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

PART TWO

Hartford Foundation for Public Giving - Nonprofit Support Program

Dr. Elena Tamanas Ragusa | May 21, 2024

Mini-Series Overview

Session 1

April 25, 2024

Session 2

May 21, 2024

Organizational homework

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

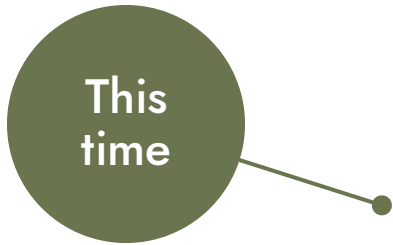Welcome and overview

The role of evaluation data in your program

Collecting qualitative data

Homework and next steps

This time

Analyzing & reporting qualitative data
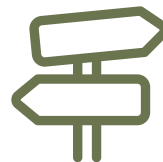
Using data to inform decision-making

Where we go from here

Poll Time

To Conduct Evaluation

"Now that we know ___, we will do ___."
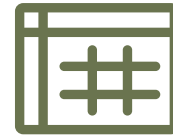
Specify evaluation question(s)

Develop an evaluation design

Collect and analyze data

Summarize, share, and use findings

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
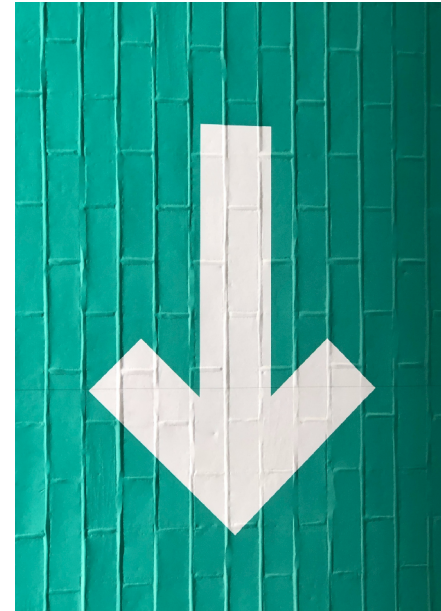
Code

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!"

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Codes

Thrilling rides

Amazing food

Long wait times

Unforgettable experience

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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

CODE	Participant Responses
	There is not enough space for everyone.
	There is favoritism and preferential treatment of staff.
	Our office furniture is dated and needs replacing.
	We need more objective recruitment and hiring standards.
	We need objective performance appraisal and reward systems.
	We need consistent application of policy.
	There are leadership problems.
	Nonproductive staff members should not be retained.
	Each department has stereotypes of the other departments.
	Decisions are often based on inaccurate information.
	We need more opportunities for advancement here.
	There is too much gossiping and criticizing.
	Responsibilities at various levels are unclear.
	We need more computer terminals.
	There is a lot of "us and them" sentiment here.
	More training is needed at all levels.
	There needs to be better assessment of employee ability and performance…
	Training is needed for new employees.
	Many employees are carrying the weight of other untrained employees.
	The components of our office work against one another rather than as a team.
	This office is "turf" oriented.
	There is a pecking order at every level and within every level.
	Communication needs improving.
	Certain departments are put on a pedestal.
	There is a lot of redundancy and overlap.

Refine and Validate

M = 3

PE = 3

PP = 4

ED = 4

IR = 8

WS = 3

CODE	Participant Responses
PE	There is not enough space for everyone.
⭐ IR	There is favoritism and preferential treatment of staff.
PE	Our office furniture is dated and needs replacing.
PP	We need more objective recruitment and hiring standards.
PP	We need objective performance appraisal and reward systems.
M	We need consistent application of policy.
M	There are leadership problems.
⭐ PP	Nonproductive staff members should not be retained.
IR	Each department has stereotypes of the other departments.
M	Decisions are often based on inaccurate information.
ED	We need more opportunities for advancement here.
IR	There is too much gossiping and criticizing.
⭐ WS	Responsibilities at various levels are unclear.
PE	We need more computer terminals.
IR	There is a lot of "us and them" sentiment here.
ED	More training is needed at all levels.
⭐ PP	There needs to be better assessment of employee ability and performance so that promotions can be more objectively based.
ED	Training is needed for new employees.
ED	Many employees are carrying the weight of other untrained employees.
WS	The components of our office work against one another rather than as a team.
IR	This office is "turf" oriented.
⭐ IR	There is a pecking order at every level and within every level.
⭐ IR	Communication needs improving.
⭐ IR	Certain departments are put on a pedestal.
⭐ WS	There is a lot of redundancy and overlap.

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Group Into Themes

✉ **Employee Development**	We need more opportunities for advancement here.
	More training is needed at all levels.
	Training is needed for new employees.
	Many employees are carrying the weight of other untrained employees.

Qualitative Analysis Software

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

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.

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

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?

Evaluation Mini-Series Components

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.

1   Attend Session 1

2   **Complete organizational homework**

3   Attend Session 2

4   **Schedule 1:1 consultation**

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Thank you!

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