

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

Hartford Foundation for Public Giving - Nonprofit Support Program

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# How We Will Spend Our Time Together



Welcome and overview



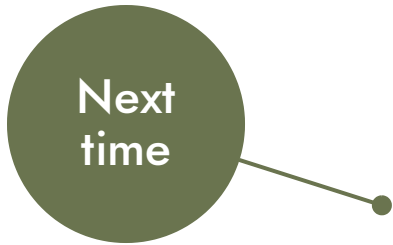
The role of evaluation data in your program



Collecting qualitative data



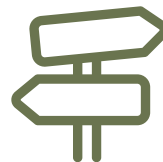
Homework and next steps



Next time



Analyzing & reporting qualitative data



Using data to inform decision-making



Where we go from here

# Mini-Series Overview

**Session 1**

April 25, 2024

**Session 2**

May 21, 2024

**Organizational  
homework**

**Individual  
consultations**

# To Maximize Your Experience



Be present and engaged.



Take part in activities,  
and take notes.



Make it your own.



# Time For A Poll

What role has qualitative data played in your organization's programming, decision-making, and casemaking to date?

- A huge role; we collect and use qualitative data for the above purposes.
- A pretty big role; we collect and use it for one or two purposes identified above.
- A small-ish role; we collect qualitative data and don't really use it yet.
- We want to collect and use qualitative data, but we haven't begun yet.
- I need to be convinced that we should be using our resources for this.
- What are we even talking about?
- Other (please describe in chat)



# How Program Logic Flows



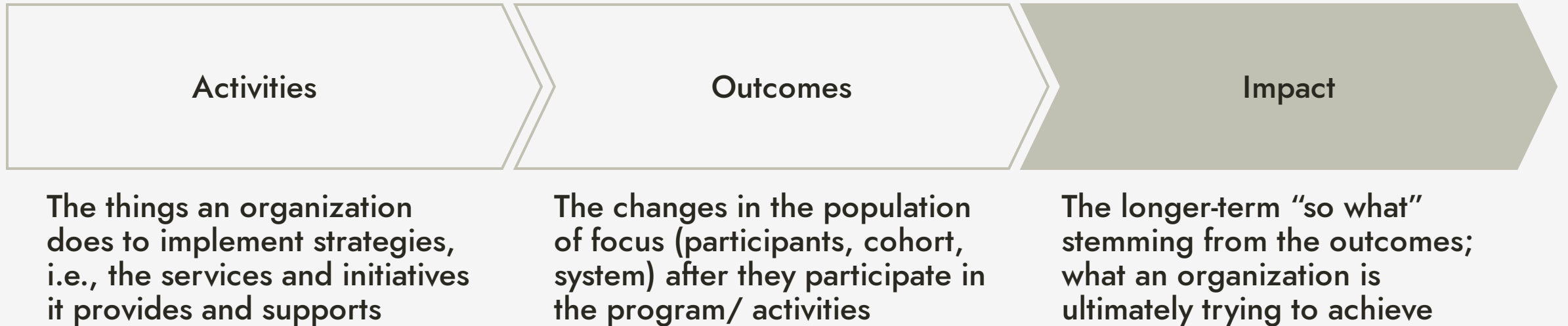
STRATEGIES, ACTIVITIES,  
AND INTERVENTIONS

SHORT AND LONG-  
TERM OUTCOMES

IMPACT

CONTEXT AND ASSUMPTIONS

# Program Logic Flow



# When Program Logic Meets Evaluation

Program logic utilizes **evaluation** to:

- Inform the design of new initiatives, strategies, and directions
- Help understand what is working well, for who, and why to ultimately improve practice and outcomes
- Case make to current and future supporters for sustainability and growth



## PROGRAM EVALUATION

**The thoughtful, systematic collection and analysis of information about the activities, characteristics, and outcomes of programs for use by specific people to reduce uncertainties, improve effectiveness, and make decisions.**

**When do you  
typically  
encounter data  
in your work?**

**What type of data do  
you currently  
report?**

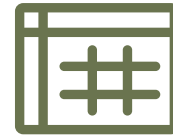
# To Conduct Evaluation



Specify evaluation question(s)



Develop an evaluation design



Collect and analyze data



Summarize, share, and use findings

# To Conduct Evaluation



## Specify evaluation question(s)

What do you (or others who support your organization) want to know about your work? Consider information that will help move you closer to your mission, improve your services or partnerships, and help garner support.

### A Scenario (Part 1):

The Studio Youth Center aims to support young people (ages 12-18) to: **stay in school, graduate on time, contribute to the community, and pursue post-high school plans that align with their future interests.**

To do this, their programming includes:

- tutoring in all major academic areas
- peer-to-peer and adult-to-youth mentoring
- community service activities
- college visits and college preparation
- exposure to professionals across industries

**Imagine you are part of the Studio Youth Center's leadership team. What are some possible evaluation questions you might ask?**

# To Conduct Evaluation



## Specify evaluation question(s)

What do you (or others who support your program) want to know about your program? Consider information that will help move you closer to your mission, improve your services or partnerships, and help garner support.



## Develop an evaluation design

Consider reasonable ways to collect the necessary information to answer the question(s). If not reasonable, consider revisions to your question(s). Steps 1 and 2 are an iterative process.

## A Scenario (Part 2):

The Studio Youth Center aims to support young people (ages 12-18) to: **stay in school, graduate on time, contribute to the community, and pursue post-high school plans that align with their future interests.**

To do this, their programming includes:

- tutoring in all major academic areas
- peer-to-peer and adult-to-youth mentoring
- community service activities
- college visits and college preparation
- exposure to professionals across industries

**Select one evaluation question from Part 1. List out possible evaluation designs. This means ways you might collect information to answer the questions.**



# Start With What You Have

- **What do you already have that you can build from and dig deeper into?**

Attendance records

Assessment results

Emails

Anecdotes

Surveys

**AND SO MANY MORE**

**"Tell me the facts and I'll learn. Tell me the truth and I'll believe.  
But tell me a story and it will live in my heart forever."**

- Native American Proverb

# To Conduct Evaluation

**You are here.**

After assessing what you have, fill in the gaps with new data collection methods.



**Specify evaluation question(s)**



**Develop an evaluation design**



**Collect and analyze data**



**Summarize, share, and use findings**



# What are Qualitative Data?

Qualitative data are non-numerical information that provide insights into qualities, characteristics, or meanings **that help answer "why" and "how."**

- Descriptions of situations, events, people, interactions, and observed behaviors
- Direct quotes and assessments about experiences, attitudes, beliefs, and thoughts
- Excerpts or passages from documents, correspondence, records, case histories, and field notes

**“The stories of qualitative inquiry are compelling and powerful. They capture the experiences and perceptions of real people and real situations. They have the power to move us emotionally and intellectually in a way that quantitative data alone often cannot.”**

MICHAEL QUINN PATTON

POP QUIZ

**Are quantitative data more  
valid than qualitative  
data?**

# Data Collection Methods



## Interviews

One-on-one discussions with participants to understand their experiences and perspectives.



## Focus groups

Facilitated discussions with a small group of participants to uncover insights.



## Observations

Watching participants to understand behaviors or characteristics of a setting.



## Record review aka document analysis

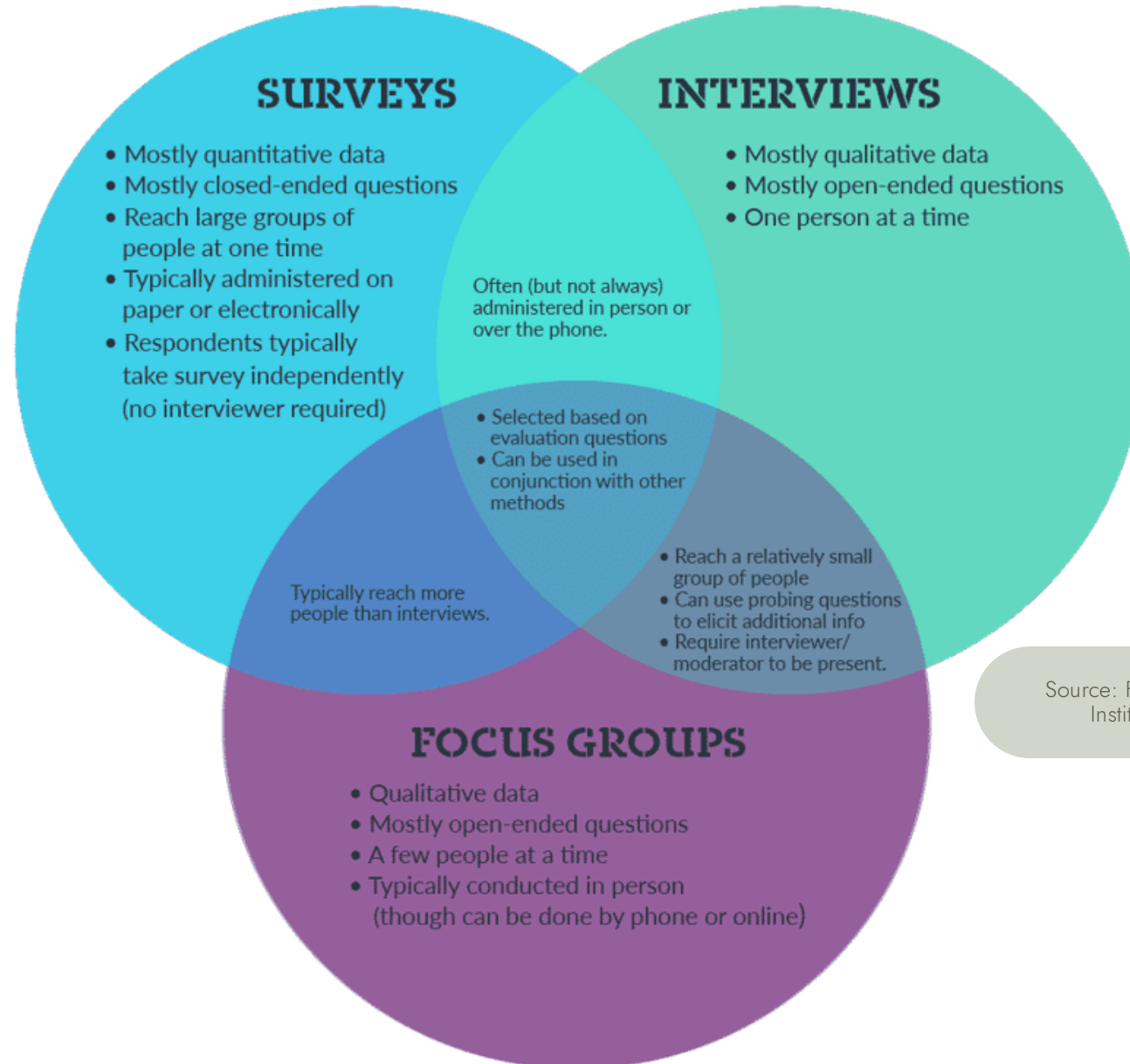
Reviewing existing internal or external documents, records, and artifacts to gather context.



## Surveys

A series of structured questions, often with discrete choices





Source: Frontline Institute

# Pick Your Method(s)

- 1 | What did you enjoy about your experience?
- 2 | What is your race?
- 3 | What could program staff do to get more people to attend?
- 4 | What is your favorite food?
- 5 | If you could change one thing about our program, what would it be?
- 6 | Can you say more about that?
- 7 | How often do you feel sad?
- 8 | What is your experience with this topic?

**OPTIONS:**

1. Survey
2. Interview
3. Focus groups

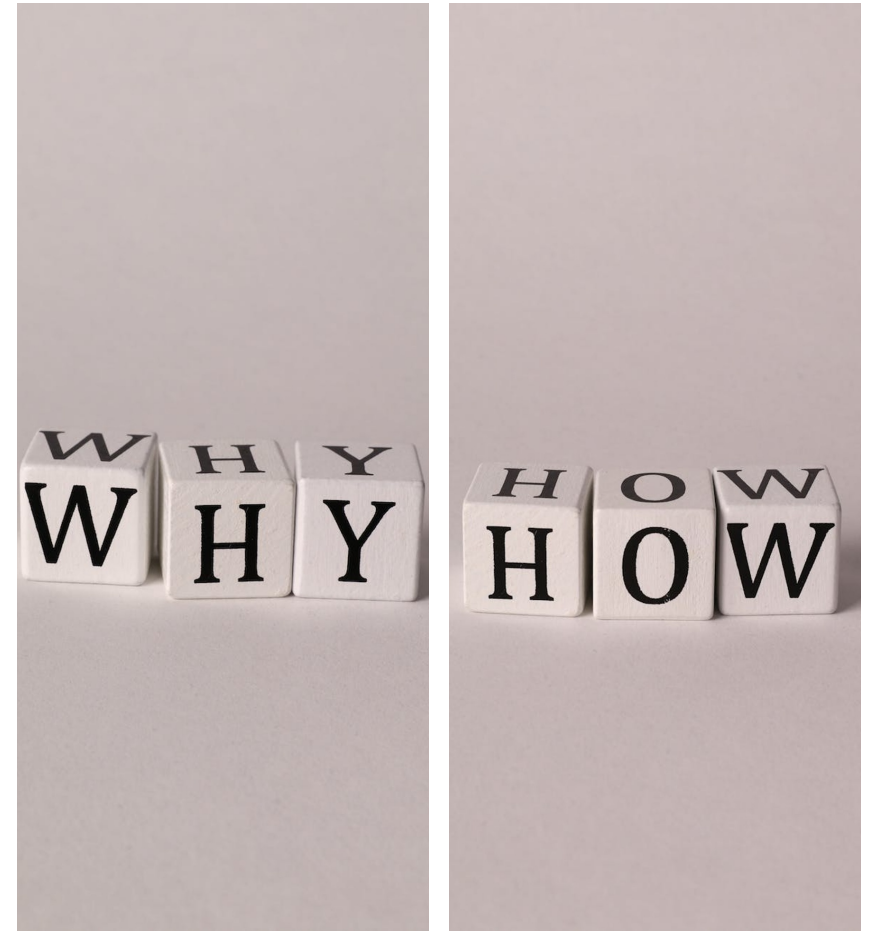
SPOTLIGHT ON

# Interviews and Focus Groups



# When To Use

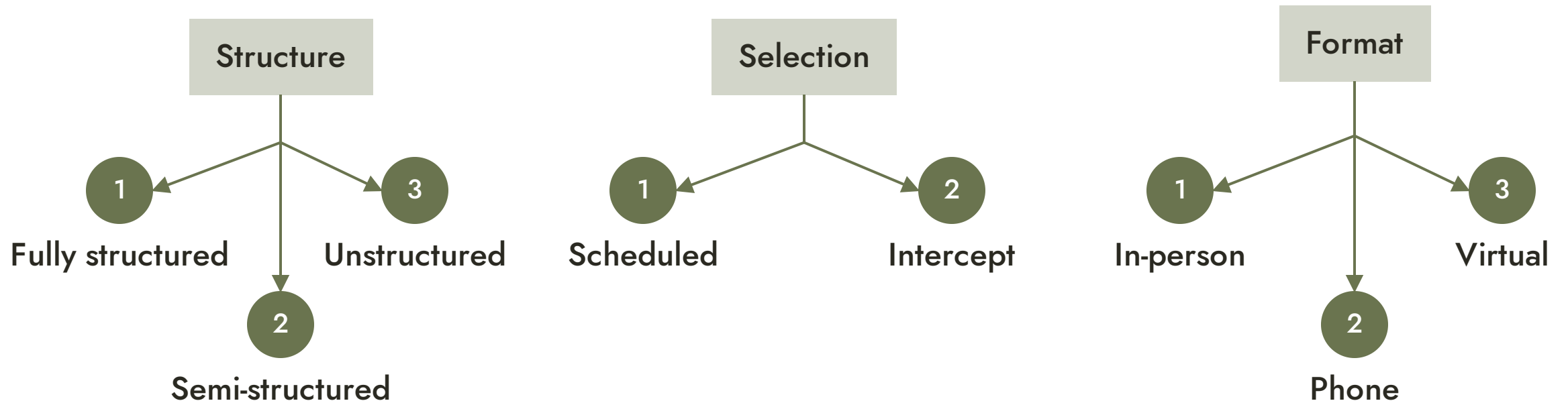
- **To explore:**  
Attitudes, perceptions, and lived experiences using respondent's own words
- **To explain:**  
Assessment of changes in response to program
- **To document:**  
Program implementation, changes over time
- **To include:**  
Perspectives from those unlikely/unable to respond to other requests, shared perspectives stemming from group discussion (for focus groups)



# Interview and Focus Group Limitations

- 1 | Self-report
- 2 | Social desirability bias
- 3 | Skill of interviewer/facilitator
- 4 | Consistency across team
- 5 | Researcher bias
- 6 | Audience bias
- 7 | Small sample size
- 8 | Difficult to analyze
- 9 | Time consuming and costly

# Interview and Focus Group Decisions





# Advantages and Disadvantages of Focus Groups

- **Advantages**

They allow you to speak with multiple people in one session.

Participants can build on each other's responses and spark each other's memories.

Rich data to understand more than just the "what."

- **Disadvantages**

Logistics are tough (space, mutually available time).

Moderating is a more unique skill than interviewing.

More resources (second person, snacks/refreshments if in person).

Analysis can be particularly tricky and time consuming.

# Qualitative Data: Methodological Considerations

- **How much time do you have?**

How long to collect all data? Consider reporting/storytelling opportunities.

How long per instance? Consider how much time people will give you.

- **Who are your ideal respondents?**

How many?

Are they representative?

- **What format will these take?**

If a focus group, how many people per session and who will you put together?

In-person? If so, on-site?

Do they have specific needs (e.g. translation)?

**There are few, if any, wrong decisions. Each choice will simply give you different data.**

# Before Data Collection

- Clarify the purpose, and focus items on answering your evaluation questions
- Select potential respondents (sample). Consider an incentive.
- Collect background information about respondents, if relevant.
- Develop a specific protocol to guide the session and an abbreviated strategy for recording answers.

## Parts of a Protocol:

- 1) Place for key information (e.g. name, date, role, and interviewer)
- 2) Introductory language
- 3) Questions, with room for responses to each
- 4) Closing (Thank you!)
- 5) Interview notes

# Protocol Design - Interview Introduction

**Communicate clearly about what information is desired, why the interview is important, what will happen to it, how long this will take, and how their identity will be used**

## Sample introduction language

*"Thanks so much for taking the time to talk with me today. I am [name] and I work with [organization]. We are speaking with program participants to gather some information to tell the story about what works and to improve what doesn't. We invited you to participate because of your rich history with this program.*

*Our conversation will last no more than 30 minutes and is confidential. That means your name will not be associated with your responses. When we discuss it, we will combine the information you provide us with the information shared by other participants with whom we are also speaking. There is no right or wrong answer to anything I am asking. I am just interested in your perspective and your experience.*

*Do you have questions for me before we get started?*

*I would like to record our session. I will be the only one to hear the recording. I will use it to take notes, and then after I take notes, I will delete the recording. Do I have your permission to record?"*

# Protocol Design - Focus Group Introduction

**Communicate clearly about what information is desired, why the focus group is important, what will happen to it, how long this will take, how their identity will be used, how you will engage with the group, and any group rules for participation.**

## Sample introduction language

*"Thank you so much for doing this. We are [names] from [organization]. We appreciate you taking the time to speak with us. We are conducting these focus groups with program participants to understand your experiences with the program and your thoughts about what is working well, what isn't, and what - if anything - has changed as a result of your participation.*

*We will share the results of the interviews in aggregate with our partners, funders, and staff. In aggregate means the information we share won't be identifiable back to a specific individual or a specific focus group unless we have your green light to share in a way that might identify you, such as a quote.*

*We will be together for about 60 minutes. There are four areas of questions, as well as some intro and closing questions. We'll ask the group of you each question. We do not expect each of you to answer every question. We might not hear everyone's comments on a particular item to move things along. If you disagree with something someone said, please make sure to indicate that - we're not expecting consensus on all of these. We also ask that anything shared in the focus group stays in the focus group; if it is not your experience, please don't share it outside of this group. Finally, we ask that you share the mic. If you've been answering a lot, step back and let someone else have the floor.*

*Are there any other ground rules you would like to propose to the group or any questions for me before we get started?"*

# During Data Collection

- **Use the protocol to record responses**  
For focus groups: Consider the number method and have a second person recording, if possible.
- **Use probes and follow-up questions for depth and detail.**
- **Ask singular questions. Avoid anything loaded or leading.**
- **Ask clear and truly open-ended questions.**
- **For focus groups, monitor who participates and how much. If necessary, ask specific people for responses.**




# After Data Collection

- **Immediately: Record observations after the session.**

Save 15 minutes for this right after the session.

- **Review responses, clarify notes, and decide about transcription.**
- **Evaluate how it went and determine follow-up needs.**
- **Identify and summarize key findings. Highlight good quotes and areas that are still unclear.**



More on  
this next  
time!

# Effective Interviewing Tips

**Check (or summarize) occasionally. Let the respondent know how the interview is going, how much longer, etc.**

**Recognize when the respondent is not clearly answering, and gently press for a full response.**

**Understand the difference between an interview and an interrogation.**

Observe while interviewing, and adjust response accordingly.

**Maintain control of the session and neutrality toward response content.**

**Treat the respondents with respect and as the expert.**

Don't share opinions or knowledge. Don't interrupt unless the interview is out of hand. Don't respond to critiques.

**Practice interviewing to develop your skills!**

Work with staff, trusted individuals, a Zoom recording, and even a mirror to work these muscles.

A large, pink, hand-drawn style speech bubble is centered on a dark, textured wooden surface. The bubble has a pointed tail at the bottom. Inside the bubble, the words "Questions and Discussion" are written in a bold, black, serif font, stacked on two lines.

# Questions and Discussion



# Homework

**Part 1:** Come up with evaluation question(s) you could answer, how you could answer them, your existing available information (data), and your future data collection efforts in Part 1. Before you move on to the next part, collect and organize your existing data.

**Part 2:** Design a focus group or interview protocol to accompany your existing data and answer your evaluation question(s).

**Part 3:** Collect some data! If it makes sense for your question(s), go ahead and start interviewing and/or running your focus groups. If you have data before our next session, you can apply the analysis activities more directly.

**Hello, evaluation mini-series participants!**

This homework assignment has three parts. **Complete at least parts 1 and 2 before our second session on May 21, 2024.**

**Part 1:** Come up with evaluation question(s) you could answer, how you could answer them, your existing available information (data), and your future data collection efforts in Part 1. Before you move on to the next part, collect and organize your existing data.

**Part 2:** Design a focus group or interview protocol to accompany your existing data and answer your evaluation question(s).

**Part 3:** Collect some data! If it makes sense for your question(s), go ahead and start interviewing and/or running your focus groups. If you have some data before our next session, you can apply the analysis activities more directly.

Work with others from your organization who attended the workshop to **complete one homework assignment** for your team. You can also invite others to work with you on this, even if they did not attend. Make sure to give them a good overview of the material as a starting point for the assignment.

Reference the session materials as needed, and reach out with additional questions ([elena@driveevaluation.com](mailto:elena@driveevaluation.com)).

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### Evaluation Data Collection: Initial Thoughts

Name of organization	
Individuals working on this assignment	

## Wrap Up and Next Steps

# A Summary of Today's Session

Start your process by reflecting on what it is you really want to know. See what you have to answer that question. Then, fill in the gaps by collecting new data.

Data can be quantitative (numeric) and qualitative data (words, experiences). The most typical qualitative data collection methods are interviews and focus groups. Consider them to get to the "why" and "how" beneath the "what."

There are a series of considerations and essential steps before, during, and after your data collection.

**Step 1:**  
Complete  
homework

**Step 2:** Come to  
our next session  
on May 21



# Thank you!

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