

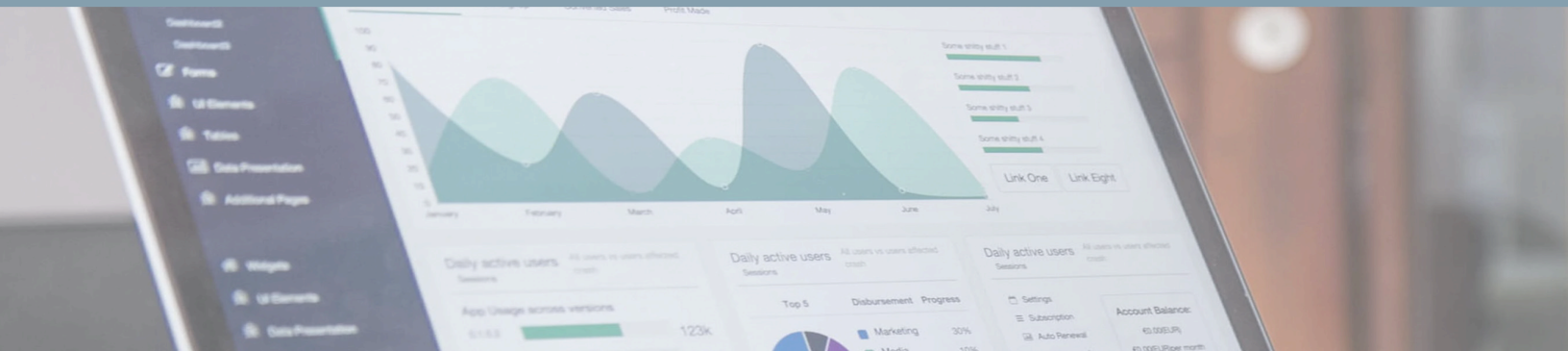
# Data Party Planning Guide

*engaging partners in evaluation* –  
a time-limited way of conducting  
participatory data interpretation

Developed by the Community and Stakeholder Engagement (CaSE) Program, with support from the Inclusive Science and Recruitment and Retention Programs at the North Carolina Translational and Clinical Sciences (NC TraCS) Institute – University of North Carolina at Chapel Hill.

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# Contents

<b>Introduction .....</b>	<b>3</b>
Why Engage Partners in Evaluation?	3
Who are Partners in Evaluation?	3
What is a Data Party?	3
<b>Planning Your Data Party .....</b>	<b>4</b>
General Planning Considerations	4
Data Party Activity Ideas	6
Discussion Questions	7
<b>Data Party Example .....</b>	<b>8</b>
Planning Logistics	8
Party Structure and Implementation	9
During the Data Party	10
After the Party: Follow-Up	12
Overall Reflections	12
<b>Works Cited .....</b>	<b>13</b>
<b>Appendices .....</b>	<b>14</b>
Appendix A: Data Party Agenda	15
Appendix B: Small Group Worksheet	16
Appendix C: Next Steps Suggestions Spreadsheet Template	17
Appendix D: Data Party Evaluation Survey Template	18

# Introduction

## Why Engage Partners in Evaluation?

Engaging partners in the evaluation process—namely, in the collection, analysis, and interpretation of data—can significantly enhance the appropriateness and acceptance of findings and recommendations.<sup>1,2</sup>

Through participatory evaluation processes and collaborative data interpretation, partners provide context and expertise that may otherwise be missing, resulting in analyses which more authentically capture the experiences under study.<sup>1,2</sup> Participatory processes additionally lead to community-building and a culture of collaboration among participating individuals.<sup>1,2</sup>

## Who are Partners in Evaluation?

Partners in evaluation are persons or groups who have an interest or concern in a project, activity, or course of action related to the evaluation. Data party participants can include internal partners like program staff as well as external partners like community members, program participants, local decision makers, funders, and more.

## What is a Data Party?

Given the often limited timeline and budget for program evaluation, a data party is a time-limited way of conducting participatory data interpretation.<sup>1,2</sup>

A data party is an hours-long event in which diverse partners review the data, discuss their interpretations, and inform final recommendations.<sup>3</sup> Data parties are also intended to be engaging, relationship-building events—involving food or fun icebreaker activities, for example.<sup>2,3</sup>



# Planning Your Data Party

Data parties can involve a variety of processes and activities, depending on the party's purpose, participants, project context, and data types.<sup>3</sup> This section provides an overview of general planning tips, activities, and potential discussion questions for your data party.

## General Planning Considerations

The points outlined below can be used as a foundation for thinking through the steps of planning a data party. Many points were drawn from the following sources: [EvalAcademy](#),<sup>1</sup> [Franz, 2013](#),<sup>2</sup> and [University of California 4-H \(UC 4-H\)](#)<sup>4</sup>

### a. Consult with potential participants about the party's theme and purpose

- Are they interested in participating in a data party?  
If so, what are they hoping to accomplish through the data party?
- Who else should be involved (program staff and/or participants, external community members, local decision makers, etc.)? Which individuals should be invited?
- What perspectives are missing from the party invitees or from the data itself?
- What data or questions do they want to discuss?

### b. Consult with potential participants about the party's logistics

- How long should the party be?
  - » A smaller project may require a 1-2 hour data party, while a project with a lot of data may need 3 hours or more
- Where should the party be held?
  - » Data parties can occur virtually (via video conferencing) or in-person, ideally at a location convenient for participants
- Should participants be compensated? If so, when and how should they be provided compensation?
- Do participants require introductions to each other and the project before data interpretation? If so, how will this be accomplished?
- What kind of food would be appropriate for the event? What food allergies or dietary restrictions need to be accommodated?

### c. Plan for accessibility

- Ensure that physical spaces are accessible to people with limited mobility access (e.g., space and bathrooms are accessible by wheelchair, seating is readily available, seating can accommodate people with large bodies).
- Communicate COVID-19 and other infectious disease prevention protocols. This can include sharing information about required or optional use of face masks, air filtration, outdoor seating availability, ability to maintain social distance from others, and expectations around staying home if sick.

- Ensure that virtual spaces offer closed captioning.
- Consider language needs to ensure all participants can fully engage in the event. This could include having interpreters or bilingual facilitators during the event, as well as offering materials translated into multiple languages.
- Communicate bathroom access. (Is there nearby bathroom access? Are family and/or gender-neutral bathrooms available?)
- Specify length and timing of breaks (recommended 10 minutes per hour at minimum).
- Specify what childcare options (including childcare stipends) are being offered.
- Share an agenda in advance.
- Proactively share this accessibility information, as well as a contact person for additional accessibility requests, in initial event communications (do not place burden on participants to guess/investigate access information).

#### **d. Consider what processes should be used to review the data during the data party**

- Who should lead the data party? Consider having co-facilitators who represent the partners invited, or a trained facilitator who is prepared to handle potentially sensitive data or topics or conflicting perspectives.
  - » For those planning an event on sensitive topics or involving potentially sensitive data, consider using an alternative term for your data party (e.g., “group data reflection” or “group data interpretation”).
- What data should be presented?
- Consider any regulatory requirements (particularly if the data was collected as part of an IRB-approved research study). Should your data be de-identified, particularly if participants were not members of the original research team?
- How can the findings be prepared in a way that participants can easily understand? Consider sharing data in engaging ways. Summary data (vs. raw data) may be more accessible to participants. For example, you can provide graphs, other figures, and/or qualitative data organized into preliminary categories.
- How much time do participants need to completely review and digest the data?
- What questions will be discussed at the data party, based on party objectives and interests identified with potential participants?
- What discussion techniques will be used to engage participants in reflecting on the data?
- What tools are needed to facilitate the data party? These may be based on the activity ideas for the data party; a few examples are provided below in section 2. Examples may include whiteboard, markers and highlighters, post-it notes, or tech/apps such as Miro, Mural, Jamboard, Google Drive or Zoom.

#### **e. Ensure participants are prepared for the data party beforehand**

- Send a summary of the data in advance so participants have the option to review before the event, especially if the party is virtual (participants will need to access the data themselves during the event).
- If there are many discussion questions, send them ahead of time so participants can form their thoughts in advance.

## f. Disseminate results and collect feedback after the data party

- At the end of the party and/or afterward, provide a summary of key points from the discussion and next steps.
- Collect participant feedback to gauge their satisfaction with the party, their experiences during the event, and the value and impact of the event.
  - » See Appendix D for a template feedback form

## Data Party Activity Ideas

As outlined above, a data party presents information in an engaging and accessible format for participants. The following activities are some ideas for how participants can interactively review and reflect on the data. Resources are linked below for further exploration of each activity.

### Gallery walk

Participants view posters of results and discuss them in small groups before larger discussion.<sup>3</sup>

- Can include a prompt (or prompts) at the bottom of the poster for small groups to discuss<sup>4</sup>
- Can provide post-it notes and/or pens for participants to add their thoughts, questions, and recommendations to the posters, then collect them all and see if there are any items the large group should discuss<sup>4</sup>
  - » For virtual data parties, can use Google Jamboard or other collaborative document platforms

### Data placemats

Each person receives key findings on a sheet (i.e. a “placemat”) with questions to probe for interpretations or general responses.<sup>3</sup>

- Can include prompt questions on the placemat<sup>4</sup>
- Can leave blank space for participants to take notes<sup>4</sup>
- Give everyone time to review the data and answer the prompts<sup>4</sup>



### World café

Participants rotate around separate states, each “hosted” by facilitators focusing on different aspects of the data<sup>3</sup>

- In a virtual setting, can use different breakout rooms

## Discussion Questions

Question types and examples you may want to consider when discussing the data are outlined below, drawn from various sources including: [EvalAcademy](#),<sup>1</sup> [Community Solutions](#),<sup>5</sup> and [Franz, 2013](#).<sup>2</sup>

### a. What is happening here?

- What story is this data telling you?
- What is the data telling you about (insert topic)?

### b. What are our reactions to the data?

- What was confirmed by the data that you already knew?
- How does the data align with your expectations? What might be an alternate explanation?
- What really stands out for you?
- What surprised you about the data?
- What is missing in the data that you thought you would see?

### c. How are we interpreting the data?

- Is there another way to analyze this data?
- Are there any biases at play here?

### d. What should we do next?

- What response do you think is required here?
- What actions would you take as a result of these findings?
- How viable are these recommendations? Which feel most doable?
- How might we best communicate these findings?

### e. What lingering questions and thoughts do we have?

- What are we still uncertain about?
- What would you be interested in exploring and/or discussing further?
- What other meanings do you see in the data that we haven't already discussed?
- What other comments do you have about the data?



# Data Party Example

The general planning tips, activities, and questions above were used to inform a data party held by the Community and Stakeholder Engagement (CaSE) program at the North Carolina Translational and Clinical Sciences (NC TraCS) Institute in November 2022.

## Purpose

CaSE sought to determine next steps for improving the program's Community Feedback Session (CFS) service.<sup>6</sup> CFSs provide support for researchers seeking partner input on a project's design, implementation, or dissemination.<sup>6</sup> Trained CaSE staff facilitate the sessions to draw out participant feedback.<sup>6</sup>

## Evaluation data

CFS participants and researchers receiving feedback were invited to complete a post-session evaluation survey, involving a mix of open-ended, Likert scale, and multiple-choice questions. Researchers are also invited to complete a three-month follow-up survey. This project was deemed Non-Human Subjects Research by the UNC-Chapel Hill Institutional Review Board, as its purpose was to evaluate the CFS program.

## Scope

This data party focused on reviewing participant evaluation data from CFSs related to two separate projects, as well as researcher evaluation data from CFSs related to those projects and two others.

## Planning Logistics

Party planning began approximately one month before the event took place. Two members of the CaSE team who were involved in evaluating the CFS program led the planning process.

## Data summaries

The CaSE team party organizers were responsible for compiling CFS survey responses into data summaries—with one report per project summarizing feedback from participants, and one report summarizing researcher feedback across all projects (3 reports total). The reports were 7-10 pages long, with the first few pages containing around two bar graphs per page, and the rest containing qualitative feedback organized into preliminary themes. All data was presented in de-identified form.



## Participants

The event organizers identified and recruited six other prospective participants, including other CFS facilitators and organizers, for a total of seven participants.

## Determining logistics with participants

To determine participant preferences for the party, the organizers sent a brief survey to assess whether the meeting should take place in-person or virtually, and if the former, where participants would prefer to meet. The organizers also sent a Doodle poll to determine availability, with plans for a 1-1.5 hour virtual meeting or a 2-2.5 hour in-person meeting including lunch. Potential in-person party locations were chosen based on geographic convenience and ability to eat lunch in an outdoor setting. Ultimately, participants were all available during one two-hour period, and responses indicated a preference for an in-person meeting at a local library.

## Summary of key personnel

Two event organizers who reviewed and summarized the data prior to the party, seven attendees, and one facilitator (in this case, the facilitator was also an organizer).

## Party Structure and Implementation

After multiple discussions between data party organizers and other team members, informed by the general planning tips in prior sections, the following structure was determined:

1. **30 minutes:** Lunch and attendee mingling (outdoor library space)
2. **30 minutes:** Introduction to activity and small groups review data summary reports
3. **15 minutes:** Reconvene and small groups share reflections from reports
4. **40 minutes:** Large group discussion
5. **5 minutes:** Wrap-up and evaluation survey completion

Prior to the event, organizers reached out to participants via email with the following information:

- Detailed agenda that reiterated the time and location
- Description of what data parties are and the purpose of this party
- Guiding questions to be discussed (see Appendix A)
- Data summary reports to be reviewed during the data party. Participants were also invited to review the reports beforehand, keeping the guiding questions in mind

## LESSONS LEARNED

Participants expressed **appreciation for the pre-party coordination and communication**, emphasizing the importance of preparing participants for the event.

One respondent suggested **planning for an hour-long lunch**, instead of half an hour. Given the hybrid nature of work during the COVID-19 pandemic, many participants had not seen each other for a while, so half an hour for lunch—the main socializing portion of the party—felt rushed as a result.

## During the Data Party

### Small Group Activity

After lunch, participants split into three small groups to each review different CFS evaluation summary reports. They were also provided with copies of the surveys that were sent to CFS participants and researchers. Each group was additionally provided worksheets listing the following discussion questions, which participants discussed before re-convening (see Appendix B):

1. What is the data telling you about the session(s)?
2. What stands out for you? Does anything surprise you?
3. How can this feedback inform future sessions?
4. How can we improve the evaluation process/survey?

### LESSONS LEARNED

Multiple participants highlighted the **small group activity as something that went well**. One participant said, *“breaking out in small groups and focusing on feedback from a session or participant group worked out really well. I enjoyed hearing everyone’s perspective on the feedback as well as suggestions for improvement.”*

Participants needed **more time to review the evaluation reports** and discuss guiding questions in their small groups.

Participants also needed **more than 15 minutes to share their thoughts with the large group**, as their reflection topics blended in with large group discussion questions, eliciting thoughts and responses from others.

Participants were invited to take notes on their discussions using the provided worksheet to prepare for sharing their reflections with the larger group.

To accommodate a mix of participant preferences for hard copy and digital methods of working, organizers brought physical copies of the evaluation reports, accompanying surveys, and small group worksheets, in addition to sending electronic versions of the materials beforehand. Digital versions of these materials were saved in a shared file system, organized into subfolders which contained all the materials each group needed during the activity.



## Large Group Discussion

After the activity, participants reconvened to share their thoughts with the whole group. Each small group summarized the following:

- What the data in the report told them about the session and their key takeaways (i.e., question 1 above)
- What in the report stood out for them (i.e., question 2 above)
- Any other information they wanted to share

Participants in other groups had the opportunity to briefly respond or ask clarifying questions in response to each small group. Afterwards, participants engaged in a facilitated large group discussion loosely based around the following prompts:

1. What themes are you noticing across reports?  
(Focusing on key takeaways)
2. How can this feedback inform future CFSs?
  - a. What changes do we want to make?
  - b. What are our next steps?
3. How can we improve the CFS evaluation process?
  - a. Whose voices are missing?
  - b. What information is missing?

The first planned prompt involved a general group discussion. The second and third planned prompts were discussed using a large group activity. Using post-it notes, participants wrote their thoughts on how the feedback in the reports could inform future CFSs (how the feedback can be used to improve the CFS process), with one idea per post-it note.

**Tip:** to conduct this activity virtually, organizers can use a [Google Jamboard](#), a “digital whiteboard that lets you collaborate in real time.”<sup>7</sup> Collaborators can write, draw, insert images, or type ideas onto virtual post-it notes, which can be moved around.

The data party organizers then read each note out loud and grouped similar ideas onto a large piece of blank poster paper. Each group of post-its was then given a category name.

## LESSONS LEARNED

Multiple participants expressed **appreciation for the opportunity to review the evaluation materials collectively**; one respondent shared, “*It was great to get everyone together to review the materials at the same time and debrief about it.*” Participants felt the “*conversation was helpful,*” resulting in “*concrete suggestions for moving forward*” and “*gaining group consensus on ways to improve processes.*”

One participant suggested: “*It might’ve been nice to have the researcher feedback and the participant/community feedback either be two separate parties, or where everyone got to see/ review both sides of the coin. I found myself wanting to switch groups or see the other side, too!*” The participant’s suggestion could additionally point to the need for either a **longer data party**—giving each small group time to rotate through all three reports— or **deeper consideration of how the data was presented**. This feedback additionally highlights the importance of considering what data should be included and how it should be presented, providing enough time to review and digest information, and determining the type of activity used for reviewing the data.

## After the Party: Follow-Up

### LESSONS LEARNED

In response to how future parties could be improved, **participants' main feedback was to extend the length of the event.** One participant said, *"It'd be nice for us to have been able to brainstorm further and come up with actionable steps leaving the party, too[...]"*

Participants stayed approximately 30 minutes past the scheduled end time, and even then, next steps were determined asynchronously, via the CFS suggestions spreadsheet. One key lesson learned was to **allocate more time for each section and the party as a whole**; future in-person data parties of this scope should **ideally aim to take three hours or more.**

The data party concluded with the large group activity described above. Party organizers saved the sheet of paper with post-it notes, and after the party, each idea was compiled in a collaborative suggestions Excel spreadsheet (see Appendix C).

After the data party, organizers reached out to data party participants with a brief thank you, the link to an anonymous 5-minute evaluation survey (see Appendix D), and the link to the suggestions Excel spreadsheet. Participants were asked to help fill in the spreadsheet and volunteer for implementing suggestions.

## Overall Reflections

Based on informal feedback and survey results, participants enjoyed the party and found it to be engaging—one participant described the data party as *"fun,"* and another *"loved the social aspect of it, too."* The data party also resulted in productive conversation around evaluation feedback and processes.

This method of participatory data interpretation worked well for the CaSE team, who expressed interest in holding similar events in future. Data parties can be adapted to a variety of other projects and contexts as well, using a mix of discussion questions and potential activities. This guide, and lessons learned from CaSE's first data party, can serve as a starting point for those interested in planning their own event for participatory data interpretation.

### ***Acknowledgments***

This guide was written by Chloe Yang with feedback and contributions from Alicia Bilheimer, Summer Choudhury, Nisha Datta, Simone Frank, MaryBeth Grewe, Guadalupe C. Hernandez, and J. Tommy White.

# Works Cited

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# APPENDICES



**COMMUNITY  
FEEDBACK SESSION**

**EVALUATION  
DATA PARTY**

**WHAT IS A DATA PARTY?**

- Participatory data analysis
- Gathering to review community feedback session evaluation survey reports, collectively interpret the data, and discuss next steps for improving the sessions

**GUIDING QUESTIONS**

You will have some time to read each report during the session, but if you'd like to review them in advance, please keep the following discussion questions in mind:

- What is the data telling you about the session(s)?
- What stands out for you? Does anything surprise you?
- What themes are you noticing across reports?
- How can this feedback inform future sessions?
  - What changes do we want to make?
  - What are our next steps?
- How can we improve the evaluation process?
  - Whose voices are missing?
  - What information is missing?

**FRIDAY,  
NOVEMBER 4, 2022**  
12:00 - 2:00 PM

**CHAPEL HILL  
PUBLIC LIBRARY**  
Meeting room D

**AGENDA**

12:00 - 12:30 PM  
Lunch (outdoor library space)

12:30 - 1:00 PM  
Introduction to activity and small groups review reports

1:00 - 1:15 PM  
Re-convene and small groups share out

1:15 - 2:00 PM  
Large group discussion

NOTE: This agenda document was provided in PDF form as an email attachment.

## Appendix B: Small Group Worksheet

### EVALUATION DATA PARTY SMALL GROUP DISCUSSION TEMPLATE

Report discussed: \_\_\_\_\_

In your small group, please review the data summary report, then discuss the following questions. You will share your answers with the whole group when we reconvene. Please take notes below and be prepared to summarize the report and your thoughts for the group.

***What is the data telling you about [focus/scope of report]?***

***What stands out for you? Does anything surprise you?***

***How can we use this feedback to improve [program, etc.]?***

***How can we improve the evaluation process?***



## Appendix C: Next Steps Suggestions Spreadsheet Template

The following table is a template version of the collaborative next steps suggestions spreadsheet disseminated after CaSE’s data party. The spreadsheet contained columns for the following: each suggestion, the overarching category each idea belonged to, the person/people responsible for enacting the suggestion, immediate next steps, and additional comments or notes. The spreadsheet also contained two empty columns for individuals to “vote” on the suggestion’s timeframe—i.e., whether the suggested improvement was an immediate or long-term goal.

Participants were asked to add any thoughts to the “Comments/notes” column, add their name to the “Person/people responsible” column if they were willing to take on the corresponding suggestion, and add their initials under the timeframe column (“Immediate” or “Long-term”) that they felt applied to the corresponding suggestion.

Category	Suggestion	Person/people responsible	Next steps to address	Votes for timeframe: immediate	Votes for timeframe: long-term goal	Comments/notes



