Engaging Stakeholders in Making Sense of System Scan Data

The following guide brings you through the process of involving stakeholders in making sense of the system scan data. Included are the following sections:

- **Part 1: Preparing for Sense-Making Meeting (p 1-4)**
  This step involves preparing your typed up system scan data for the sense-making process.

- **Part 2: Facilitating Sense-Making Meeting (p 5-6)**
  This initial meeting teaches stakeholders how to theme qualitative data, and then involves them in practicing these skills to make sense of the system scan data. This meeting results in an initial set of “Headline” and “Mega-Headline” themes for the system scan data. If you plan to engage stakeholders in making sense of all system scan data collected (e.g., the “Cadillac” option), sections of this meeting can be repeated at future meetings.

 PART 1: PREPARING FOR SENSE-MAKING MEETING

1. **Type up and clean your system scan data** using the “Preparing Data for Sense-Making” templates found on the ABLe Change website.

2. **Decide who you want to engage in the sense-making process**

   Consider stakeholders who...
   
   - Engaged in the scan. This not only deepens the engagement of these individuals, but also provides key insights needed to interpret the system data.
   - Will be engaged in ongoing efforts and need buy-in around the process.
   - Represent diverse community perspectives (e.g., experiencing the problem, providing services, supporting at the local level, making decisions).

Who will you engage in the sense-making process?
3. Decide what data stakeholders should sort. Consider which sense-making model is right for your context:

<table>
<thead>
<tr>
<th>□ The “Cadillac”</th>
<th>□ The “Mid-Range”</th>
<th>□ The “Ultra-Efficiency”</th>
</tr>
</thead>
<tbody>
<tr>
<td>EVERYONE engages in creating Headlines and Mega-Headlines for ALL of the data.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRO: Builds stakeholder buy-in and awareness of the system</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CON: Can take a long time (several meetings) and people can start getting burned out if there’s a lot of data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stakeholders engage in creating Headlines for some of the data – support team themes rest of data behind the scenes and engages stakeholders in validating themes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRO: Stakeholders get experience theming data, but in much less time; still builds stakeholder buy-in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CON: Sense-making process is not totally driven by community</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support team themes all of the data into Headlines and Mega-Headlines. Engages stakeholders in providing feedback only.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRO: Extremely efficient – takes the least amount of time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CON: Creates limited buy-in, could result in some stakeholders questioning process</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Determine how to engage your participants in sense-making

- **Select the type of sense-making meetings.** The sense-making process can take place over one or more large group sessions, or over a series of small group sessions. The first key decision you have to make is how you would like to plan these sense-making meetings.
  
  - **Large group meetings.** Some communities hold a few large meetings where they invite many different types of individuals to come and participate in sense-making at one time. This is particularly useful when there are existing large group meetings already happening in the community, such as regularly occurring collaborative meetings.
  
  - **Series of small group meetings.** In some cases, there may not be regularly scheduled large group meetings that you can leverage for this process. Or, there may be key perspectives that aren’t able to attend a regularly scheduled large meeting (e.g., many families are unable to attend meetings during the day). In these cases, communities can hold a series of small meetings to engage participants in the sense-making process.
  
  - **Combination of large and small meetings.** In some situations, it makes sense to hold both a large meeting and a series of small meetings to ensure all prioritized perspectives have the chance to engage in this process.

| What type of meeting will you use for your sense-making process? | What existing meetings or gatherings can you leverage? |
• **Select small group structure.** Whether you are using a large group meeting or a series of small group meetings, the sense-making process involves splitting up participants into small groups of 5-7 individuals to work on theming and sorting the system scan data. The next decision to make is how to organize your participants in these small groups.

  o **Affinity Groups.** One option is to organize participants by affinity group. For example, each organization has its own table, stakeholders from the same sector are grouped together (e.g., all health providers at one table, education providers at another table), or stakeholders are grouped together by role (e.g., all leaders at a table, all staff at another table, etc.). This organization is particularly useful when there are power dynamics at play within your group.

  o **Mixed Groups.** Another option is to mix up stakeholders at different small group tables. The benefit with this model is that it allows participants to integrate different perspectives during the initial sorting process. However, the diversity of perspectives can become distracting if participants are using specific terms or jargon. Again, take into consideration any power dynamics that could be at play within mixed groups, as this also can serve to shut down conversation.

<table>
<thead>
<tr>
<th>Are there any potential power dynamics that could come into play in your local context?</th>
<th>Given this, how will you organize your small groups – affinity or mixed?</th>
</tr>
</thead>
</table>

5. **Create Data Slips and Envelopes**

• **Count number of small groups.** Think about how many participants will be attending your sense-making meeting. Split theses participants into small groups of no more than 5-7 individuals each. How many small groups will be formed?

  Estimated # of Small Groups: ______________________

• **Decide what data to give small groups.** The next decision is what system information each of the small groups should receive. This decision depends on how much system information you have collected.

  o **For small amount of system data:** If your system scan includes no more than 35-40 data bullet points in total, one option is for each small group to look over the full set of system scan information.

  o **For large amount of system data:** If your system scan has produced a large amount of data (more than 40 total data bullet points), another option is to only give the small groups sub-sets of data to theme (e.g., 35-40 data points for each small group). For example, you could create these sub-sets of data for each small group by randomly selecting data bullet points across perspectives and system characteristics. You could pick data points within one system condition area (e.g., general conditions, access, coordination, quality, etc.) or across multiple system condition areas.
- **Create Data Slips.** The next step is to prepare the data to give out to each small group. Refer to the data you have typed up and cleaned in your “Preparing Data for Sense-Making” templates.

  - **Print out data slips.** Print out the data pages for each perspective group in your “Preparing Data for Sense-Making” templates on pieces of color paper indicated at the top of the page.
  
  - **Identify which data points your first small group will be sorting.** Identify which data bullet points from these pages (either all the data points or a subset of the data points – see “Decide what data to give small groups” step above) you will give to your first small group.
  
  - **Cut out data slips.** Cut out these data bullet points on separate slips of paper (do not cut out the questions listed in the templates – just the bullet points). See below how data bullet points from the three different perspective groups could be cut out into different slips of colored paper:

    MINDSET: Many teachers have the mindset of “My way is best, I have 20 years’ experience teaching preschool, I’m not comfortable changing the way I teach.” This makes them resistant to adopt more effective teaching practices.

    POWER: People in a position of power make decisions about how programs are designed or what services get funded because they think they know what’s good for families who don’t have resources. But they don’t know. It means services get designed or funded that don’t meet families’ needs.

    MINDSET: As a community, we haven’t agreed upon a common definition or set of indicators that tell us if children are prepared for school, which makes it hard to have aligned preschool instruction and quality standards.

  
  - **Create Envelopes.** Put all the data slips assigned to your first small group in an envelope. Label the envelope with the small group’s name or number.

  - **Repeat this process for all your small groups.**
PART 2: FACILITATING THE SENSE-MAKING MEETING – EXAMPLE AGENDA

ROOM SET UP
- ROUND TABLES WITH 6-8 CHAIRS PER TABLE

MATERIALS
- Markers for flip chart
- Candy for each table with 3x4 inch sheets of paper for creating headlines and mega-headlines
- Data sheets cut up for each table to work with
- 20 Quarter sheets of paper per small group for creating headlines (and mega-headlines)
- Paper clips to organize sorted data after meeting

WELCOME AND OVERVIEW (5 MINUTES)
- Facilitator welcomes everyone to the meeting and thanks them for coming.
- S/he notes that the purpose of the meeting is to dive deeper into the system scan data and begin to identify some core areas to prioritize in our work moving forward.
  - Remind them that we did the system scan process to understand local conditions in our community that contribute to our targeted problem. Describe who we have data from so far.
  - Today’s Meeting. Today’s meeting is the next step in making sense of the data we collected in the system scan. We will look through SOME of the data today to identify themes. Goal of meeting today is not to develop specific strategies and action but to look at what we have learned so far, see what else we need to learn, and identify potential priorities for change.

CANDY STORE GAME WARM UP (15-20 minutes, depending on if you do the optional reflection questions)
Adapted from Preskill and Russ-Eft (2005)
- Facilitator reviews intro exercise process
  - This scan generated LOTS of great data. So, what do you do with that much great information?
  - We are going to do a warm up exercise to get you ready to play with the system scan data we collected.
- Facilitate game using instructions below

➤ SORTING ROUND 1 (8 MINUTES): Have participants sit at their various group tables. Each team will receive a bag of various types of candy and have the task of sorting the pieces into piles.
  - “Imagine that you are new candy store owners and you need to organize this candy for your customers. Your store is opening in five minutes. You have 6 shelves to display your candy. Organize the candy into 6 piles that makes sense to you. Once you have sorted the candy into piles, give each pile a label using the index cards on your table so the customer knows what’s on your candy shelves (remember, kids are short 😊). We are going to call these labels ‘headlines’. Try to make the Headlines no more than 5-8 words each.
  - Alright – you have 5 minutes to sort your candy – go!”

➤ SORTING, ROUND 2 (5 MINUTES): Next, the facilitator says to the group:
  - “There has been an accident and you have lost some shelf space in your store and can now only have three piles of candy. Work together to reorganize your candy into three piles in a way that makes sense to you. Give each of these piles a new label using an index card. ”

OPTIONAL REFLECTION QUESTIONS (5 MINUTES): Have the large group discuss the following questions.
  - What rules did you use to initially sort the candy into the 6 shelves?
  - How did your group decide to reorganize the candy after the shelves broke?
  - Are there other ways you could have organized the candy?
  - What are some of the benefits of creating fewer piles?
LINKING TO QUALITATIVE ANALYSIS (2 MINUTES): To help participants see the link between this game and the sense-making process, say something like the following:

- Congrats – you have just learned the same process we will be using to make sense of our system scan data. In sense-making, you sort information into similar groups and provide those groups with a title – which we call a Headline. You can then sort these groups into smaller, similar piles – so when you communicate to others – you only have a few ideas or themes that you need to share.
- Next we’re going to have the opportunity to sort or theme the system scan data we collected – this theming will help us identify some target areas to prioritize in our work moving forward.

SORTING SYSTEM SCAN DATA: HEADLINES (25 MINUTES depending on how much data each group gets)

- Facilitator reviews sense-making process:
  - describe process and provide examples to build group’s capacity to effectively sort the system scan data and create headlines – refer to the example PowerPoint slides on ABLe website as a guide
- Facilitator gives instructions for theming:
  - Each table is going to be given a set of system scan data. When you get your envelope, open it up and start grouping similar data slips together, just like you did in the candy sorting game.
  - When you have created a group of similar data slips, give the group a name or “Headline” just like you did in the candy sorting game.
  - Repeat this process for each of the system characteristics.
- Facilitators help the group look at the data and sort it just like they did in the candy sorting game
- When the groups are finished, have them paper clip the data strips to their corresponding Headlines.

NOTE: THIS NEXT SECTION CAN BE DONE BEHIND THE SCENES AFTER THE MEETING INSTEAD TO SAVE TIME

SORTING SYSTEM SCAN DATA: MEGA-HEADLINES (20-25 MINUTES depending on how much data was sorted)

- Facilitator reviews theming process: Remember the 2nd round of the candy sorting game. We sorted our initial piles of candy into bigger buckets. We can use the same process with our Headlines.
- Participants bring their Headlines with the data strips paper-clipped underneath to an open space in the room.
  - One table shares each of their Headlines with the large group and lays them on the floor so everyone can see them. Ask if any other table has similar Headlines. If so, have the group look at this data and create an integrated Headline on a new label and put all the corresponding data strips underneath.
  - Next, ask if another small group has a different Headline other than what has already been shared, and have them put these Headlines on the floor. Use the same process described above to continue integrating all of the Headlines in the room, until all Headlines have been shared.
- Then ask participants to look across the Headlines and group any together that are related to an overall “Mega-Headline” system issue – just like they did in the candy sorting game. Have the group move related Headlines together and create Mega-Headline labels on half sheets of paper to summarize them.
  - Note: these Mega-Headlines are often very similar to the system condition areas you used to select your system scan questions, however there can be new types of Mega-Headlines that emerge depending on the data you collected. It can often be helpful to give some examples of Mega-Headlines during this labeling process.
- When the group is finished sorting, paper clip the Headlines to their corresponding Mega-Headlines.

WRAP UP AND CLOSING

- As a large group, ask people what insights they gained from this process.
- Ask if there are any additional questions we should ask other perspectives based on the data so far?
- Let everyone know the facilitators will take the themes developed today and integrate them into a summary that will be shared at the next meeting.

These materials are copyright by Michigan State University. You may not distribute, copy or otherwise reproduce any portion of these materials without permission. For more information visit ablechange.msu.edu