

Pankaj, V., & Emery, A. K. (2016). Data placemats: A facilitative technique designed to enhance stakeholder understanding of data. In R. S. Fierro, A. Schwartz, & D. H. Smart (Eds.), *Evaluation and Facilitation. New Directions for Evaluation*, 149, 81–93.

# 6

## Data Placemats: A Facilitative Technique Designed to Enhance Stakeholder Understanding of Data

Veena Pankaj, Ann K. Emery

### Abstract

*This chapter introduces data placemats, a facilitative technique that occurs during the analysis stage of an evaluation that is designed to enhance stakeholder understanding of evaluation data. Data placemats display thematically grouped data designed to encourage stakeholder interaction with collected data and to promote the cocreation of meaning under the facilitative guidance of the evaluator. Each placemat represents the data using visual elements such as charts, graphs, and quotes and draws on best practices of data and information display to format these elements. During the process, evaluators guide stakeholders to a mutual understanding of information contained in the data placemats. This chapter provides guidance on when, why, and how to use data placemats to enhance the overall sense-making of data and explores the connection between effective facilitation and successful implementation of this technique. © 2016 Wiley Periodicals, Inc., and the American Evaluation Association.*

Decades of research on participatory evaluation have paved the way for understanding the connections between stakeholder involvement, stakeholder buy-in, and the overall utility of evaluation findings for action and improvement (Cousins & Chouinard, 2012). From the

work of our predecessors, we understand the value of engaging stakeholders in all phases of the evaluation life cycle. A number of facilitation techniques can be used to involve stakeholders in the planning phase of evaluation, such as the collaborative development of logic models through visual mapping exercises, group brainstorming to develop evaluation questions, and various voting techniques to prioritize the focus of the evaluation. Opportunities for stakeholder participation in the later stages—especially during analysis—are often overlooked.

In this chapter, we discuss a facilitative process designed to enhance stakeholder buy-in and understanding of data that can be employed during the analysis phase of the evaluation lifecycle. When used correctly, this process can help facilitate the analysis of data in a collaborative setting. Figure 6.1 illustrates the key components of this process. First, the evaluator analyzes data and organizes preliminary findings in the form of *data placemats*. Next, the evaluator facilitates a *data interpretation meeting* during which the evaluator guides stakeholders through the process of reading charts and verbalizing the key findings in their own words. Finally, the evaluator conducts *additional analyses* and produces a *final report* or other deliverable.

**Figure 6.1. The Facilitative Process at a Glance**



This facilitative process requires that the evaluator employs a combination of tools and techniques, including data placemats, data interpretation meetings, and facilitation skills.

### Data Placemats

A *data placemat* is an 11-by-17-inch sheet of paper that displays thematically grouped data in the form of charts, graphs, and quotes. Depending on the magnitude of the evaluation and the number of evaluation questions to be answered, evaluators may design anywhere between three and twelve different placemats. Data placemats allow the evaluator to share preliminary evaluation findings with stakeholders before presenting final evaluation findings. Sample data placemats are shown in Figure 6.2.



**Table 6.1. Technical and Adaptive Capacities**

<i>Technical Capacities</i>	<i>Adaptive Capacities</i>
<ul style="list-style-type: none"> <li>● Data analysis</li> <li>● Preparing meeting materials (placemats, agenda, questions for discussions, etc.)</li> <li>● Designing placemats</li> <li>● Scheduling the meeting</li> <li>● Making sure the right people are in the room</li> </ul>	<ul style="list-style-type: none"> <li>● Perceiving and interpreting real-time events</li> <li>● Making in-the-moment course corrections</li> <li>● Flexibility</li> <li>● Ability to nurture the flow of productive conversation</li> <li>● Ability to rely on intuition and instinct</li> </ul>

the learning journey and during the data interpretation meeting itself (see Table 6.1). Phase 1 of the learning journey—analyzing data and designing data placemats—draws heavily on the evaluator’s technical capacities. Phase 2—facilitating a data interpretation meeting—draws heavily on the evaluator’s adaptive capacities.

The following is an example of using some adaptive capacities while facilitating a data interpretation meeting.

One of our foundation clients wanted us to share evaluation findings with a variety of stakeholders, including foundation staff as well as a number of representatives from grantee organizations. Since this client was located in a different state, we decided to conserve evaluation resources by holding a single data interpretation meeting with all the different groups of stakeholders.

During the meeting with the foundation staff and grantees, we could tell from body language that the grantee stakeholders had not bought into the data or the process we were using to share the preliminary findings. The conversation felt stifled and was not adequately capturing the variety of viewpoints within the room. Using adaptive facilitation skills of perceiving and interpreting real-time events and incorporating flexibility, we realized that we needed to regroup and make mid-course corrections to our meeting agenda. At that moment, we paused the conversation surrounding the evaluation results and described what we felt was occurring within the room. The moment we acknowledged the grantees’ discomfort and tension, we sensed that we had gained their respect. We learned that grantee organizations did not feel that their viewpoints were included in the initial evaluation planning stages.

Next, we gave participants a 10-minute break so that we could strategize about how to best rearrange the agenda. When we reconvened as a group, we asked the grantee organizations to describe the types of questions that they thought were useful to answer through the evaluation. We showed them the data placemats that contained information about those evaluation questions, and the rest of the conversation went smoothly.

## Facilitating a Learning Journey

Data placemats and data interpretation meetings are intended to facilitate a learning journey among participating stakeholders. While most of this learning occurs during the data interpretation meeting, a considerable amount of evaluator preparation and facilitation must also take place before and after the data interpretation meeting.

**Phase 1. Before the data interpretation meeting.** Preparing for a data interpretation meeting is critical for success. Before the meeting, the evaluator must collect and analyze data, visualize the data and design data placemats, and schedule the data interpretation meeting with the appropriate group of stakeholders. The evaluator is balancing familiar roles: that of data collector, data analyst, data visualizer, client liaison, and meeting planner.

**Step 1.1. Conduct preliminary data analysis.** First, the evaluator conducts a preliminary analysis of the quantitative and/or qualitative data that has been collected through the evaluation. A preliminary analysis of qualitative data might consist of gathering key quotes and noting high-level themes. A preliminary analysis of quantitative data might involve descriptive statistics, frequencies, and simple cross-tabulations.

The goal is to involve stakeholders in the analysis process before results are complete and to use stakeholders' ideas as inspiration for areas in which to calculate inferential statistics to be included in the final report. The example below describes using stakeholders' reflections about preliminary analysis to inform future analysis.

During a 10-year retrospective evaluation of a one-year fellowship program, the fellowship program's management team was interested in program satisfaction rates. In particular, the management team sought to understand how fellows felt about the training curriculum, and the structure of the fellowship, their cohort of fellows, and the overall fellowship experience. When designing the data placemats, we included graphs that displayed satisfaction survey data about each of these topics.

During our data interpretation meeting, the funders noticed there was a substantial dip in satisfaction rates in Year 4 of the fellowship program. Using adaptive facilitation techniques, we were able to create a space for the management team to openly discuss potential reasons for this decline. The management team reflected upon Year 4 and remembered that there had been a change in recruitment strategies, which affected the type and number of people who were recruited.

With that information in hand, after the data interpretation meeting, we were able to go back to our office and map out the specific changes that were made in the recruitment process and explore the connections between the

programmatic changes and satisfaction rates across multiple variables. The data interpretation meeting enabled us to take a deeper dive into the data to better understand patterns and trends in the data and offer concrete suggestions for future recruitment.

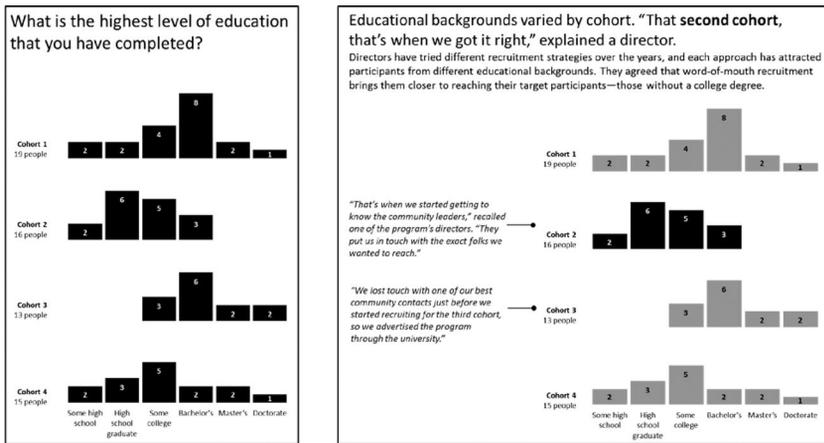
**Step 1.2. Design the data placemat(s).** When designing data placemats, the evaluator decides which preliminary patterns should be discussed during the data interpretation meeting; creates charts in Microsoft Excel or other data visualization software programs; and pastes the charts into Microsoft PowerPoint or Word.

During this stage, the evaluator is an *information architect*, a term coined by Richard Saul Wurman to describe the “professionals trained in organizing data and making sense of it” (as cited in Cairo, 2013, p. 15). As described by Cairo (2013), “Wurman suggests that one of the main goals of information architecture is to help users avoid information anxiety, the ‘black hole between data and knowledge’” (p. 15). Similarly, when applied to an evaluative context, the evaluator is a *data architect*: The evaluator constructs a data placemat or blueprint that contains answers to the stakeholders’ evaluation questions and then guides stakeholders down the path of interpretation during the data interpretation meeting.

On the surface, data placemats appear to be a simple collage of charts, but there are a number of intentional design decisions involved—described by Cairo (2013) as “not just an art” but as “the careful and restrained tinkering of an engineer” (p. 23).

- First, the evaluator chooses which pieces of data belong in the placemat based on his or her best guesses, assumptions, and instincts about the stakeholders’ interests and information needs.
- Second, the evaluator chooses how to use color to draw attention—or not—to patterns in the data. Evergreen and Metzner (2013) state that “color is one of the quickest elements to capture attention” (p. 11) in data visualizations and they argue that “for color to be used well, secondary information or data points should be simplified to a shade of gray so that chosen elements can appropriately stand out when selected emphasis is applied” (p. 9). A key principle throughout this three-phase facilitation process is that the evaluator is creating a space for stakeholders to interpret data for themselves. Accordingly, data placemats should not draw stakeholders’ attention to any single pattern over another. Figure 6.3 illustrates the distinction between using a monochromatic color scheme when designing a data placemat (left) and selectively drawing attention to one takeaway message when designing charts for a final report (right). The frequency counts are identical, the small multiples histograms are identical, but the shading is intentionally different.
- Third, the evaluator chooses how much and what type of text to include. Data placemats should include generic titles, subtitles, and labels,

**Figure 6.3. Graphs With and Without Color Emphasis and Interpretive Text for Data Placemats (Left) and Final Reports (Right)**



but should not include interpretive text—again, so that stakeholders can draw their own conclusions about which pieces of the story are most important in the data interpretation meeting. Figure 6.3 also illustrates the distinction between generic text for a data placemat (left) and interpretive text for a final report (right). Chart titles in data placemats should only indicate the corresponding survey question or data source. Once the evaluator listens to stakeholders' reflections during the data interpretation meeting, these stories and contextual details are added to the chart through titles, subtitles, and/or annotations and included in the final report.

We recommend grouping charts by evaluation question; that is, one placemat per evaluation question. Data interpretation meetings flow best with three to twelve total placemats. The final placemats are printed on 11-by-17-inch paper so that stakeholders have adequate space to sketch and take notes on the placemats.

**Step 1.3. Determine who should attend.** It is important to include people who are most involved with the program and have a stake in the evaluation. This includes line staff, supervisors, and may also include an involved board member. Based on the size of the program/initiative being evaluated, a data interpretation meeting could work well with as few as two or three participants and as many as six to eight participants. Additional factors to consider as you determine who to invite to the meeting include:

- 1) *Power dynamics.* Are there certain voices that carry more weight than others? Is there a dominant person in the room whose voice tends

to shape the conversation? Will the personality and position dynamics within the room yield to candid conversations? These considerations are described in the American Evaluation Association’s Cultural Competence Statement (Fairhaven, 2011) and Guiding Principles for Evaluators (American Evaluation Association, 2004).

- 2) *Willingness to share.* Are the people in the room ready to “roll up their sleeves” and have an open and honest conversation about the data and its implications? Will people feel comfortable talking about things that may not be working well?

Depending on the size of the group or the potential dynamics of the participants, it may be helpful to hold more than one data interpretation meeting. It is up to the evaluator, with guidance from the client, to determine what mix of individuals will yield fruitful conversations. It is important to take risks in terms of who to invite—playing it safe won’t allow for breakthrough moments.

**Step 1.4. Schedule meeting.** A data interpretation meeting typically lasts from one and one-half to three hours, depending on the number of placemats and participants. It is not recommended to go longer than three hours; this type of meeting requires a lot of mental energy, attention to detail, and discussion—all of which may decrease over the duration of the meeting. Typically, there’s more energy and enthusiasm when discussing the first few placemats, so it may be helpful to cover those placemats that would benefit the most from stakeholder perspectives toward the front end of the session.

While it is possible to conduct these meetings in an online setting, we recommend conducting these meetings in person. Drawing from our experience, we feel that in-person facilitation promotes more active engagement from participants and allows the facilitator to draw on his or her visual and auditory senses, both of which we feel are critical in effective facilitation.

**Step 1.5. Gather materials.** In preparation for this meeting, the evaluator should:

- Print a set of placemats for each participant. It is not recommended to share the placemats with stakeholders ahead of time, unless the meeting will be conducted in an online setting.
- Have access to additional data and charts if needed (e.g., laptop files, printed tables, or appendices). For example, if investigating program participation rates, you may choose to display participation rates on the placemat by geographic location. During the meeting, a stakeholder may wonder aloud if participation rates differed by gender. With access to the cleaned data file on a nearby laptop, the evaluator can perform a quick cross-tabulation by gender and share findings with stakeholders immediately.

- Come prepared with a list of themes, based on the evaluator’s initial interpretations.
- Bring highlighters and markers to encourage participants to scribble notes on the placemats during the meeting.
- Have access to a basic agenda—even if it’s just in your head. It is helpful to think about how many minutes you should allocate to each placemat to ensure that all of them get covered during the meeting.

**Phase 2. During the data interpretation meeting.** During the data interpretation meeting, the evaluator must play both a technical and adaptive role. Switching effectively between the two roles can be tricky and requires the ability to carefully balance both roles in an effort to empower stakeholders in the room to participate and take the collaborative conversation to the next level without dictating the end outcome of the meeting.

The evaluator will naturally read between the lines and form personal assessments of what the data are saying. These back-pocket explanations can be drawn on during the data interpretation meeting, but the evaluator must be open to amending—or altogether discarding—these personal hypotheses based on the stakeholders’ conversations during the data interpretation meeting. The evaluator must be willing to allow the conversation to unfold naturally while balancing traditional evaluation duties such as answering methodological questions and traditional meeting facilitation duties such as keeping the discussion on track and on time.

**Step 2.1. Explain the process.** The evaluator starts by explaining the purpose of the meeting: “To share some data points from the evaluation and discuss what these data points may mean given your role, knowledge, and experience with the program/initiative. Together, we want to develop a mutual understanding of the information that has been collected for this evaluation.”

**Step 2.2. Lead a discussion of each placemat.** The evaluator passes out hard copies of placemats one at a time; instructs the participants to skim each placemat; and encourages participants to underline, circle, and write down questions and comments. The evaluator guides group discussion by asking open-ended questions:

1. What do these data tell you?
2. What surprises you about these data?
3. What factors may explain some of the trends we are seeing?
4. Does this lead to any new questions?

The evaluator uses his or her adaptive capacities to modify the placemat structure and meeting format to a particular evaluation. Table 6.2 describes modifications based on the evaluation’s focus, length, and impetus. As noted in the final column, this process works best when the evaluation is driven by a desire to learn rather than the need to justify funding.

**Table 6.2. Adapting This Process for Different Evaluations**

<i>Impetus for Evaluation</i>	<i>Type of Evaluation</i>	<i>Structure of Placemats</i>	<i>Structure of Data Interpretation Meeting</i>	<i>Key Lessons/Insights</i>
10-year retrospective of leadership development program	Requested by program staff wanting to learn more about program. Results to be used to communicate with funders, but that was not the primary driver.	Eight evaluation questions and eight corresponding placemats. Contained quantitative survey data and qualitative interview data.	One 3-hour in-person meeting. Two evaluators and two program codirectors.	<ul style="list-style-type: none"> <li>• Codirectors were fully invested in the program and learning from the evaluation.</li> <li>• Codirectors were honest with each other.</li> <li>• Codirectors used this meeting as an opportunity to <i>learn</i> from the evaluation.</li> <li>• Codirectors walked away feeling empowered.</li> </ul>
Two-year international fellowship program	Program funding being cut; evaluation an opportunity to prove program worth to funders.	Three evaluation questions and three corresponding placemats. Placemats contained data from interviews and surveys.	One 3-hour in-person meeting. Two evaluators and two codirectors.	<ul style="list-style-type: none"> <li>• Data placemats showed both positive and negative data.</li> <li>• There were some instances in which stakeholders started casting blame for program shortcomings illustrated in placemats on others not present.</li> <li>• Evaluator had to carefully navigate to keep conversations focused on contextual factors rather than calling out individual people.</li> <li>• Evaluator had to facilitate the conversation to draw out the actual context behind the data trends; this was a challenge because stakeholders were more interested in shaping the story to attract more funders.</li> </ul>
10-year retrospective synthesis on advocacy and funding strategies related to human rights	Funder interested in compiling lessons to share with funders and advocates within the field.	One placemat, highlighting six themes. Placemats contained distillation of interview and survey themes.	Due to power dynamics of key stakeholders, evaluator conducted three data interpretation meetings to ensure different voices and perspectives had the chance to weigh in.	<ul style="list-style-type: none"> <li>• Each data interpretation meeting yielded different interpretations of the data.</li> <li>• Position within the field played a role in how stakeholders perceived and interpreted the data.</li> <li>• Evaluator was able to integrate multiple viewpoints and perspectives into the final report, adding an additional layer of complexity and nuance.</li> </ul>

**Phase 3. After the data interpretation meeting.** After the data interpretation meeting, the evaluator returns to his or her office to conduct additional analyses and prepare the final deliverable.

**Step 3.1. Conduct additional analyses as needed.** Data interpretation meetings uncover opportunities for additional analysis, because the meeting participants' reflections provide a clearer understanding of the program's or initiative's context. Following the meeting, the evaluator revisits existing data to conduct analyses such as:

- Disaggregating participant subgroups or program cohorts based on meeting participants' ideas about how and why results varied across groups;
- Calculating inferential statistics to understand where meeting participants' sense of *practical significance* aligns with areas of *statistical significance*; and
- Triangulating findings across multiple data sources and time periods (e.g., reexamining focus group transcripts in light of meeting participants' insights about key survey patterns).

Data interpretation meetings also uncover questions that can be addressed in future performance management and evaluation efforts.

**Step 3.2. Prepare the final deliverable.** We suggest outlining the final report or presentation within a few days of the data interpretation meeting when meeting participants' conversations are easier to recall. In preparing the final deliverable, the evaluator would modify the charts from the data placemats (e.g., through shading choices and interpretive text as shown in Figure 6.3); design new charts (e.g., based on the additional analyses conducted in Step 3.1); and include meeting participants' stories, anecdotes, and hypotheses as to how and why findings occurred. This facilitation process adds an additional layer of insight and interpretation to the final deliverable that—without a data interpretation meeting—would not have been available.

## Conclusion

In this chapter, we outlined a three-phase process for engaging stakeholders, building evaluation buy-in, and giving stakeholders space to think about and reflect upon findings. In Phase 1, the evaluator analyzes data and designs chart-based data placemats to display important patterns. In Phase 2, the evaluator facilitates a data interpretation meeting with program stakeholders. During the meeting, the evaluator asks stakeholders to interpret each of the charts and listens as stakeholders offer explanations for the results. In Phase 3, the evaluator conducts additional analyses and produces a final report or other deliverable.

The facilitation aspect of the data interpretation meeting is the hardest to gauge and prepare for ahead of time. Authenticity has helped us navigate

these interactions; being clear, open, and honest in communicating with stakeholders and identifying challenges goes a long way. In the example highlighted earlier in this chapter, we explained how “naming” the underlying tension within the room helped to lift the conversation to the next level. As a facilitator, it’s not only important to be able to recognize negative currents that may be preventing conversation from naturally unfolding, but it’s also important to be willing to take risks.

We have used this process in dozens of evaluation projects over the years. We continue to utilize this process because:

- The facilitator has an opportunity to create an environment where meeting participants can develop a shared understanding about the evaluation results, which increases both learning and buy-in;
- Insights gained from this process foster social equity, in which “those who give to the evaluation may benefit in return” (American Evaluation Association, 2004);
- Engaging those closest to the program or initiative ensures that findings are more valid and reflective of what is actually taking place than if the evaluator alone attempted to make meaning from the data, similar to *member check* techniques used in qualitative research;
- The data interpretation meeting itself is an opportunity to collect data—stakeholders share their reactions to the data, which allows the evaluator to present a well-rounded, comprehensive picture of the program or initiative in the final report; and
- When stakeholders participate in and better understand the information collected through an evaluation, the information is more likely to be used for program improvement.

## References

- American Evaluation Association. (2004). *Guiding principles for evaluators*. Retrieved from [www.eval.org](http://www.eval.org)
- American Evaluation Association. (2011). *Public statement on cultural competence in evaluation*. Fairhaven, MA: Author. Retrieved from [www.eval.org](http://www.eval.org)
- Cairo, A. (2013). *The functional art: An introduction to information graphics and visualization*. Berkeley, CA: New Riders.
- Coffman, J., & Reed, E. (2009). *Unique methods in advocacy evaluation*. Retrieved from [http://www.innonet.org/resources/files/Unique\\_Methods\\_Brief.pdf](http://www.innonet.org/resources/files/Unique_Methods_Brief.pdf)
- Cousins, J. B., & Chouinard, J. A. (2012). *Participatory evaluation up close: An integration of research-based knowledge*. Charlotte, NC: Information Age.
- Dean-Coffey, J. (2013). Graphic recording. In T. Azzam & S. Evergreen (Eds.), *Data Visualization, part 2. New Directions for Evaluation, 140*, 47–67.
- Evergreen, S., & Metzner, C. (2013). Design principles for data visualization in evaluation. In T. Azzam & S. Evergreen (Eds.), *Data visualization for evaluation, part 2. New Directions for Evaluation, 140*, 5–20.

*VEENA PANKAJ is Director at Innovation Network, Inc. She is a skilled evaluator and facilitator and has over a decade of experience leading organizations through measurement and design processes.*

*ANN K. EMERY is an independent evaluation consultant who specializes in data analysis and visualization.*