How to Gather and Use Qualitative Information to Improve Programs and Decision-Making

Hartford Foundation for Public Giving - Nonprofit Support Program

Dr. Elena Tamanas Ragusa | May 21, 2024
Mini-Series Overview

Session 1
April 25, 2024
Organizational homework

Session 2
May 21, 2024
Individual consultations
What We Covered Last Time

- **How program logic flows**
  Activities --> Outcomes --> Impact

- **The role of evaluation and its process**
  Planning, assessment, casemaking

- **The value of qualitative data**
  Explaining the "how" and "why," adding life and richness to your data

- **Considerations for conducting interviews and focus groups**
  Think about the types of questions you want to answer, the best method for answering them, and from whom you should collect those data.
How We Will Spend Our Time Together

Welcome and overview  The role of evaluation data in your program  Collecting qualitative data  Homework and next steps

This time

Analyzing & reporting qualitative data  Using data to inform decision-making  Where we go from here
Poll Time
To Conduct Evaluation

- Specify evaluation question(s)
- Develop an evaluation design
- Collect and analyze data
- Summarize, share, and use findings

"Now that we know ___, we will do ___."
What do you know (or think) about qualitative analysis?
Some Key Terms to Know

Qualitative coding
The process of systematically organizing data (excerpts) into groups to find themes and patterns for analysis

Code
Labels or tags assigned to data chunks (or excerpts) such as words, phrases, segments, sentences, and paragraphs

Codebook
A list of codes and their definitions. Consider examples, too

Deductive coding
Top down; starting with codes and looking for them in text

Inductive coding
Ground up; starting with text and developing codes
Analyzing Qualitative Data (1)

1) Familiarize Yourself with Data
- Read and reread data
- Take notes on what you see

2) Develop Initial codes
- Consider what you saw in the data
- Consider learning questions
- Consider existing frameworks aligned with your work

3) Make a Codebook
- Keep a list of codes
- Keep the coding scheme as simple as possible
- Include an “other” code

4) Code data
- Use the codes to highlight groups of text
- Can capture emotions, actions, experiences, processes, etc.
- Includes refining and iterating data

5) Validate Your Data
- Check for inter/intra coder reliability
- Coding is not exact; expect differences
- There will be co-occurring codes (more than one applies)

6) Group into themes
- Reorder excerpts in Word, group by Excel column, or cut/glue paper transcripts
A Coding Sample
Interviewer: “How was your visit to the new amusement park?”

“Oh, it was a blast! The roller coasters were insane – my heart was in my throat the entire time. The food, oh my gosh, the food! I had the best funnel cake of my life. But, you know, the lines were crazy long. I think I spent more time waiting than riding. Overall, though, it was an unforgettable day!”
“Oh, it was a blast! The roller coasters were insane – my heart was in my throat the entire time. The food, oh my gosh, the food! I had the best funnel cake of my life. But, you know, the lines were crazy long. I think I spent more time waiting than riding. Overall, though, it was an unforgettable day!”

Codes

Thrilling rides
Amazing food
Long wait times
Unforgettable experience
There is not enough space for everyone.

Our office furniture is dated and needs replacing.

More training is needed at all levels.

Certain departments are put on a pedestal.

There is a lot of redundancy and overlap.

There are leadership problems.
Develop Initial Codes & Make A Codebook

- Management issues (MI)
- Physical environment (PE)
- Personnel practices (PP)
- Employee development (ED)
- Intergroup and interpersonal relations (IR)
- Work structure (WS)
## Code Data

<table>
<thead>
<tr>
<th>CODE</th>
<th>Participant Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>There is not enough space for everyone.</td>
</tr>
<tr>
<td></td>
<td>There is favoritism and preferential treatment of staff.</td>
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<td>Our office furniture is dated and needs replacing.</td>
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<td>We need more objective recruitment and hiring standards.</td>
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<td></td>
<td>We need consistent application of policy.</td>
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<td>There are leadership problems.</td>
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<tr>
<td></td>
<td>Nonproductive staff members should not be retained</td>
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<tr>
<td></td>
<td>Each department has stereotypes of the other departments.</td>
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<tr>
<td></td>
<td>Decisions are often based on inaccurate information.</td>
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<td></td>
<td>Responsibilities at various levels are unclear.</td>
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<td>There needs to be better assessment of employee ability and performance...</td>
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Refine and Validate

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Group Into Themes

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Qualitative Analysis Software

Specialized tools like NVivo, ATLAS.ti, or Dedoose streamline the coding and analysis process.

Using analysis software can enhance the efficiency, rigor, and depth of your qualitative analysis, but it is often unnecessary outside of evaluations and research projects.

**Efficient data organization**
Features for systematic data management and retrieval

**Explore patterns and relationships**
Visualize connections between codes, themes, and concepts for deeper insights.

**Collaborate with team members**
Many qualitative analysis programs support multi-user access and collaboration, supporting validation efforts.
The Role of AI in Qualitative Analysis

AI can help; consider it an intern.
AI can assist in tasks such as coding, pattern recognition, and sentiment analysis.

Big concerns
Potential biases, lack of context understanding, and ethical considerations around privacy and transparency.

Verdict: Tread, but tread lightly
AI should complement, not replace, human judgment; need for transparency and explainability of AI models.

AI can be a powerful tool to assist with qualitative analysis, but its use should be carefully considered, with appropriate safeguards and human oversight.
Analyzing Qualitative Data (2)

7) Report Your Findings
- Consider existing reporting opportunities and methods most appropriate for your audiences

8) Reflect on the Learning
- Consider sensemaking sessions with staff, board, clients, partners, community members, and other key stakeholders.
Reporting Findings

**Disclose methods and findings transparently**
Provide details on data collection tools, analysis techniques, and limitations of findings.

**Contextualize findings**
Situate findings within what is happening at your organization and what your stakeholders care about.

**Explain practical implications**
Discuss how and when you will use the findings for programming, casemaking, and planning. If you don’t intend to use them, explain why.

Being transparent, contextualized, and practical strengthens the credibility and impact of qualitative findings. It also helps create stakeholder buy-in for future requests.
Reflection Using Evaluation Findings

“Now that we know _____, we will do _____."

Questions to ask:

- What am I seeing that I already knew?
- What is something new I learned?
- What are some possible explanations for what I’m seeing?
- What could/should we do differently as a result?

Possible steps to take:

- Create a document of key findings; consider variations by stakeholder group
- Share document(s) with stakeholders and have a sensemaking and action-oriented brainstorming discussion (strategize and plan)
- Try a new strategy and then re-examine (measure and monitor)

Consider natural opportunities for communicating findings such as in regular meetings, events, and annual reports.
Activity 2

- What are the key findings of this analysis?

- How effective was the use of the quotes from Customers 1 through 4?

- If you were NHC management, how would you use these findings?
  To whom, and how, would you report the findings?
Today's Summary

Analyzing data entails familiarizing yourself with data, developing codes, applying those codes, refining them, and then validating them. Once the data are analyzed, report and reflect on the findings. To use findings, consider key questions like what you already know and what is new. Apply learning using a “Now that we know ____ , we will do ____ ” framework.

Evaluation Mini-Series Components

1. Attend Session 1
2. Complete organizational homework
3. Attend Session 2
4. Schedule 1:1 consultation
Thank you!

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