Strategies in Participatory Data Analysis: Tools for Hosting Data Dialogue Sessions to Engage Community Members in Generating Evaluation Findings

What is the purpose of this document?

Evaluating Ryan White HIV/AIDS Program (RWHAP) interventions is a complex process that involves the time, effort, and labor of not just evaluators, but also practitioners, program staff, and community members. Too often, analysis and interpretation of evaluation data exclude the on-the-ground staff from contributing to the final lessons learned within a program evaluation. However, using participatory approaches to analysis, like hosting a *data dialogue session*, can ensure that the real-world experiences of those implementing a RWHAP intervention are reflected in the final evaluation lessons learned and provide valuable context to the evaluation data.

This toolkit is designed as a flexible evaluation support resource to assist evaluators, HAB staff, and capacity building providers in planning and facilitating data dialogue sessions as part of an evaluation process. While the examples in this toolkit draw from a recent initiative, the approaches are broadly applicable across HAB-funded evaluations and are not limited to aging-related interventions. Use of this toolkit is optional and intended to complement existing input mechanisms, such as Community Advisory Boards.

What are *Participatory Analysis* and *Data Dialogue Sessions*?

Participatory analysis originates from the method of community-based participatory research[1] This approach emphasizes that *community members,* not researchers, are the true experts in the topics and programs that researchers and evaluators investigate. Thus, it is incumbent on researchers and evaluators to think strategically about how, when, and to what level bring community members into the research and evaluation cycle to best and most effectively incorporate their expertise.[3]

Participatory analysis is a set of techniques to engage key partners (e.g., community members, practitioners, program staff) in the data analysis stage of the research and evaluation cycle. Participatory analysis strives to create balance among researchers, practitioners, and community members to ensure all voices carry equal weight in the work of making sense of research or evaluation findings. By working to give all these voices equal weight, participatory analysis ensures that the voices of those closest to the programs or phenomena under study contribute to the final understanding of the data.[1] In the context of evaluations of interventions, participatory analysis ensures interpretations of evaluation data reflect the realities of those most affected by HIV and the health care systems designed to support them.

A *data dialogue session* is a form of participatory data analysis where different interest holders from an evaluation come together in real time, either in person or virtually, to collectively explore, analyze, and interpret data.[4] Evaluators prepare by making data accessible to key partners through data visualization, storytelling, or other activities that translate data points into digestible formats. During the data dialogue sessions themselves, evaluators take off the hat of “expert” and put on the hat of “facilitator”—working to engage key partners in an interactive conversation, guiding them through a review and reflection on key study findings, and eliciting insights on what data points mean in the context of the on-the-ground experiences of the group. Data dialogue sessions have been used successfully in research and evaluation across a variety of topics, such as making sense of surveys of community wellbeing,[5] determining takeaways of an evaluation of 4-H programs,[6] and implementation science evaluations of RWHAP programming for populations disproportionately impacted by HIV.[7]

By inviting a range of interest holders into the data analytic process, evaluators ensure that findings are practical and relevant to the practitioners and communities involved in the evaluation initiative. Evaluators who forego data dialogue sessions could miss an opportunity to collect information about the real-world conditions in which programs were implemented. Furthermore, data dialogue sessions strengthen relationships between evaluators and partners by providing a mechanism for ensuring that partners remain engaged in evaluation activities beyond data collection. They make certain that partners recognize their input in final decision-making and communications derived from evaluation efforts.

Although data dialogue sessions involve intentional planning, they are not resource intensive. The content of these sessions is drawn from analyses and materials already generated through routine evaluation activities, with minimal additional preparation required. Importantly, engaging partners early to validate interpretation and add contextual meaning can streamline later stages of the evaluation by reducing misinterpretation, accelerating consensus, and decreasing the volume of revisions needed during final review and dissemination.

How were data dialogue sessions used in the Emerging Strategies to Improve Health Outcomes for People Aging with HIV Initiative?

In the final year of the RWHAP Special Projects of National Significance (SPNS) *Emerging Strategies to Improve Health Outcomes for People Aging with HIV Initiative*, NORC hosted a series of data dialogue sessions with the 10 demonstration sites to present key data points from the multi-site evaluation and co-interpret these findings alongside providers and program staff. These data dialogue sessions enabled a much-enriched understanding of the key facilitators and barriers affecting program implementation, as well as critical context behind the client outcome data. Further, sites reported that they highly valued the data dialogue sessions as important opportunities to contextualize their data and foster bidirectional learning across program staff and evaluators. Together, NORC and the demonstration sites used this participatory process to distill down the key messages from this initiative for use in ongoing dissemination efforts.

What is included in this resource?

- **Section A.** Data Dialogue Session Planning Timeline
- **Section B.** Data Synthesizer Template
- **Section C.** Data Placemat Template
- **Section D.** Agenda Template
- **Section E.** Notetaking Template
- **Section F.** References

Section A. Timeline to Plan and Prepare for a Data Dialogue Session

A successful data dialogue session requires thoughtful coordination of topics, partners, venue, and general atmosphere in advance. Here we provide an eight-week planning timeline with key milestones for the successful preparation of your data dialogue session.

8 Weeks until Data Dialogue Session – Initial Planning & Goal Setting

- Define the purpose and objectives of the data dialogue session.
- Identify key data sources for co-interpretation.
- Create an attendance list by identifying partners, staff, and community members whose input is needed.
- Decide on in-person, virtual, or hybrid format. In-person sessions hold the greatest potential for relationship building and are ideal for this participatory approach. Virtual and hybrid formats help reduce travel costs but may need more intentional engagement practices.
- Draft a preliminary budget.

6 Weeks until Data Dialogue Session – Secure Venue & Logistics

- Identify a point of contact for day-of coordination.
- Consider accessibility needs (e.g., mobility, language interpretation, live captioning).

If in-person…

- Reserve meeting space with appropriate capacity and accessibility.
- Arrange for AV equipment, Wi-Fi, and seating layout.
- Plan for transportation and parking (e.g., directions, passes).

If virtual…

- Set up the virtual meeting room with appropriate settings (e.g., waiting room, screen sharing permissions).
- Create a backup plan for tech issues (e.g., alternate links, phone dial-in).

5 Weeks until Data Dialogue Session – Synthesize Data & Outline Key Findings

- Synthesize data by evaluation question.
- Identify key findings that warrant a deeper dive with participants.
- Decide on relevant participatory methods[8] for co-analysis at the data dialogue session.

4 Weeks until Data Dialogue Session – Develop Agenda & Materials

- Draft a detailed agenda with session topics and time blocks.
- Design interactive activities, such as mapping concepts, rating or ranking observations, or creating slogans to describe the program and its results.
- Prepare data visualizations and handouts.

- Assign facilitators and presenters for each session.

3 Weeks until Data Dialogue Session – Send Invitations & Confirm Attendees

- Send draft agenda to attendees to solicit input on content and invite opportunity to add additional topics of interest for the discussion.
- Send calendar invites with RSVP links.
- Include event details: date, time, location, parking, and contact info.
- Follow up with non-respondents.
- Confirm attendance, accessibility needs, and*, if in-person,* dietary restrictions.

2 Weeks until Data Dialogue Session – Coordinate Accessibility & Food

- Confirm accessibility accommodations (e.g., interpreters, large print, live captioning, mobility)

If in-person…

- Order name tags, signage, and printed materials.
- Identify a funding source for food, if offering. (Note: Food is not an allowable cost with Ryan White funding. Please refer questions to your project officer.)
- Select a catering vendor and finalize the menu.
- Ensure options for dietary restrictions (e.g., vegetarian, gluten-free).

1 Week until Data Dialogue Session – Finalize Presentations & Handouts

- Review and finalize all presentation slides and materials.
- Ready agendas, evaluation forms, and discussion guides—print copies for in-person events, web forms for online.

If in-person…

- Confirm delivery of food and supplies.

2 Days until Data Dialogue Session – Conduct Tech Check & Dry Run

- Test A/V equipment, Zoom links, and presentation transitions.
- Walk through the agenda with facilitators.
- Confirm arrival times and roles for all staff.

Data Dialogue Session Day! – Host the Data Dialogue Session!

- Arrive early to set up space (*in-person* or *virtual*) and test equipment.
- Greet participants and manage check-in.
- Facilitate sessions and document feedback.
- Debrief with team after the event.

Post Data Dialogue Session – Consolidate the Findings

- Collate all notes from data dialogue session into a central document to share back with participants.
- Use rapid thematic analysis[9] to identify key themes from data dialogue session to weave into final reports.

- Identify user-friendly formats for circulating the findings back to key partners, including implementation sites, funders, community members, and other interested parties.
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Section B. Template for Evaluators to Identify Key Data Points for Discussion in Advance of Data Dialogue Session

As part of getting organized for a data dialogue session, the evaluation team must do a preliminary set of analyses to prepare to steward the participatory process with the data dialogue session attendees. The aim of this preliminary analysis is to organize the data in such a way as to be able to identify cross-cutting themes and salient data points to bring to the data dialogue session attendees to contextualize through evaluator-guided activities.

Evaluation data come in all shapes and sizes, ranging from structured quantitative surveys to rich, narrative-based qualitative interviews. As a result, the data generated from these efforts can be equally varied, complex, and nuanced. Preparing for a data dialogue session requires thoughtful consideration of how to *triangulate data from multiple sources into digestible, engaging formats* that invite meaningful participation from stakeholders.

This *Data Synthesizer Template* is a rapid analysis tool designed to help evaluators quickly organize, interpret, and prepare mixed-methods data for participatory analysis. Whether working with survey metrics, interview themes, or site-specific implementation notes, this template supports evaluators in:

- **Creating an inventory** of key evaluation data sources.
- **Aligning each evaluation question** with supporting data.
- **Identifying key findings** across data types and time points.
- **Highlighting surprises, outliers, and patterns** that merit discussion.
- **Curating insights** that are relevant and actionable for data dialogue session participants.

This tool is especially useful when working with **combined datasets**, that include:

- Quantitative metrics (e.g., viral suppression rates, care satisfaction scores).
- Qualitative themes (e.g., barriers to implementation, client engagement strategies).
- Site-level synthesis across multiple timepoints.

By using the Data Synthesizer Template, evaluators can *bridge the gap between raw data and participatory analysis*, ensuring that the voices of those closest to the work can engage with the findings in a meaningful way.

Step 1: Inventory Evaluation Data Sources

Beginning with a comprehensive overview of the scope of evaluation, data sources can help organize and create boundaries about what data are and are not relevant to the data dialogue session.

The table below offers a structure for itemizing out and describing the data sources used in an evaluation.

Data Source	**Description**	**Collection Method**	**Timepoints**	**Notes**
Ex. Client survey	*Survey of client's care experiences and psychosocial health*	*Web*	*Baseline, 6 months, 12 months*	*Contains 15 core questions and up to 5 site-specific questions.*

Step 2: Crosswalk Evaluation Questions with Data Sources

In multimodal data collection, not every data source necessarily addresses each question asked. A clear crosswalk of each evaluation question, the data sources that enable the evaluator to answer that question, and the specific analyses being done to support answering that question can help researchers get a full picture of what aspects of the data to raise in relation to specific evaluation questions in the data dialogue session.

The table below provides a template that can be used to enumerate each evaluation question (EQ) of an initiative and crosswalk corresponding data source(s), data type, data aims, and analytic approach.

Evaluation Question (EQ): *Ex. What contextual factors influence implementation?*				
Evaluation Question (EQ)	**Data Source**	**Data Type/ Mode**	**Data Aims**	**Analytic Approach**
Ex. What contextual factors influence implementation?	*Provider Survey*	*Quantitative, online questionnaire*	*Evaluate change in provider attitudes and beliefs over time.*	*Linear Mixed-Effect Model*
	Key Informant Interviews	*Qualitative, in-depth interviews*	*Assess administrative support for intervention*	*Thematic Analysis*
EQ 1.				
EQ 2.				
EQ 3.				

Step 3: Data Synthesis by Evaluation Question

Once you have a clear understanding of your data and how they align with specific evaluation questions, the next step is to map out the key findings across the data sources within each evaluation question, and if conducting a multi-site evaluation, for each intervention site.

The table below offers a template for providing summaries of findings from each data source for each evaluation question. For multi-site data, each intervention site should have its own row.

Evaluation Question	Intervention Site	Data Source 2	Data Source 3	Data Source [...]
Ex. What contextual factors influence implementation?	*Ex. Philadelphia*	*Provider Survey: Mean PHQ-2 Score at Baseline:* *Mean PHQ-2 Score at 6 months:* *Mean PHQ-2 Score at 12 months:*	*Key Informant Interviews: Hospital administrators expressed satisfaction with grant funding and the ability to grow partner referral networks.*	*[...]*
EQ1.				
EQ2.				
EQ3.				

Step 4: Noting Key Findings by Evaluation Question

While step 3 provides a template for outlining the objective data points from each of the data sources, step 4 asks evaluators to begin their own interpretation of the emergent findings. This cursory interpretation will help to inform the discussion at the data dialogue session and may be useful for making decisions about what types of participatory engagement will support data dialogue session attendees in thinking through the data.

The table below can be used to key findings, surprises, highlights, and outliers for each evaluation question.

Evaluation Question	Key Findings	Surprises	Outliers	Cross-Timepoint Themes	Synthesis Notes
Ex. What contextual factors influence implementation?	*Providers showed a steady decrease in PHQ-2 depression scores from baseline to 12 months.*	*Providers in urban clinics (e.g., Philadelphia) had higher PHQ-2 scores than those in rural areas (e.g., Wellsboro)*	*One clinic in southwest Philadelphia reported an increase in PHQ-2 scores at 6 months, possibly due to staff turnover and reduced service continuity.*	*Providers at sites with consistent administrator support showed the most increases in satisfaction with programming across timepoints.*	*Developing communication channels between administrators and providers may strengthen implementation of the intervention.*
EQ1.					
EQ2.					
EQ3.					

Step 5: Suggested Discussion Prompts and Associated Activities

Extract prompts and activity suggestions from EQ-specific sheets to guide data dialogue session discussions. Once the evaluation team completes the rapid data analysis and has a sense of the key data stories that they would like to analyze with attendees, the next step will be to identify some dynamic and interactive activities to invite participants into conversation with the evaluation data. Evaluators can find supportive resources for participatory analysis online to aid them in this decision-making.[8]

Evaluation Question	Discussion Prompt	Suggested Activity	Materials Needed
Ex. What contextual factors influence implementation?	*What site-specific conditions (e.g., staffing, leadership support, community partnerships) helped or hindered implementation?*	*Small group breakout sessions to map facilitators and barriers using a fishbone (Ishikawa) diagram.*	*Flip charts, markers, printed site-level summaries, fishbone diagram templates.*
EQ1.			
EQ2.			
EQ3.			

Section C. Template for Visual Depiction of Key Data Points for Data Dialogue Session Discussion (a.k.a., "Data Placemat")

One way to invite data dialogue session attendees into an interactive analysis of the data is to supply them with a data placemat. A data placemat[10] is a one-page document that lays out key findings from an evaluation effort in condensed, plain language summaries as well as visuals such as charts, graphs, or quotes. Placemats distills takeaways from the analysis that researchers have derived and provide a starting point for attendee discussion and consensus building. Placemats may incorporate space for attendees to notate their thoughts or insights about the data that emerges over the course of a data dialogue session and could be collected at the end of a data dialogue session as another record of attendee input on evaluation data.

Here, we offer a template that could serve as a starting point for developing a data placemat, but users should feel inspired to add their own creative flourishes and initiative-specific components.

Data Placemat Template

Goal 1: Synthesis of Qualitative Data

Theme 1

1. **Subtheme 1.** Lorem ipsum dolor sit amet, consectetur adipiscing elit.
2. **Subtheme 2.** Sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
3. **Subtheme 3.** Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris.

Theme 2

1. **Subtheme 1.** Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore.
2. **Subtheme 2.** Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia.
3. **Subtheme 3.** Mollit anim id est laborum, sed ut perspiciatis unde omnis iste natus.

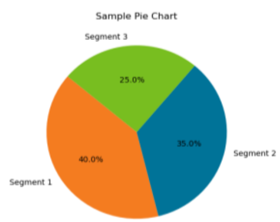
Notes:

Goal 2: Synthesis of Quantitative Data

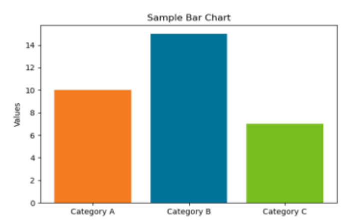
Notable Findings

1. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus.
2. Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis.
3. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit.

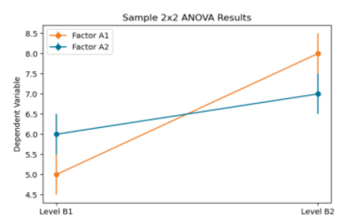
Key Variable 1



Key Variable 2



Key Variable 3



Key Site-Specific Takeaways for Dissemination

Note: This box should be used to reflect takeways generated by data party attendees, and thus left blank.

Goal 1: Key Barriers and Facilitators

1)
2)

Goal 2: Client Level Outcomes

1)
2)

Estimated Replication Costs

Total per year: $$$$$$
Price per client: $$$$

Section D. Example Template for a Data Dialogue Session Agenda

This agenda template is designed to guide facilitators and participants through a structured and engaging data dialogue session and provides a flexible framework that can be adapted for in-person, virtual, or hybrid formats. It helps ensure that all key components of a data dialogue session are covered, from welcoming participants and reviewing goals to co-creating insights and planning next steps.

How to Use It:

- Customize the timing and content to fit your organization's needs, available data, and participant roles.
- Assign facilitators for each session in advance to guide discussions and activities.
- Prepare materials such as data placemats, visualizations, and handouts aligned with each agenda item.
- Encourage participation by incorporating interactive elements like polls, breakout discussions, or creative exercises (e.g., slogan creation).

This template is a starting point—feel free to adapt it to reflect your organization's goals, data, and community context.

General Data Dialogue Session Agenda (4-Hour Format)

Time	Session	Purpose
10:00 – 10:15 AM	Welcome & Introductions	Set the tone, review goals, and establish community agreements
10:15 – 11:00 AM	Evaluation Question 1 Data Review	Reflect on themes from evaluation question 1 data through interactive, facilitated discussion (for qualitative data) and/or data viz techniques (for quantitative data)
11:00 – 11:15 AM	Break	Short break to recharge
11:15 – 12:00 PM	Evaluation Question 2 Data Review	Explore quantitative data through interactive, facilitated discussion (for qualitative data) and/or data viz techniques (for quantitative data)
12:00 – 12:45 PM	Co-Creation: Key Messages & Takeaways	Collaboratively develop insights and messaging
12:45 – 1:00 PM	Break	Optional lunch/snack break
1:00 – 1:30 PM	Group Discussion: Reflections & Feedback	Share reactions, surprises, and implications
1:30 – 2:00 PM	Closing & Next Steps	Summarize key takeaways, outline follow-up actions, and express appreciation

Section E. Example Template for Recording Key Takeaways from Data Dialogue Session Discussions

To facilitate good record keeping of the lessons learned at the data dialogue session, facilitators should be accompanied by a notetaker who can document the key takeaways generated from discussions with the data dialogue session attendees. The notetaker could be a member of the evaluation team, community, or an objective third party. Below we offer a notetaking template that follows the structure of the *Agenda Template* to help streamline documentation of your data dialogue session.

DATA DIALOGUE SESSION NOTES – [ORGANIZATION NAME]

[DATE OF DATA DIALOGUE SESSION]

DATA DIALOGUE SESSION HOSTS: [LIST NAMES OF FACILITATORS/NOTETAKERS]

Instructions:

- **How to use this template:** This template is structured to follow along with the order of the data dialogue session activities, so please note any key insights, discussions, and themes that emerge in the corresponding section of the template. The structure of the activities and any guiding questions are included for reference.
- **Level of detail required:** Summarize high-level trends and perspectives, record key takeaways, and note any areas of confusion or follow-up. We are recording the session via Zoom for transcription purposes.
- **Saving notes:** Save notes with the naming convention Data Dialogue Session Notes_SiteName_Date within a week of the data dialogue session.

Data Dialogue Session Notes

Welcome and Introductions
(15 minutes total)

Data Dialogue Session Attendees: *Please list names of individuals that are attending the data dialogue session. If applicable, please note their role as it relates to the evaluation.*

1. Name Here
2. Name Here
3. Name Here

NOTES: *Please capture the site's goals for today's data dialogue session. Questions in this section include:*

1. Have you heard of a data dialogue session? Has anyone participated in a data dialogue session before?
2. What objectives do you have for today's data dialogue session?
3. What community agreements or norms were established?

[Notes here]

Evaluation Question 1 Data Review
(45 minutes total)

Share Out of Key Themes from Evaluation Question 1 (15 minutes)

Please capture the discussion as to which themes/data points attendees believed to be most influential:

[Notes here]

Facilitation of Participatory Analysis Activity for Evaluation Question 1 (30 Minutes)

Please capture the discussion on the key lessons learned from the evaluation.

[Notes here]

BREAK (15 MINUTES)

Evaluation Question 2 Data Review
(45 minutes total)

Review Data Supporting Evaluation Question 2 (15 min)

Please capture the discussion as to which data points/themes attendees believed to be most influential:

[Notes here]

Facilitation of Participatory Analysis Activity for Evaluation Question 2 (30 Minutes)
Please capture the discussion on the key lessons learned from the evaluation.

[Notes here]

Co-Creation: Key Messages & Takeaways (45 minutes total)

Collaboratively develop insights and messaging (45 minutes)
Structure: A facilitated discussion or activity to create the key takeaways that describe the program/initiative being evaluated to serve as a starting point for dissemination/communications about the success of the program.

Please capture the discussion on dissemination messages. Questions in this section include:

1. *What key takeaways do you feel best represent your program/initiative's successes and challenges?*
2. *Which findings are you most excited about?*
3. *Which findings have the potential to be misrepresented and should not be presented without more context?*
4. *What type of dissemination tool(s) would be best to capture your program/initiative?*

[Notes here]

BREAK (15 MINUTES)

Data Dialogue Session Key Takeaways (15 minutes total)

Group Discussion: Reflections & Feedback (30 minutes)
Structure: Facilitators will walk attendees through a final discussion or activity to generate reflection on the insights that emerged during the data dialogue session.

Please capture the discussion on novel insights gained through the data dialogue session experience.

1. *Overall, did the findings confirm what you expected?*
2. *What reactions or reflections most surprised you today?*
3. *Which insights feel the most relevant and actionable for your organization?*
4. *How do today's insights inform next steps for your organization's program/initiative and sustainability efforts?*
5. *What places of disagreement or differing perspectives emerged? How do these help you understand your data?*

[Notes here]

Closing and Next Steps (30 minutes total)

Structure: Facilitators and attendees summarize key takeaways from data dialogue session experience.

Please capture closing thoughts from the data dialogue session. Questions in this section include:

1. *What next steps were identified?*
2. *Who is responsible for follow-up actions?*
3. *Any final thoughts or appreciations shared?*

[Notes here]

Section F. References

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