** is a framework for understanding how efforts at different levels of implementation (i.e., leadership, coaches, practitioners, and families) have a cascading effect on outcomes at other levels (e.g., the effects of coach efforts on practitioners' use of effective practices), ultimately leading to positive child outcomes. The Cascade supports Leadership Teams, Lead Coaches, coaches, and other key stakeholders in identifying how data about their efforts and effects are connected.

Tips for Using the Cascade in Leadership Team Meetings

⇒ Use the **PBC-DIDM Effort and Effect Cascade Handout** to help the Team consider their role within the PBC-DIDM Initiative and to visually document the effort and effect data being collected.

⇒ Review the Cascade with any new Team members before their first meeting.

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Prepare, Look, Think, Act (PLTA) Process

The **Prepare, Look, Think, Act (PLTA) Process** guides Leadership Teams, coaches, and other key stakeholders in using effort and effect data, as well as other sources of information, to make data-informed decisions. To use the PLTA Process

(1) identify a decision to make,
(2) prepare and display data related to the decision,
(3) look at data and think about what it shows, and use knowledge and experiences to inform how the data are interpreted and used, and
(4) identify actions or next steps for the Leadership Team, Coaches, or other key stakeholders to take related to the decision.

The PLTA Process is briefly introduced in the **First Leadership Team Meeting** as one part of the PBC-DIDM Model. All **Ongoing Leadership Team Meetings** are structured to guide the Leadership Team through the PLTA Process.

Tips for Using the PLTA Process in Leadership Team Meetings

⇒ Take notes on the **PBC-DIDM Prepare, Look, Think, Act (PLTA) Process Handout**, which helps the Team to plan for and document PLTA discussions.
⇒ Review the PLTA Process with any new members before their first meeting.

Collecting and Organizing Leadership Team Meeting Resources and Data

Within PBC-DIDM, data are collected on efforts at different implementation levels and their effects on the knowledge and skills of coaches, practitioners, children, and their families. Collecting data in an electronic system helps programs to:

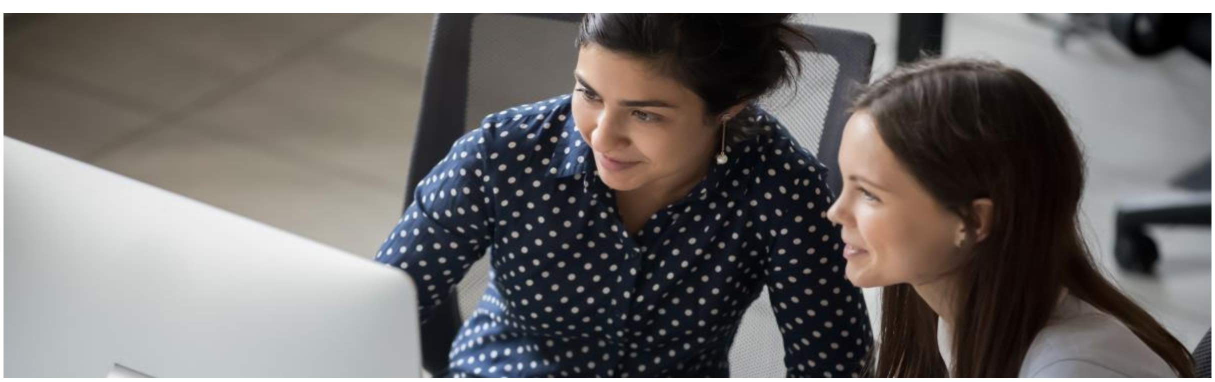
(a) enhance data quality by minimizing incomplete or inaccurate responses,
(b) engage in timely data-informed decision making about program-wide professional learning, and
(c) identify and provide "just-in-time" individualized PBC supports for individuals who want or need more support.

Below are some considerations for collecting and organizing Leadership Team resources and data connected to Leadership Team efforts.

Try out the *PBC-DIDM Data Mapping Tool* to organize information about when and how data are collected in the program.

Identify Shared Electronic System(s)

- Identify the electronic systems your program currently utilizes to collect and store data.
    - Collection platforms will include electronic forms that can be modified.
    - Storage platforms will be electronic file folders for organizing resources related to PBC-DIDM.
- If the program has not established a shared electronic system or the existing system does not meet the needs of your PBC-DIDM efforts, consider researching other electronic systems that may be a good fit for your program.
- During the first Leadership Team Meeting, the Team will identify or confirm where PBC-DIDM resources and data are stored.



Document, Organize, and Share Resources and Data

- The Leadership Team holds regular meetings. For each meeting, the Lead Coach will develop and share an agenda before the meeting and provide notes following the meeting. The Team will also review their PBC-DIDM Implementation Profile in each meeting.
- During or after the Leadership Team Meetings, the Team will document, save, and store resources in a shared location, including
  - *First or Ongoing Leadership Team Meeting Checklist,*
  - *PBC-DIDM Implementation Profile, and*
  - slides, data displays, data files, handouts associated with the PLTA Process, etc.
- Use the file-naming conventions provided at the bottom of each PBC-DIDM form or create your own method for naming files so they can be easily identified and located using electronic search tools. PBC-DIDM file name conventions often include information about the program or coach, file type, and date. See Figure 1. Example File Naming Convention.

Figure 1. Example File Naming Convention

Example File Name	What it means
ProgramID-FLTM-mm.dd.yyyy *Ex. Rainbow-FLTM-08.22.2025*	Name of program First Leadership Team Meeting Date
ProgramID-OLTM-mm.dd.yyyy *Ex. Rainbow-OLTM-09.25.2025*	Name of program Ongoing Leadership Team Meeting Date
ProgramID-Profile-mm.dd.yyyy *Ex. Rainbow-Profile-08.25.2025*	Name of program PBC-DIDM Implementation Profile Date

Considerations for Electronic File Organization Structure

- Think about who within the program will need access to the information and nest or sequence the electronic files accordingly.
- Typically, programs create a file folder for each Leadership Team meeting to support quick access to relevant materials. However, some items may be kept outside the meeting folder over time and copied into it as needed.
  - ⇒ For example, many programs like to keep all copies of their Profile in one place because it may be referenced in Leadership Team Meetings, Leadership Team workgroups, or Coach Community Learning Experiences.
- Make an electronic data form if the Checklist, log, or survey is used multiple times. Electronic forms can help the Lead Coach and the Leadership Team identify patterns in the data over time.
  - For example, using a data form for the PBC-DIDM Ongoing Leadership Team Meeting Checklist is helpful because it is complete for each Leadership Team Meeting. For most programs, it would not be helpful to use a data form for the PBC-DIDM First Leadership Team Meeting Checklist, since it is completed only once.
- Identify a process for archiving information rather than deleting files when possible.
  - ⇒ For example, rather than deleting a completed PBC-DIDM Implementation Profile, move the electronic file to an "old" or "archive" folder so you can review progress or check notes from prior documents as needed. This is also a nice way to back up files and prevent data loss.

Figure 2. Example Leadership Team Meeting File Folder

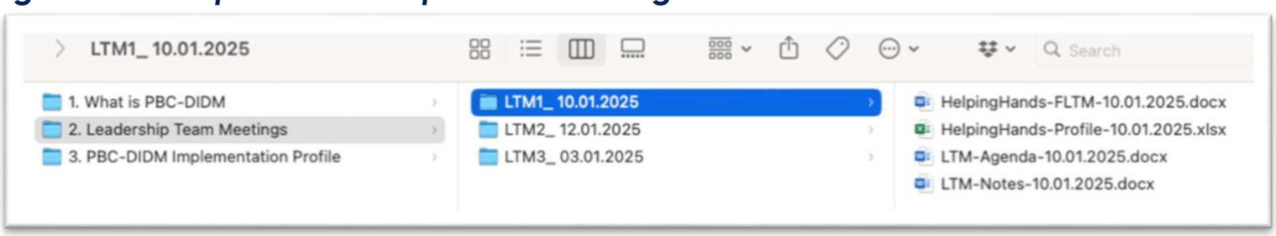


Figure 3. Example PBC-DIDM Implementation Profile File Folder Archive

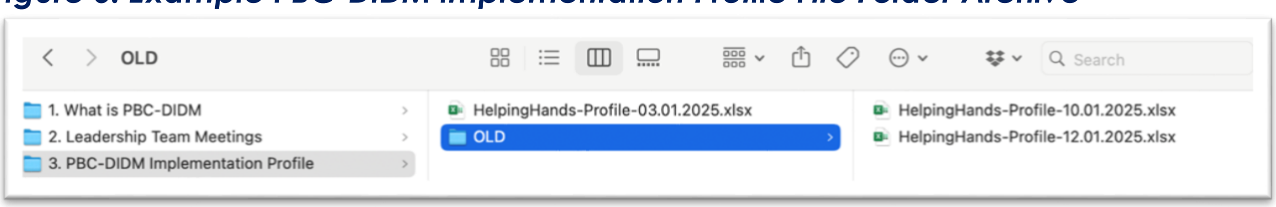


Figure 4. Example File Organization

PBC-DIDM *(Folder accessible to anyone in the program)*

- What is PBC-DIDM? (Folder accessible to anyone in the program)
  - ⇒ PBC-DIDM Informational Flyer
  - ⇒ PBC-DIDM Coach and Lead Coach Competencies

- Leadership Team Meetings (Folder and subfolders accessible to Leadership Team)
  - ⇒ LTM1: 10.01.2025
    - ▪ LTM-Agenda-10.01.2025 (Document)
    - ▪ LTM-Notes-10.01.2025 (Document)
    - ▪ HelpingHands-FLTM-10.01.2025 (Document)
    - ▪ HelpingHands-Profile-10.01.2025 (Tool/Spreadsheet)
  - ⇒ LTM2: 12.01.2025
    - ▪ LTM-Agenda-12.01.2025 (Document)
    - ▪ LTM-Notes-12.01.2025 (Document)
    - ▪ HelpingHands-OLTM-12.01.2025 (Document entered Data Form)
    - ▪ HelpingHands-Profile-12.01.2025 (Tool/Spreadsheet – copy of the file completed during the 10.01.2025 meeting to be updated)
  - ⇒ LTM2: 03.01.2025
    - ▪ LTM-Agenda-03.01.2025 (Document)
    - ▪ LTM-Notes-03.01.2025 (Document)
    - ▪ HelpingHands-OLTM-03.01.2025 (Document entered Data Form)
    - ▪ HelpingHands-Profile-03.01.2025 (Tool/Spreadsheet – copy of the file completed during the 12.01.2025 meeting to be updated)
  - ⇒ Ongoing Leadership Team Meeting Checklist (Electronic Data Form)
    - ▪ HelpingHands-OLTM-12.01.2025 (Data Entry)
    - ▪ HelpingHands-OLTM-03.01.2025 (Data Entry)

- PBC-DIDM Implementation Profile (Folder accessible to Leadership and Coaches)
    - ▪ HelpingHands-Profile-03.01.2025 (Most Current Tool/Spreadsheet)
    - ▪ Archive *(Folder for old versions of the Profile)*
      - HelpingHands-Profile-10.01.2025
      - HelpingHands-Profile-12.01.2025

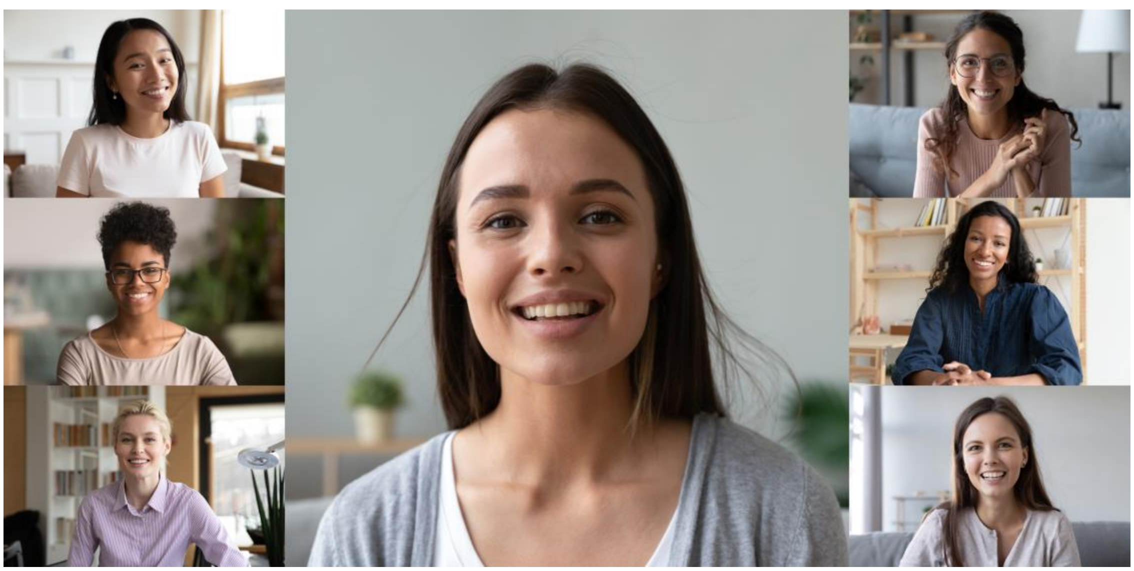
Planning for and Facilitating the First Leadership Team Meeting

Before the first PBC-DIDM Leadership Team Meeting, it will be important to identify who will facilitate the meeting. Typically, the Lead Coach facilitates Leadership Team Meetings; however, if the Lead Coach has not been identified or hired, someone else from within the program, or an external PBC-DIDM Consultant,[1] will need to fulfill that role. Refer to the **PBC-DIDM Guide: Establishing a Leadership Team and Identifying a Lead Coach** to learn more about these roles and the importance of the Leadership Team Meeting for PBC-DIDM implementation.

The first Leadership Team Meeting follows the **PBC-DIDM First Leadership Team Meeting Checklist** and is distinct from ongoing meetings because it is designed to

- introduce the Team to the parts of the **PBC-DIDM Model** described earlier in this guide,
- help all members of the Team to understand their important contributions, and
- introduces the Team to the PBC-DIDM Implementation Profile.

Leadership Team Meetings are held regularly (at least 3 times a year) and can be conducted in person, virtually, or in a hybrid format. Below are tips and considerations to ensure the Team is ready.



[1] During the Office of Special Education Model Demonstration Project, PBC-DIDM team members facilitated and guided implementation and then transitioned those responsibilities to Program Leaders and the Lead Coach over time. Depending on the characteristics of the program and the experience Leadership Team Members have with installing evidence-based practices an external consultant may or may not be needed.

Planning and Scheduling for the First Meeting

At least two weeks before the first Leadership Team Meeting:

⇒ Review the **PBC-DIDM First Leadership Team Meeting Checklist**, and see **Table 1** in this Guide for checklist indicators guidance

⇒ If the Team cannot find 90-120 minutes for the first meeting, plan to complete indicators 1-4 and 8-10 in one meeting, while scheduling indicators 5-7 for a follow-up meeting

⇒ Create **a meeting agenda** using the Checklist as a guide to ensure there is a plan for how to discuss the indicators on the Checklist

⇒ Explore options for electronic file storage within the program. See the **Collecting and Organizing Leadership Team Meeting Data and Resources** section of this guide for more information

At least one week before the first Leadership Team Meeting, send Team members the following materials:

⇒ A calendar invitation with the time (~90-120 min), location, and agenda

⇒ Materials or links for the Team to review before the First Leadership Team Meeting (e.g., **https://pbcdidm.com**)

At least one day before the First Leadership Team Meeting, prepare your resources and materials:

⇒ A **slide deck presentation** or plan for introducing the parts of the PBC-DIDM Model, see the **Getting to Know the PBC-DIDM Tools Used During the Leadership Team Meeting** section for more information

⇒ Ensure a strong wi-fi connection and the ability to share your sound

⇒ Print participant materials as needed

Indicator Guidance for the First Meeting

Table 1. First Leadership Team Meeting Checklist - Indicator Guidance

Indicators	Guidance	Example
1. Thank participants for attending, emphasizing the **value of diverse perspectives** when making data-informed decisions	Help participants feel like valued members of the team and set the expectation for them to engage and share their unique perspectives. Strategies: verbal statement or a soft opener/warm-up activity	"Thanks for attending our first Leadership Team Meeting! You have been invited to join because we want to ensure that each role within our program is represented. As we begin to use the PBC-DIDM Model, we encourage you to share your perspectives and expertise to help inform the decisions we will make related to PBC-DIDM."
2. Provide an **overview of the four parts of the PBC-DIDM Model** and facilitation structures that support implementation	Provide information to ensure that all team members understand the four parts of the PBC-DIDM Model. Strategies: short presentation about each part of the Model, time to explore the **PBC-DIDM Model** page on the website	"The PBC-DIDM Model has four key parts and three structures that help to facilitate PBC-DIDM success. You received the link to the website before today's meeting, so I am going to go over the parts of the Model briefly, and then we'll jump into what PBC-DIDM means for our program."
3. Discuss how the PBC-DIDM Model will benefit the program	Promote understanding of how the PBC-DIDM Model aligns with other program priorities and will have a positive impact on the program. Strategies: Brief verbal summary, connect to program policy or funding language, invite other members of the Team to share benefits and connections based on the parts of the Model discussed	"We've worked hard over the past year to adopt an evidence-informed approach to coaching, and PBC-DIDM is going to help us collect and use data so we can be more intentional about the support we provide our coaches and practitioners."
4. Use the *PBC-DIDM Effort and Effect Cascade* to invite participants to **reflect on**	Help participants identify how their strengths related to PBC-DIDM and their knowledge, skills, and experiences will benefit the team.	"Who on the Team and within our program might be part of the Leadership efforts at the top of the Cascade?"

their contributions to the Leadership Team and **consider if additional people need to participate** in the Team	Strategies: Visual of **Cascade** in slide deck or **PBC-DIDM Effort and Effect Cascade Handout**, open-ended questions, wait time	"Looking across the Cascade, which effort block is most aligned with your work within the program?"
5. Use the *PBC-DIDM Implementation Profile* to gather input from Team members about current practices and PBC-DIDM **priorities**	The **PBC-DIDM Implementation Profile** supports Leadership Teams, coaches, and other key stakeholders in reflecting on their current implementation of PBC-DIDM and helping them identify strengths, needs, and goals to enhance implementation. The Lead Coach will pull up the Profile and guide the Team in rating the Profile indicators. See the "Instructions Tab" in the Profile for more information. * Can be addressed in a follow-up meeting	"During today's meeting, one of our primary activities is to begin rating the Profile indicators. This Tool will help us identify our PBC-DIDM strengths and prioritize actions for implementing PBC-DIDM. I've pulled up the Profile on the screen for us to begin using the Tool today. At the end of the meeting, we'll discuss where we want to store our PBC-DIDM materials in the future. Let's get started!"
6. Review and collaboratively discuss *PBC-DIDM Implementation Profile* indicators to **identify 2-3 priorities for action**	After collaboratively rating the Profile indicators, the facilitator summarizes what has occurred and guides the team in identifying 2-3 priorities for immediate (e.g., 2-3 months) and future actions (e.g., within the year) or goals. * Can be addressed in a follow-up meeting	"Now that we have rated the Foundational and Initial Tier, what are some of the indicators we want to target over the next few months?"
7. **Confirm action step details** and include information about who is responsible and a timeline for completion in the meeting notes	Determine who will be responsible for the action steps. Action steps can be recorded on page 2 of the ***PBC-DIDM First Leadership Team Meeting Checklist*** or the Goals tab of the ***PBC-DIDM Implementation Profile***. Discussing action steps in detail and writing them down helps all Team members with shared accountability between meetings. * Can be addressed in a follow-up meeting	"Ok, I have that Celia is going to create a Coach Community Calendar and send out the invitation to coaches this week. Thomas, you said you would work on putting the practitioner survey into an electronic format next week. And then Sherry is going to share our PBC-DIDM work and some data with the executive board on the first Tuesday of next month."

8. **Establish recurring meetings** for the Team and send a calendar invite	PBC-DIDM Leadership Team Meetings occur at least 3 times per year and are typically 90 minutes. Confirm a time for the PBC-DIDM Leadership Team to meet regularly and add the meeting dates to the calendar, including a video-conference link on the calendar invite if needed. Teams are encouraged to plan meeting dates through the end of the year.	"We've identified quarterly meeting dates for the next year, and I'll get those calendar invites out following today's meeting. Please prioritize attending these meetings to ensure this Team can benefit from your expertise and that we can be efficient and effective in making decisions when we come together."
9. Establish a **shared electronic folder** for PBC-DIDM resources	Confirm an electronic system that will be used for PBC-DIDM resources and meeting notes. Refer to "**Collecting and Organizing Leadership Team Meeting Data and Resources"** in this guide for more information.	"I've added a PBC-DIDM folder to our shared drive, and that's where we'll keep all PBC-DIDM materials going forward, including the notes from today. Please take a moment to confirm you have access to the folders."
10. Email notes to the Team and save them in a shared electronic folder	Keep the team informed about what occurred during the meeting. Sending this information by email and uploading it to a shared electronic folder provides two ways for Team members to refer to the information between meetings.	"As I mentioned, I'll link the folder to the calendar invite, and I'll send out an email tomorrow with the action items we identified. Our next meeting will be on October 1st. Thank you all for your time today! I'm excited about where this team is headed and the support, we'll be able to provide for our coaches, practitioners, children, and families!"

Planning for and Facilitating Ongoing Leadership Team Meetings

Ongoing Leadership Meetings follow the **PBC-DIDM Ongoing Leadership Team Meeting Checklist** and occur regularly (e.g., at least 3 times a year). Ongoing meetings can take place in person, virtually, or using a hybrid approach. Regardless of the meeting format used, it will be essential for the Lead Coach and other facilitators to provide access to a **shared electronic folder** containing meeting resources.

Before the Ongoing PBC-DIDM Leadership Team Meeting, it will be important for the Lead Coach and other facilitators to gather information about:

- updates or feedback from the Coach Community,
- progress made since the last Leadership Team meeting,
- PBC-DIDM Implementation Profile edits, if applicable,
- new priority decisions to be made, and
- relevant data for engaging in the Prepare, Look, Think, Act process.

These sources of information, along with the **Ongoing PBC-DIDM Leadership Team Meeting Checklist**, will guide decisions on whether additional people should be part of the PBC-DIDM Leadership Team, the development of the meeting agenda, and, if needed, a slide deck presentation. To review the considerations for Leadership Team Meeting members, refer to the **PBC-DIDM Guide: Establishing a Leadership Team and Identifying a Lead Coach.**

Planning for and Scheduling Ongoing Meetings

At least two weeks before the Leadership Team Meeting,

⇒ Review the **PBC-DIDM Ongoing Leadership Team Meeting Checklist**, and see **Table 2** in this guide for checklist indicators guidance
⇒ Create a **meeting agenda** using the Checklist as a guide to ensure there is a plan for how to discuss the indicators on the Checklist
⇒ Verify the PBC-DIDM decision and prepare data for the Team to discuss

At least one week before the Leadership Team Meeting, send the team members the following materials:

⇒ A calendar invite verifying the meeting time and location (~90 min)
⇒ A meeting agenda
⇒ A link to the **shared electronic file folder** with materials for the meeting, including the PBC-DIDM Implementation Profile, the PLTA Process Handout, and data

At least one day before the Leadership Team Meeting, prepare:

⇒ A **slide deck presentation** or plan for sharing the PBC-DIDM Implementation Profile, and introducing the data for the **Prepare, Look, Think, Act (PLTA) Process**
⇒ Ensure a strong wi-fi connection and the ability to share your sound
⇒ Print participant materials as needed

During the meeting, promote engagement of all Team members, consider inviting participants to:

⇒ Co-facilitate the parts of the meeting
⇒ Take notes on the PLTA Process Handout, Profile, or Checklist
⇒ Monitor the time allocated to each activity on the agenda
⇒ Other roles (e.g., "parking lot" notes, cheerleader)

Indicator Guidance for Ongoing Meetings

Table 2. Ongoing Leadership Team Meeting Checklist - Indicator Guidance

Indicators	Guidance	Example
1. Thank participants for attending, emphasizing the **value of diverse perspectives** when making data-informed decisions	Help participants understand that they are valued members of the Team and establish team expectations that encourage engagement and the sharing of unique perspectives. Strategies: Verbal statement or a soft opener/warm-up activity	"Thank you, everyone, for making time to join us today. We look forward to analyzing our Practice-based Coaching Log data. This space is for us to ask questions, share thoughts, and perspectives so that we can be intentional and systematic about making data-informed decisions that are feasible and meaningful for our program."
2. **Discuss progress** related to *PBC-DIDM Implementation Profile* indicators and action(s) identified in the last meeting	Use the **PBC-DIDM Implementation Profile** by discussing the priority indicators and actions identified during the last meeting. Encourage Team members to celebrate their successes and problem-solve when needed. Strategies: Bulleting key information in the agenda, creating a visual slide in a PowerPoint, or by linking the *PBC-DIDM Implementation Profile* Goals tab for review and group discussion.	"We have been busy since the last time we met! We've had smaller workgroups moving forward with priorities related to IC5, which focuses on establishing a procedure for PBC Implementation Checks for coaches, as well as IL6 and IL7, which focus on collecting complete and accurate coaching data. So let me turn it over to those workgroups to provide an update."
3. Review the Prepare-Look-Think-Act (PLTA) Process and confirm all participants have a shared understanding of the steps	Ensure that all participants are aware of and can utilize the **PLTA Process** during the meeting. Strategies: Verbal review of the indicators, viewing a visual within a slide deck, or by looking at the **PLTA Process Handout**.	"We'll use the Prepare, Look, Think, Act (PLTA) Process today with our PBC Log data. Remember PLTA includes four steps (1) identify a decision to make, (2) prepare and display data related to the decision, (3) look at and think about what the data show and use knowledge and experiences to inform how the data are interpreted and used, and (4) identify actions or next steps related to the decision.

4. **Confirm the PBC-DIDM decision**(s) the Team would like to make today, including why making this decision is beneficial for the program	Ensure all participants understand the focus of the PLTA Process and how the decisions being made within the meeting are connected to other program goals or priorities. Most data files include multiple variables that can be analyzed in different ways depending on the question being asked or the decision being made. In the PBC-DIDM Model, effort and effect questions broadly guide the PLTA Process. Effort questions: How much? How well? Effect question: Are our efforts making a difference?	"The last time we met, we identified IL6 and IL7 as priorities. These Profile indicators are designed to confirm that data are timely, complete, and accurate. Today, we will examine the data on the number of coaching logs submitted for each coach and educator. The coaches have also explored their coaching log data in a recent PLTA Coach Learning Experience, identifying indicators where clarification may be helpful and where additional indicators could support data-informed coaching. We're making decisions today about how we can support coaches to submit PBC log data in the electronic system that is timely, complete, and accurate."
5. **Share prepared data** for the decision the Team is making	Ensure participants have access to the data to engage in the PLTA process. When data are introduced, it is essential to take the time to ensure that all Team members know when, why, and how the data are collected. This is important for participants who may not have a direct role in professional learning and PBC within the program. In addition, facilitators will need to orient the Team to key features of the data display, supporting their ability to interpret and analyze the data with other Team members.	"Coaching logs are used by the coach to guide their use of PBC and to document what happens when they meet with practitioners. Coaches submit a log in the electronic system within 48 hours of their meeting with the practitioner. Coaching logs include information about time, such as the length of the meeting, and quality, including whether the essential PBC coaching strategies were utilized. In addition to the averages for all coaches and each coach, we'll want to discuss indicators where coaches identified the need for more guidance to ensure the data are accurate."
6. Look at the data collaboratively and **describe decision-focused strengths and needs**. Consider if	Ensure participants are guided in Looking and Thinking about both program strengths and areas of need related to the data being shared.	"As you look at these data, what stands out to you as some strengths for our program?" "What might be areas where we can strengthen our efforts?"

additional information is needed	Strategies: Open-ended questions, wait time, use of the PLTA Process Handout	"What questions do you have about these data?"
7. Think about the data and collaboratively **discuss possible actions** aligned with the decision focus of the meeting	Ensure participants work together to identify and discuss possible actions to take related to the decision being made making. Teams consider and discuss the feasibility of potential actions, identify possible barriers, and determine who needs to be engaged as additional personnel. Strategies: Open-ended questions, wait time, pro-con list in notes	"So, we're noticing that we may need to provide additional guidance around how to report time for observation and follow-up, and when to check the coaching strategies – what are some strategies we might put in place using the electronic system or communicating this information to coaches?"
8. Prioritize immediate and future action(s) related to the decision(s)	Ensure participants choose which actions the Team wants to take and by when. Often, teams identify additional decisions to be made, data to explore, and new or revised supports for Coaches and Practitioners when they engage in the PLTA process. Focus on what is feasible and most important to the program given the available resources (e.g., prioritizing some actions to occur immediately while others happen in a few months). Strategies: Record notes using an agreed-upon Tool such as the Profile Action Plan, PLTA Handout, or Agenda	"We talked about several tasks that build on each other. We will continue to work on IL6 and IL7 related to the timely, complete, and accurate collection of data, and have identified IC2 and IC5 as indicators to engage and support Coaches in the process of using PBC logs. First, we will revise the electronic system based on the coach feedback data to add those prompts and guidance within the form. Then, we can use an upcoming Coach Community Meeting to share the revised guidance. In a few months, we'll also want to check back in on the self-reported PBC Logs alongside the Implementation Check data to see how accurate self-reported data are and if the additional guidance is making a difference. Let's timeline these steps out on the Goals tab of the *PBC-DIDM Implementation Profile*."
9. **Confirm action(s)** and include information about who is responsible	Determine which members of the Team and program will be engaged in each action	"Ok, I have that Celia is going to edit the electronic Coaching Log by the 15th to add guidance statements. Thomas, you said you

and a timeline for completion in the meeting notes	step and when it would be feasible to complete each step. Strategies: Record notes using an agreed-upon Tool such as the Profile Action Plan, PLTA Handout, or Agenda	would work on scheduling the Coach supports over the next quarter. And then Sherry will share our PBC-DIDM work and some data with the executive board on the first Tuesday of next month. We planned to meet again on November 11th at 10:00 am. Is that still going to work for everyone?"
10. **Email notes to the Team** and save them in a shared electronic folder	Save the Leadership Team Meeting notes about what occurred during the meeting in a shared electronic location accessible to all members of the Team. Sending via email and uploading them to a shared electronic folder provides two ways members of the Team can refer to the information between meetings. See "**Collecting and Organizing Leadership Team Meeting Resources and Data"** in this Guide for more information on setting up the electronic folders.	"I've saved the updated Profile and notes from today's meeting in our shared PBC-DIDM folder. Can everyone see those documents? Katie was out today. Who can touch base with her this week to catch her up on what was discussed?"

Resources

Website Pages:

⇒ **PBC-DIDM Model**
⇒ **Use PBC-DIDM**
⇒ **Leadership Teams and Lead Coaches**

Modules:

⇒ **PBC-DIDM Leadership Team Considerations**

Videos:

⇒ **Seven Tips for a Great PBC-DIDM Leadership Team Meeting**

Checklists and Data Forms

⇒ **PBC-DIDM First Leadership Team Meeting Checklist**
⇒ **PBC-DIDM Ongoing Leadership Team Meeting Checklist**
⇒ **PBC-DIDM Leadership Team and Coach Feedback Survey**

PBC-DIDM Tools

⇒ **PBC-DIDM Implementation Profile**
⇒ **PBC-DIDM Data Mapping Tool**
⇒ **PBC-DIDM PLTA Process Handout**
⇒ **PBC-DIDM Effort and Effect Cascade Handout**

Other Guides

⇒ **PBC-DIDM Guide: Establishing a PBC-DIDM Leadership Team**

Templates:

⇒ **Leadership Team Meeting Agenda Template**