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# Using a Decision-Making Placemat to Inform Strategy

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**Keywords:** *Strategic planning, tool, board of directors, data-informed decision-making*

## Introduction

Strategic planning in philanthropy allows board and staff to articulate and commit to their priorities and set a plan for how to accomplish the foundation's goals. Multiple internal and external factors shape priorities, including the foundation's history; current board, staff, and strategy; and the community's most pressing needs (Bryson, 1988). Foundations routinely assess potential new or modified funding areas through needs and strength assessments, identification of potential partners, and input from key stakeholders, including those impacted by the foundation's priorities. Formation of philanthropic strategic direction amid many competing priorities and factors involves the processing and sharing of complex internal and external information with multiple stakeholders, including the board of directors.

The role of a foundation board member in strategic planning varies by organization, with planning ranging from staff-driven to board-driven (Stern, 2013; Mittenthal, Cardona, & Blanchard, 2014). Preskill et al. (2019) identify four realities of foundation boards, including varying levels of understanding of the foundation's work based on disparate experiences and perspectives. Board members also experience different levels of engagement with the foundation, depending on which committees they serve. Ultimately, however, the board of directors makes the final decision on the adoption of a foundation's strategic plan, and the more thoroughly informed and engaged board members are throughout the planning process, the stronger the board buy-in and resulting strategic plan are likely to be. Creating clear and compelling

## Key Points

- Strategic planning in philanthropy allows board and staff to articulate and commit to their priorities and set a plan for how to accomplish a foundation's goals. To do so requires the processing and sharing of complex internal and external information amid the competing priorities and commitments of multiple stakeholders.
- This article explores the development and use of a decision-making placemat tool to inform the strategic shift of the Sisters of Charity Foundation of Cleveland's place-based program area. The foundation has focused its work on housing, health, education, and disparities in outcomes for Cleveland, Ohio, residents who are living in poverty, with focused attention on the city's Central neighborhood. Using the key elements of the foundation's learning approach, the tool guided board members as they worked toward consensus around one of four potential scenarios.
- Use of the decision-making placemat tool strengthened the board's ability to articulate the rationale for the shift in strategic direction, and allowed board members to assume the role of learner by providing a road map for finding and filling gaps in their understanding of the foundation's goals and approaches. And the resulting changes to strategy in the Central neighborhood reflect growing evidence of the interconnections among poverty, health, trauma, and education outcomes, as well as ongoing input from residents and partners.

## *The foundation's investment in education and health in the Central neighborhood was deepened in 2008, when the community emphasized the need for better employment and educational opportunities, greater food access, and infrastructure developments.*

rationales to drive board decision-making requires the synthesis of complex information into a format accessible to and approachable by all board members.

This article explores an organizational learning process that uses data-informed decisions to take action. In the strategy-formation step of a strategic-plan refresh, the Sisters of Charity Foundation of Cleveland's staff developed a decision-making tool for board members and other stakeholders to inform the shift of a place-based program area. This article provides an overview of how the foundation used a decision-making placemat tool with the board within the context of the strategic-planning process to inform its learning journey, exploring how the placemat was developed and how it was used to engage the board in rich discussion that ultimately informed and focused the program area's strategic direction.

### **The Sisters of Charity Foundation of Cleveland**

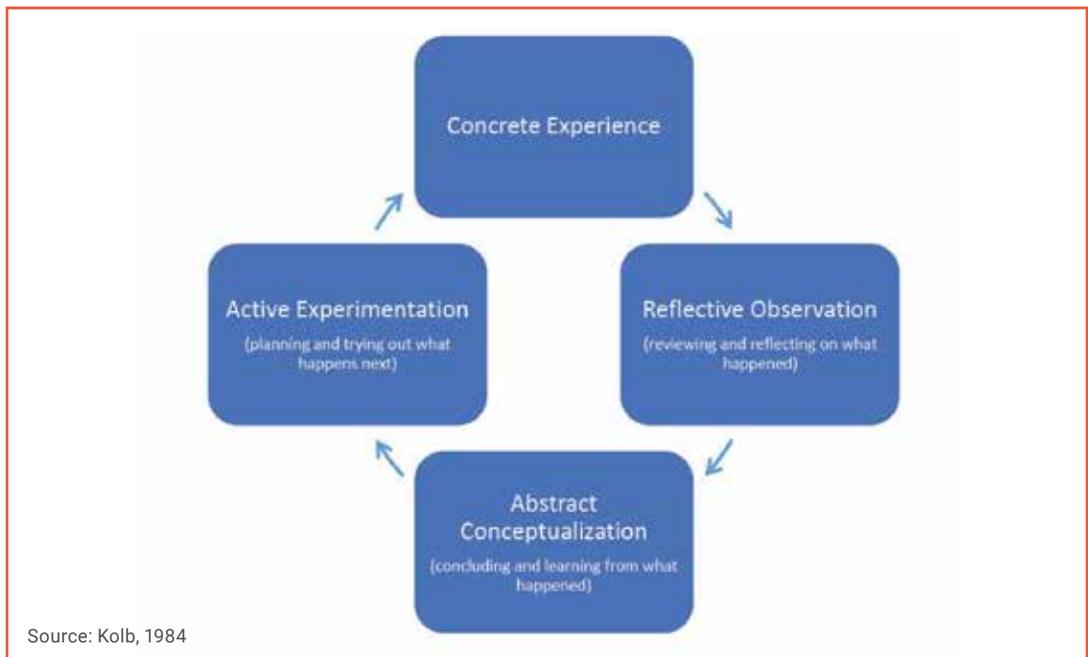
The Sisters of Charity of St. Augustine, the first public health nurses in Cleveland, Ohio, founded the Saint Ann Foundation in 1974. It was the nation's first health care conversion foundation, and the first grantmaking foundation established by Roman Catholic sisters. The Sisters of Charity Foundation of Cleveland was founded in 1996, and in 2006 the two foundations merged with a single mission to improve the lives of those

most in need, with special attention to families, women, and children living in poverty. For more than two decades, the foundation has focused its work and investment strategies on issues of housing, health, and education disparities for Cleveland residents living in poverty, as well as sustaining the organizations that Catholic sisters established to support these populations. The foundation focuses special attention within the Central neighborhood adjacent to downtown Cleveland, based on the sisters' legacy of service to that area.

For decades, residents of the Central neighborhood have lived in concentrated, multigenerational poverty. According to the U.S. Census Bureau (2017), 82% of the children in Central live below the poverty line, and the majority of the neighborhood's residents have low educational attainment and poor health outcomes. The foundation's investment in education and health in the Central neighborhood was deepened in 2008, when the community emphasized the need for better employment and educational opportunities, greater food access, and infrastructure developments. The foundation worked with residents and partners to launch and incubate the Cleveland Central Promise Neighborhood (CCPN), an education-focused, place-based strategy with the goal of every child achieving success in learning, work, and life. Simultaneously, the foundation partnered with residents and organizations in the same neighborhood to address the social determinants of health, ultimately to improve health outcomes through a "healthy eating/active living" strategy. The foundation and its grantee partners routinely use qualitative and quantitative data to inform the future of the neighborhood, incorporating the experiences of partners and residents into a model that ensures success.

### *The Learning Approach*

A guiding principle of the foundation is to learn by using knowledge to drive decisions, evaluate impact, and build mission-based systems of intervention (Maxwell, 2016). Its learning approach is rooted in its founding, when the sisters gave the new foundation its four-part charge:

**FIGURE 1** Experiential Learning Cycle

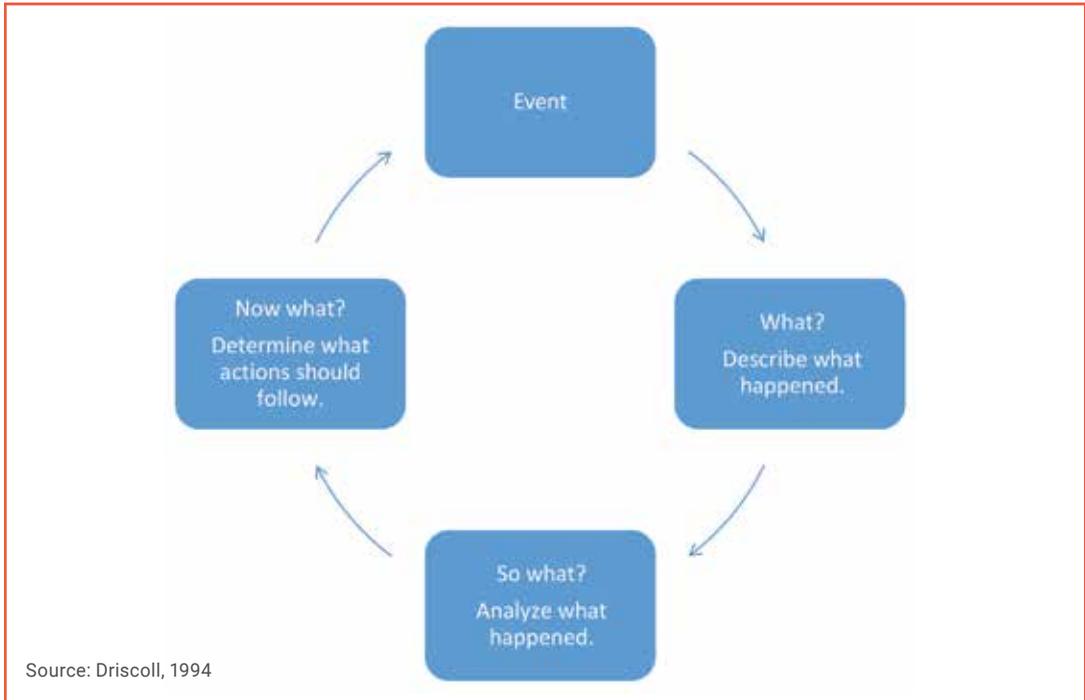
- Understand root causes of poverty in the area,
- Nurture growth of healthy communities,
- Emphasize needs of youth and families, and
- Measure the outcome of these efforts.

In 2013, the foundation completed an impact assessment to understand the community’s perceptions of the foundation’s effectiveness. A consideration from the assessment was to enhance its evaluation efforts and use the resulting information for learning, decision-making, and documenting impact. Here the foundation recognized that learning — or using what was discovered from measuring outcomes to make better decisions — was key to deeper impact. As with other foundations wrestling with complex social issues such as poverty, homelessness, and health and education inequities, the foundation committed to growing its capacity to present understandings concisely to facilitate comprehension and drive change. This meant that context,

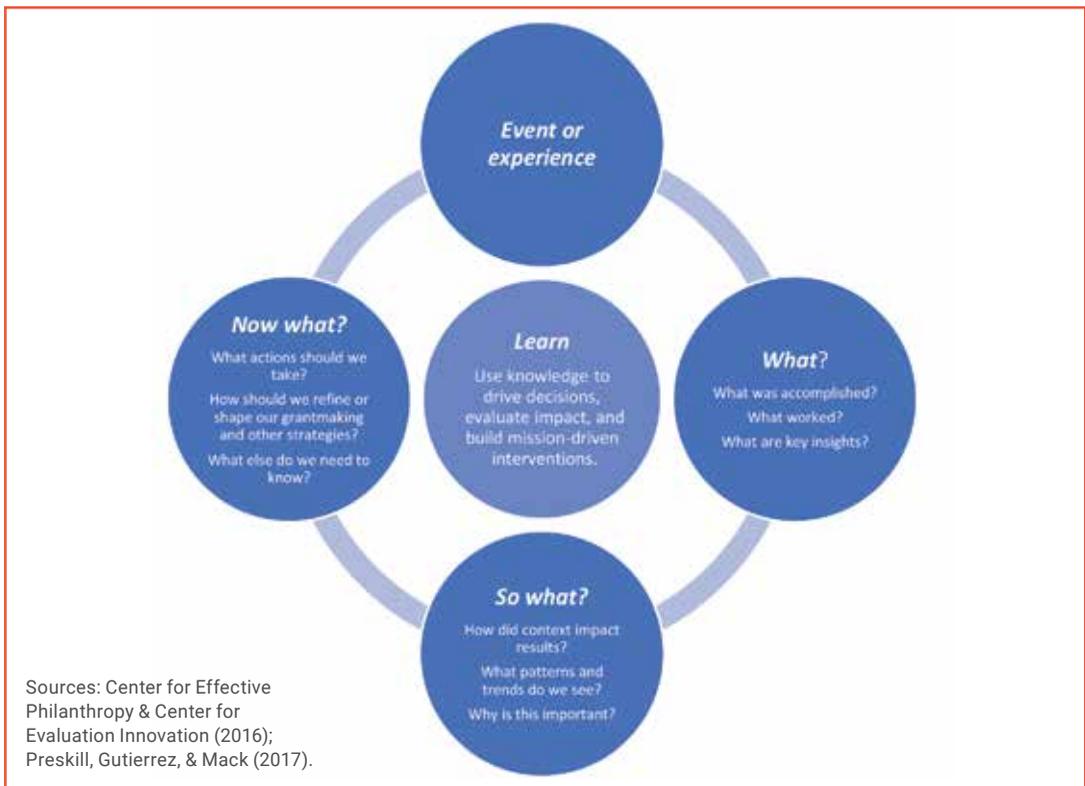
rationale, and situational understanding had to play an equal role in data-collection, analysis, and reporting methods (Preskill et al., 2019). In 2017, the foundation created a full-time knowledge and learning position to operationalize a process for taking action around data-informed decisions.

Today, the foundation is an engaged funder with a small program team that nurtures deep, long-term relationships with grantee partners. Ongoing course adjustment, problem solving, and the development and launch of new ideas are built into the work. Kolb’s (1984) experiential learning cycle reflects this continuous cycle of experience, reflection, and action. (See Figure 1.) Similarly, Driscoll’s (1994) reflective model provides a road map for foundation stakeholders to take action around informed decisions. (See Figure 2.) After an experience, three easy-to-remember prompts — “what,” “so what,” and “now what” — facilitate description for understanding (“what”), deeper examination to consider what does and does not work (“so what”), and shaping next steps and taking action (“now what”).

**FIGURE 2** Reflective Learning Model



**FIGURE 3** Sisters of Charity Foundation of Cleveland Learning Framework



The foundation's learning approach uses these models to provide a framework for developing and refining grantmaking strategies as well as strategies for partnership, community engagement, capacity building, and other philanthropic approaches. (See Figure 3.) Understanding the quantitative outputs of a program are more meaningful for future strategy implementation when they are considered along with historical, political, or social contexts; the voices of those impacted and those of service-provider partners; and other situational information and evidence that provide insights into what is contributing to change. During the most recent strategic-planning process, staff designed a decision-making tool to make visible the three elements of the learning framework. The tool informed board consensus and led to a decision around a strategic shift in direction for the foundation's work and investment in the Central neighborhood.

### *The Strategic-Planning Process*

Over six months, the staff and board participated in several guided conversations. These included staff presentations on key learnings from current strategy, and discussions with local field experts to broaden understanding through other sources of data and evidence from national models and research. These sessions left board members with a more nuanced understanding of the assets and resources in the neighborhood, including a strong network of highly rated early-learning and prekindergarten centers and an "ambassador" program that created a network of over 60 residents participating in leadership development and community-organizing training. Board members also recognized in a deeper way how the layered nature of housing instability, food insecurity, trauma, and physical and emotional safety were impacting areas where the current strategy had not seen expected change, particularly in K–12 academic outcomes.

Board members were resolute in their commitment to staying invested in the neighborhood. They agreed that while the foundation was making progress in improving access to opportunities to improve health and education outcomes, other factors related to poverty, such

as unresolved trauma and poor mental health, were preventing utilization of such opportunities. Recognizing the scope and scale of the complex issues at hand, the board and staff next sought to align the internal and external environmental scans around a shifted strategic goal to ensure the foundation continued to contribute to change in significant ways (Bryson, 1988; Preskill et al., 2019).

### **Tool for Decision-Making**

Several ideas on how the foundation might shift its focus in the Central neighborhood were beginning to surface based on the foundation's history in the neighborhood and input from field experts. Ultimately, four scenarios emerged that focused on issues related to poverty in Central, but each pulled from multiple data and information sources, had varying potential outcomes, and connected to various strengths and attributes of the foundation's history.

Staff looked for tools by which multiple scenarios might be shared with board members in a way that would not be overwhelming, but would provide clarity around the theory of change and rationale for why each scenario might be appropriate for the foundation to undertake. Data placemats —11-inch by 17-inch sheets of paper containing several key data points for discussion — are useful tools evaluators have used to engage stakeholders and enhance understanding of data (Pankaj & Emery, 2016). In philanthropy, these data placemats have been used among various stakeholder groups and focus on evaluation data of philanthropic investments. Using adaptive facilitation, stakeholders are guided through the data placemat(s) and asked open-ended questions to garner input and enable an opportunity to co-create meaning. In the foundation's situation, however, data was only one component of information needed to inform decision-making.

Foundation staff adapted Pankaj and Emery's (2016) data placemat to create a tool that incorporates multiple elements for decision-making in one place and contains all of the information board members need to envision the "what," "so what," and "now what" to consider

**TABLE 1** Sources for Placemat Development

National	Local	Organizational
<b>Evidence-based and philanthropic best practices; expert recommendations</b>	<b>Context, data, resident and partner voices</b>	<b>Mission, history, current focus</b>
<ul style="list-style-type: none"> <li>• Trauma-informed practices</li> <li>• Ascend at the Aspen Institutes’s two-generation approach</li> <li>• Cradle-to-career solutions</li> <li>• Grantmakers in Health’s place-based health strategies</li> </ul>	<ul style="list-style-type: none"> <li>• Central neighborhood                             <ul style="list-style-type: none"> <li>◦ social determinants of health and education administrative data</li> <li>◦ partner interviews</li> <li>◦ resident focus groups</li> <li>◦ asset-mapping focus groups and surveys</li> </ul> </li> <li>• Say Yes to Education (Cleveland chapter)</li> </ul>	<ul style="list-style-type: none"> <li>• Mission: In the spirit of the Sisters of Charity of St. Augustine, we increase the community’s ability to improve the lives of people living in poverty.</li> <li>• Education strategic goal: To help kids in Cleveland’s Central Promise Neighborhood grow up with the tools they need to thrive and be successful, from birth through college, through a coordinated strategic effort.</li> <li>• Health strategic goal: To improve the health outcomes for those most in need in order to reduce health disparities in Cuyahoga County, with a special emphasis in the Central neighborhood.</li> </ul>

**TABLE 2** Decision-Making Placemats: Four Scenarios

Scenario 1: Early Childhood Approach	Scenario 2: Two- Generation Approach to Break the Cycle of Poverty	Scenario 3: Positive Youth Development Approach	Scenario 4: Place-Based Approach to Address Community Trauma
<p><b>Rationale:</b> Improving early childhood well-being has greatest return on investment and greatest potential for mitigating childhood trauma. Nearly half of Cleveland Central Promise Neighborhood (CCPN) residents are children, most of them living in poverty. We have past success in increasing early childhood resources; however, Central residents have identified barriers to utilizing neighborhood resources, including early learning</p>	<p><b>Rationale:</b> Children in low-income families face greater barriers in the early years; child poverty is very high in Central. Residents are underemployed and/or undertrained for higher paying jobs. Opportunities for postsecondary education and training exist, but residents face high barriers to access them. Supporting caregivers to increase family income and children to meet developmental milestones has potential.</p>	<p><b>Rationale:</b> Many CCPN adolescents are disconnected from school or work and may lack positive role models. Positive adult relationships are key to adolescents reaching their full potential. There are opportunities for vocational training, but there are high barriers for youth to access such opportunities. There has been limited success in engaging and connecting Central youth.</p>	<p><b>Rationale:</b> Community trauma is pervasive and creates barriers to trust and utilizing services; many of the symptoms of community trauma exist in Central. Building trust and social capital in the community could lead to positive health and education outcomes. Understanding of community trauma is nascent and much work needs to be done to build awareness.</p>
<p><b>Strategic Goal:</b> Young children in Central are healthy and meet developmental milestones</p>	<p><b>Strategic Goal:</b> Young families in Central reach their full potential.</p>	<p><b>Strategic Goal:</b> Central youth are healthy, productive, and engaged so they are empowered to reach their full potential.</p>	<p><b>Strategic Goal:</b> Prevent and mitigate trauma to create a resilient Central neighborhood.</p>

data-informed strategies for the four identified scenarios. (See Table 1.) Each decision-making placemat comprises multiple sources and types of evidence used to inform the development of the scenario. (See Table 2.) The information is paired with suggestions for strategic direction that give the user an opportunity to explore best practices and evidence-based interventions and approaches that could fit the data.

### Components of the Tool

Foundation staff used multiple sources and types of evidence to inform the development of each scenario and show the reader what raw data the foundation had accumulated. The title of Scenario 2, “Two-Generation Approach to Break the Cycle of Poverty,” grounds it in a theme that emerged from the learning conversations: Breaking the multigenerational cycle of poverty requires strategies that align, coordinate, and provide resources for children and families simultaneously while tracking outcomes for both. (See Figure 4.) Previously, the foundation’s strategy often did not make this alignment explicit.

#### “What”

The “evidence” section presents findings from national and field research that represent key findings and a-ha moments from earlier learning conversations. For Scenario 2, staff elevated evidence that contributed to the board’s interest in this theme, particularly the link between children living in poverty and their greater risk for living in poverty as adults. Each placemat featured one compelling chart or graph to visually illustrate a significant data point; for Scenario 2, this was a visual depiction of the relationship between adverse child and family experiences and household income — information shared during an earlier learning conversation. This depiction illustrated for many board members how the current strategy’s “healthy eating/active living” focus may not adequately encompass the mental and emotional health needs of Central residents. Each placemat also displayed a collection of quotes from Central residents related to the placemat’s key theme as well as related quantitative data from administrative data sources and the foundation’s own data collection. These

*Much of the evidence on the placemats had been presented in previous strategic-planning meetings and learning sessions, but the placemats allowed staff to weave together information from those different sessions.*

qualitative and quantitative data gave the board a sense of how residents perceive the issue and the related core assets of the community.

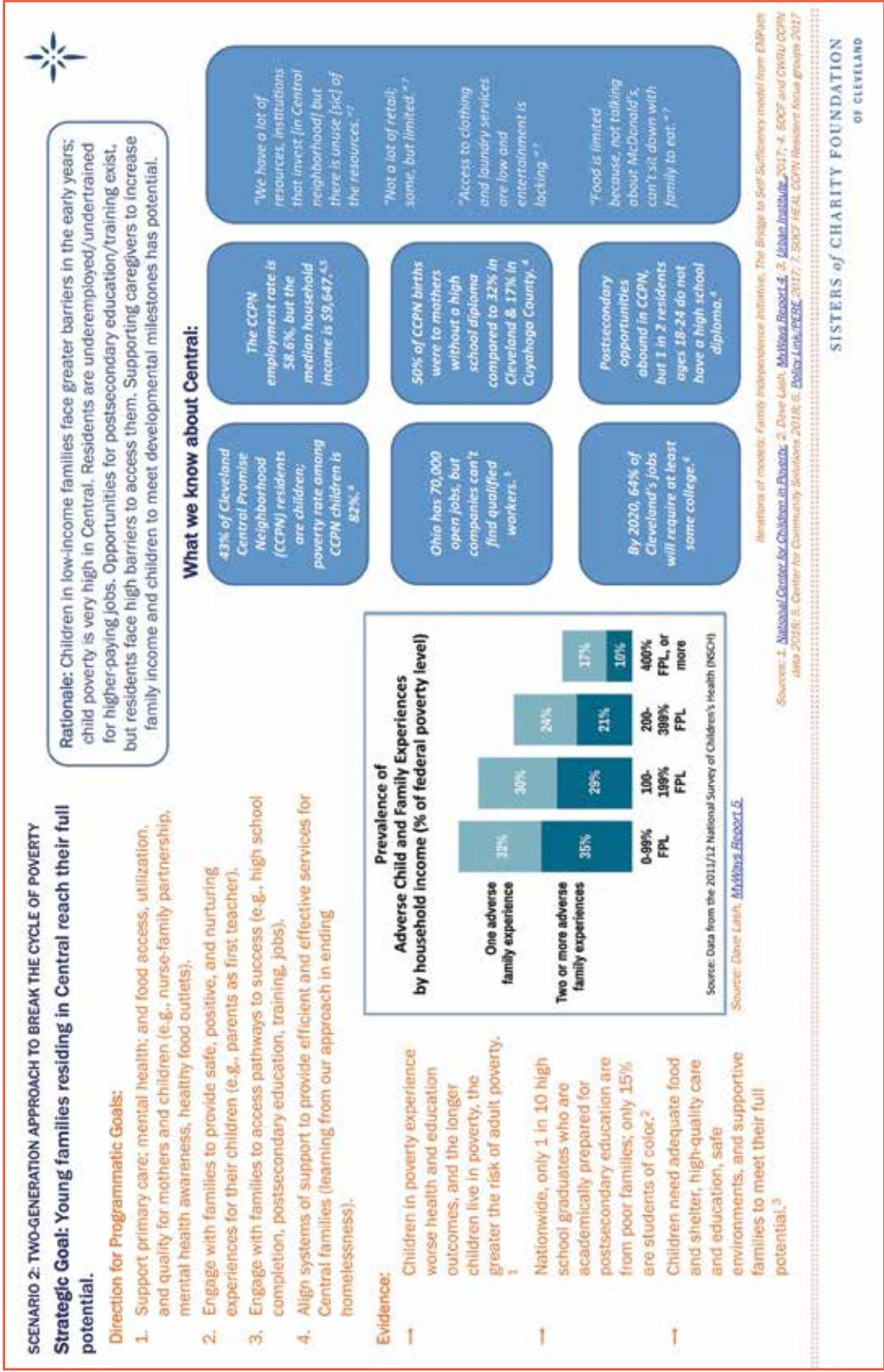
Much of the evidence on the placemats had been presented in previous strategic-planning meetings and learning sessions, but the placemats allowed staff to weave together information from those different sessions. When aligned in this way, these components not only demonstrated the “what” and shared understanding, but also helped to identify how the data formed meaningful patterns of information.

#### “So What”

The “rationale” provides a brief summary of the key evidence illustrated in the decision-making placemat. The rationale statement synthesizes the information presented into useable knowledge, providing insight into why the scenario was important given what the board and staff had uncovered during the learning process.

For the Scenario 2 placemat, staff used the rationale to reinforce that many families in Central live in situations reflecting the needs characteristic of a two-generation approach, and that supporting caregivers and children at the same time has greater potential to break the cycle of poverty. The evidence presented on the placemat illuminates what these needs look like, as residents share directly how families are disconnected from available neighborhood resources. The data reveal how families must navigate unique structural and social/emotional

FIGURE 4 Decision-Making Placemat: Scenario 2



challenges and make daily choices about how to access economic, cultural, and social resources while maintaining family stability.

Taken together, the evidence presents the contexts of Central families holistically, allowing the board to see patterns in the needs of children and adults and leading to a rationale that suggests why a shift in focus to both child and adult outcomes is necessary. This synthesis speaks to the lessons the foundation has learned and how this knowledge might compel the board to select this scenario.

### *“Now What”*

The “strategic goal” and “direction for programmatic goals” elements allowed board members to consider how to use their knowledge of complex social issues to establish goals and take action. The strategic goal for Scenario 2 — “Young families residing in Central reach their full potential” — provides board members with a sense of the long-term goal for change proposed in the scenario. This goal is focused in that it provides an understanding of the target population, but is sufficiently broad to allow for adaptation and nimbleness through the life of the strategic plan.

The “direction for programmatic goals” element focuses on the types of philanthropic support and tools the foundation might use to make progress toward the strategic goal. These directions provide examples of specific interventions that might be appropriate for the scenario, and give a sense of what intervention strategies and philanthropic tools would be utilized within a shorter time frame (one to three years). In the two-generation scenario, the direction for programmatic goals leverages what the foundation has learned in its efforts to end chronic homelessness over the past two decades. The four suggestions — supporting health and well-being quality and access for young children and mothers, supporting quality early learning, supporting young parents in accessing success pathways, and aligning and leveraging resources and systems for support to create a culture of success — reflect how the foundation can contribute to the growth of an aligned infrastructure with a specific population over many

years. With these components, the decision-making placemat became a tool to determine and facilitate the “now what” conversation and decision around the desired path forward.

### Use of the Tool

To share the decision-making placemats with the board, the foundation leadership and the strategic-planning consultant led and facilitated a series of cluster meetings. The foundation occasionally uses cluster meetings to break up the board for small-group discussions. This provides an opportunity for all board members, regardless of scheduling challenges, to attend at least one small-group meeting to hear key information. It also allows for deep learning and rich discussion that is not often possible in a quarterly board of directors meeting.

Each cluster meeting was scheduled for two hours and included seven to nine participants. Participants received a decision-making placemat for each of the four scenarios. The consultant provided an overview of the materials at the beginning of each meeting to explain the tools, and foundation leadership provided five- to seven-minute verbal summaries of each of the placemats. Presentations were brief to allow for ample discussion among participants, beginning with initial observations and questions from the participants. Then, participants were asked a series of questions:

- What most excites you about the scenarios?
- What seem to be the most challenging aspects of the scenarios?
- If you could imagine this work in five years, what would you want to see accomplished?

At the end of each cluster meeting, participants were asked to complete a feedback form to rank their most-preferred and least-preferred scenarios, and provide a written rationale or commentary.

*Using the tool, the diverse members of the board and staff identified how different hypotheses grounded in evidence and resident voice could align with a strategic direction that leveraged the foundation's previous contributions to change and its investment capacity.*

### Feedback

At the conclusion of the meetings, the minutes and feedback forms were compiled and summarized. Of the 25 participants, 21 selected a first and last preference and 19 included a rationale or commentary for their selection. Though each cluster-meeting discussion included a different set of participants, the feedback forms indicated a clear preference (62%) for Scenario 2 (a two-generation approach to breaking the cycle of poverty). However, that preference was nuanced by suggestions for incorporating into it aspects of other scenarios. Of those that provided rationale or commentary, a majority (58%) requested that modifying the top preference be considered. Participants shared a variety of reasons for preferring and/or adapting the two-generation scenario:

- “Scenario 2 allows for the empowerment of Scenario 1.”
- “It seems [Scenario 2] provides for both short- and long-term [return on investment]. To be effective, however, it should be addressed with perspective to Scenario 4, with deep understanding of place and sense of community trauma. Scenario 2 effectively leverages the foundation's strength of systems alignment at a grassroots level.”
- “Thinking [Scenario 2] may be the best opportunity for greatest impact. Although [the number] of people affected may be limited. Recognize all scenarios impact each other.”
- “Impacting early childhood involves the whole family. We need parts of all scenarios.”
- “In order for Scenario 2 to be most successful, focus around trauma/toxic environment in Scenario 4 is needed. I like that Scenario 4 would impact more people and it would support systems change.”
- “I believe that the [two-generation] approach will provide the greatest impact and positively change the lives of the young families and those who are influenced by their outcomes. I believe there are other agencies providing similar resources and creating similar programs to help facilitate the goals outlined in Scenario 3.”
- “Scenario 2 (and 4). I personally want to address Scenario 4, as I believe it aligns with my passion and ultimately addresses the root causes of the problem. For the sake of moving forward and aligning with existing/future opportunities, I select Scenario 2. I believe narrowing the scope will produce measurable outcomes in the immediate future.”

The decision-making placemats had facilitated significant movement on the path toward an appropriate strategic direction. Using the tool, the diverse members of the board and staff identified how different hypotheses grounded in evidence and resident voice could align with a strategic direction that leveraged the foundation's previous contributions to change and its investment capacity (Buteau, Buchanan, & Brock, 2009). Combining aspects of the scenarios was anticipated by the foundation leadership, and the staff set forth to adapt the top preference to incorporate aspects of the other scenarios.

## Results

Staff synthesized the results and findings from the cluster meetings to develop a shift in strategic direction and programmatic goals. Foundation leadership presented this proposed strategic direction to external stakeholders at a Central community advisory meeting designed and led by a core team of four active participants in the resident-ambassador program. There, more than 60 residents and community partners and leaders provided input on the proposed direction. Further refinements from this community discussion shaped the final direction approved by the full board, including:

1. The Central neighborhood strategic goal: Break the cycle of poverty, family by family, by advancing health, education, social capital, stability and economics.
2. Programmatic goals:
  - Work alongside Central residents, including youth, to develop effective relationships, programs, and systems to foster and sustain healthy child development and family economic mobility.
  - Provide parents with multiple pathways and social connections to get family-supporting jobs and achieve financial stability.
  - Equip parents to better support their children socially and emotionally and to advocate for their children's healthy development and education.
  - Ensure access to high-quality early child care and education.
  - Work with health organizations to improve access to primary care, healthy food, and health education, with an emphasis on health-related causes of family instability and low student achievement.
  - Measure and account for outcomes for both children and caregivers, and use

*Deploying the three key elements of the foundation's learning framework then allowed board members to deeply reflect on the evidence and rationale for each scenario and recognize patterns of need and possibility across the scenarios.*

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data for continuous improvement of two-generation programs.

## Discussion

Use of the decision-making placemat tool benefited the board and staff in several ways. The tool provided a clear pathway for board members to align around a strategic direction, somewhat paradoxically by making the case for several related scenarios (Bryson, 1988). Deploying the three key elements of the foundation's learning framework then allowed board members to deeply reflect on the evidence and rationale for each scenario and recognize patterns of need and possibility across the scenarios. Ultimately, this resulted in board members reaching consensus in an informed way.

In addition, the purposeful discussion guided by the tool lead the board to fully consider how the foundation's nongrantmaking strategies and approaches contribute to change in a complex ecosystem like the Central neighborhood (Mittenthal et al., 2014). The board's commitment to remain invested in the neighborhood speaks to the board's recognition that changing contexts and circumstances are inherent in such ecosystems. Board members now are better able to articulate the many implications of this complexity for Central residents, and why the foundation's role as a trusted convener and

*The use of quantitative and qualitative data from many sources provided a strong example of the importance of context and situational evidence in analyzing and interpreting the foundation's work and contributions to change in the Central neighborhood.*

advocate are powerful tools to drive change in such an environment (Bryson, 1988).

Staff also recognizes important benefits related to the foundation's continued growth as a learning organization. One key example is the collective recognition that in order to do the work of the foundation well, staff and board must feel comfortable assuming the role of a learner by asking the question, "What don't I know?" Several board and staff members found that the probing conversations about the foundation's direction led to their own new understandings or ways of thinking about the foundation's mission and strategies, or reignited personal passions and commitments to the Central neighborhood, its residents, and its potential. Using the decision-making placemat facilitated this discovery process by providing a road map for finding and filling the gaps in one's own understanding (Stern, 2013).

Finally, the tool's use of different levels and presentations of data demonstrated to both staff and board the value of each (Preskill et al., 2019). The use of quantitative and qualitative data from many sources provided a strong example of the importance of context and situational evidence in analyzing and interpreting the foundation's work and contributions to change in the Central neighborhood.

## Conclusion

The foundation's board members have varying time to commit and varying expertise and exposure to the complexities of the foundation's place-based strategy, necessitating efficient and effective presentation of proposed strategic-direction scenarios. The decision-making placemat addressed the foundation's need for a clear and concise tool to help board members understand complex information and make informed strategic decisions. The specific dimensions of the paper used for the placemat required foundation staff to choose the information judiciously and present it succinctly. It also allowed the board members to easily see relationships between the information, unlike slide deck formats or other linear formats that may not connect the dots as readily.

A number of key attributes of the decision-making placemat were instrumental in helping board members decipher priorities amid the complexities of poverty. The placemats:

- offered simplicity and clarity;
- gathered all information in one place;
- presented multiple forms of data and information;
- looked across multiple scenarios simultaneously;
- allowed for rich discussion without the sense of being "talked at"; and
- summarized and made the case for each scenario.

The decision-making placemat was useful in the foundation's strategic-planning process by facilitating dialogue and led to a consensus in strategic direction among board members. Changes to the strategy in the Central neighborhood reflect growing evidence of the interconnections among poverty, health, trauma, and education outcomes, as well as ongoing input from residents and partners. Accessing information and evidence from many sources in

a format that was easy to navigate allowed board members to confidently identify a preferred scenario and articulate a compelling rationale for their choice.

This tool may be applicable to other foundations considering a strategic shift and/or desiring deep engagement from the board in strategic decisions. In particular, foundations that address poverty, lead place-based initiatives, or are value-based may find the tool useful for capturing the full complexities and opportunities that lead to informed decisions. It can be used by board strategy or evaluation committees, by foundation strategy and learning staff, or by entire boards to better understand complex issues and make better-informed decisions. It may also be helpful for stakeholders beyond the board, or for exercises beyond strategic planning.

Whenever complex information must be understood in order to make an informed and effective decision, the decision-making placemat can help lay out information and options in a digestible way that will foster deeper understanding of prior experiences and knowledge. By guiding stakeholders through the focused process of considering what is known about an experience or initiative, looking for patterns and explanations for what occurred, and using this understanding to take action, the placemat ensures informed participation and engagement in the decision-making process.

*By guiding stakeholders through the focused process of considering what is known about an experience or initiative, looking for patterns and explanations for what occurred, and using this understanding to take action, the placemat ensures informed participation and engagement in the decision-making process.*

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