Qualitative Data Process Guide

A guide focused on continuous quality improvement with an engagement focused approach.

Jackson
COLLABORATIVE NETWORK

Contents

About this Guide

This guide was developed to help give Network partners an in-depth look at Qualitative data methods and how they are able to be embedded into work for continuous quality improvement while having a focus on authentic engagement.

Qualitative Data Methods

Listening Sessions or Focus Groups

Listening sessions or focus groups gather individuals who have a similar experience, behavior, or characteristic. An example could be individuals who have received services from your organization in the last 6 months.

Strengths	Limitations
- Less structure allows facilitator to dig deeper and gain additional information - Can make participants feel more comfortable to be in a group of people with similar experiences - Participants can build off each other's ideas	- Public setting so unable to ask personal questions - Can be costly to hold - Group dynamics could come into play on comfortability of other participants such as social pressure or group think

Planning and implementation:

There are several areas of focus to go through to plan and implement a listening session/focus group.

What's the purpose of your session?

Here look back at your pre-work and clearly define what strategy you're checking in on and what information you're wanting to get out of your session.

Determine focus population

Brainstorm who would be those closest to the problem/issue – Who has experienced the strategies your organization/you are checking in on? Who has spoken out about the barriers they have been experiencing? Keep in mind a diverse group of perspectives will be needed to gather information that will help improve your strategies.

For listening sessions/focus groups, it's important to have a group that's large enough for conversation but small enough that you're able to hear everyone depending on the timeframe you have.

Define questions that will be used to guide the session

These are the questions that will help gather the information you need to help inform the change for your strategies.

Some examples include:

- What's working or making a difference?
- What's not working?

- What would make it better?
- What's missing?
- What would it look like if service systems were easier to navigate?

Identify who will facilitate to support the session

Take time to reflect on your focus population. Who do you have relationships with that would be considered a trusted person to this group? Having someone who has a strong/established relationship and is connected with their group or within the community will help to put people at ease and will be the key to gaining helpful insight.

Determine how data will be captured during the session

During listening sessions/focus groups, a facilitator will be engaging participants in questions/conversation. This means it will be critical to have a way that data will be captured throughout the session. There are several ways this could be done: (participant or other individual with consent from the group) could be taking notes while the participants in the listening session/focus group are talking, there could be a small group discussion where groups capture their own notes, with consent from the group the session could be recorded to later be transcribed this could inhibit authenticity or cause lack of engagement.

There is the opportunity to gather a few different ways data could be captured and then once the group is in session present them with the choices and have the group decide how best to capture the data.

Determine listening session/focus group event details

Think about what will be most accessible for your focus population – Here are some questions to keep in mind:

- What day? (digging deeper: is it a day during the work week? Is this a religious day? etc.)
- What place? (digging deeper: is it on a bus line or easily walked to? Do you need a form of ID?, etc.)
- What time? (digging deeper: will work schedules conflict? Would people need childcare?, etc.)
- What will the stipend structure/resources/food and beverages available look like?
    - If stipend process includes gift cards, be sure to ask the group where they would be helpful. In instances people make assumptions that a grocery store is the best route, but many people have barriers for getting to specific stores.

Reaching out to community partners and going to where they are already gathering is a great source. You're likely to find success to adding to an already existing convening.

Determine follow-up

Identify how to follow-up with the participants to ensure the notes captured are accurate. This step is essential for a transparent/authentic feedback loop. With follow up mention "this is what I heard you say (especially if paraphrasing) and asking did I interpret or get it correct or is there more you want me to know?" Participants need to know they were heard, and that the information collected is reflective of their thoughts/opinions.

Keep in mind, for follow-up you will need to have contact information for each of the participants, so everyone is able to be involved in this step.

Hold listening/focus group session

All the pre-work and planning comes together! Here are a few helpful tips to keep in mind for the session:

- Review the purpose of the session with the group participants
- If you're trying to problem solve, using visuals can be helpful! An example of this is having individuals highlight on a map where services are hard to navigate and why they are hard at locations.
- Review follow-up and how participants will be involved.

One on one interviews

One on one interviews are session between two people, one includes a facilitator who asks the questions and the other, the participant is answering the questions.

Strengths	Limitations
- More conversational and private could make participants feel more comfortable - Less structure allows the facilitator to dig deeper to gain additional information - Private setting and able to ask more personal questions if needed	- Can be costly to hold - Can feel intimidating

Planning and Implementation

What's the purpose of your interviews?

Here look back at your pre-work and clearly define what strategy you're checking in on and what information you're wanting to get out of your session.

Determine Interviewees

Brainstorm who is those closest to the problem/issue – Who has experienced the strategies your organization/you are checking in on? Who has spoken out about the barriers they have been experiencing? Keep in mind a diverse group of perspectives will be needed to gather information that will help improve your strategies.

Define questions that will be used to guide the session

These are the questions that will help gather the information you need to help inform the change for your strategies.

Some examples include:

- What's working or making a difference?
- What's not working?
- What would make it better?
- What's missing?
- What would it look like if service systems were easier to navigate?

Identify who will facilitate to support the interviews

Take time to reflect on your interviewees. Who do you have relationships with that would be considered a trusted person to the interviewees? Having someone who has a strong/established relationship and is connected within the community will help to put them at ease and will be able to gather more in-depth information easier.

Determine how data will be captured during the interview

There are several possibilities how data could be captured for these sessions such as interviewer could be taking notes while the interviewee is speaking, an outside participant could be there to take notes (this may inhibit authenticity or cause lack of engagement), a recording could be taken with transcription of the interview (again, may inhibit authenticity or cause lack of engagement).

With these interviews being more personal, having consent from the interviewee consent and feel comfortable with however data is being captured will be essential. There is always the option of presenting the data collection choices to the interviewee and having them decide which way would make them feel most comfortable during the session.

Determine one on one interview details

Think about what will be most accessible for your interviewee – Here are some questions to keep in mind:

- What day? (digging deeper: is it a day during the work week? Is this a religious day? etc.)
- What place? (digging deeper: is it on a bus line or easily walked to? Do you need a form of ID?, etc.)
- What time? (digging deeper: will work schedules conflict? Would people need childcare?, etc.)
- What will the stipend structure/resources/food and beverages available look like?
    - If stipend process includes gift cards, be sure to ask the group where they would be helpful. In instances people make assumptions that a grocery store is the best route, but many people have barriers for getting to specific stores.

Reaching out to those participating and going where they are will likely lead to more success in making this more equitable.

Determine follow-up

Identify how to follow-up with the interviewees to ensure the notes captured are accurate. This step is essential for a transparent/authentic feedback loop. With follow up mention “this is what I heard you say (especially if paraphrasing) and asking did I interpret or get it correct or is there more you want me to know?” It’s important that they know were heard, and that the information collected is reflective of their thoughts/opinions.

Keep in mind, for follow-up you will need to have contact information for each interviewee to ensure everyone is able to participate in this step.

Hold listening/focus group session

All the pre-work and planning comes together! Here are a few helpful tips to keep in mind for the session:

- Review the purpose of the interview with the interviewee

- If you're trying to problem solve, using visuals can be helpful! An example of this is having individuals highlight on a map where services are hard to navigate and why they are hard at locations.
- Review follow-up to help interviewee understand how follow-up will be done and what they can expect.

Surveys

A set of questions that are aimed at gathering information in relation to a specific issue or problem. Surveys can be conducted in a variety of ways including phone, mail, internet or even in-person.

Strengths	Limitations
- People may feel more comfortable answering questions without talking to others - If available by different methods (ex: online, paper, phone, etc.) can be very accessible to people - Many cheap or free routes if looking to do a paper (including open-ended questions onto intake forms), internet or in-person survey (asking questions when someone comes in for a service) - Would be able to gather responses from a large pool of individuals quickly	- Unable to dig deeper to gather additional information leading to vague data - Can feel impersonal to participants - Having only one method may be a barrier for people to participate - Can be costly if you choose a phone or mail survey

Planning and Implementation

What's the purpose of your survey?

Here look back at your pre-work and clearly define what strategy you're checking in on and what information you're wanting to get out of your survey.

Determine who you want to participate in or respond to your survey

Brainstorm who is those closest to the problem/issue – Who has experienced the strategies your organization/you are checking in on? Who has spoken out about the barriers they have been experiencing?

Keep in mind a diverse group of perspectives will be needed to gather information that will help improve your strategies.

Define questions that will be used on the survey

These are the questions that will help gather the information you need to help inform the change for your strategies.

Some examples include:

- What's working or making a difference?
- What's not working?

- What would make it better?
- What's missing?
- What would it look like if service systems were easier to navigate?

Since surveys are mostly given without any face-to-face communication so there are a few things to keep in mind:

- Reading level: Keeping the reading level of your survey somewhere between 6-8th grade reading levels will make your survey more accessible to everyone. Most surveys tools and even Microsoft Word are equipped to help give you information on reading level.
- Definitions of Key Concepts: Be sure to include definitions of key concepts, you can do this in the survey question itself, on a separate document or even just a link if the survey is online. For you to have accurate data, it's important all respondents has the same definition of these key concepts.

Determine which survey method will be used

There are several different survey methods that can be utilized, and each has their strengths and limitations. For example, mail surveys can be sent out to a mass amount of people but is extremely costly while having an online only survey can also be sent out to a mass amount of people and is fairly cost effective but you're leaving out individuals who don't have access to a computer or internet.

The two most popular survey options are the following:

- Online survey
    - With the continued popularity of social media these surveys are easy to create and market. Survey links can be used and embedded throughout websites, social media sites, emails, and e-newsletters. There are also several free or low-cost options available.
- Paper survey
    - When most people think of paper surveys, they think of the surveys they get through the mail, although that is one way it's not the only way. This could include utilizing surveys that your organization/you are already using by adding in new questions or even adding on questions onto already existing intake forms that clients are required to fill out when they come in for services.

Determine how survey will be distributed

Think about what will be most accessible for your respondent – Here are some questions to keep in mind:

- Do the respondents have access to computers/internet/mail?
- Will there be a helpline or similar for respondents who aren't comfortable taking the survey, don't understand or have questions?
- Will there or What will the stipend structure/incentive structure look like?
    - If stipend process includes gift cards, be sure to ask the respondents where they would be helpful. For example, there are assumptions that a grocery store is the best route, but many people have barriers for getting to specific stores.

Determine follow-up

In many circumstances our community members give us information but there is no follow-up on how we used that information. Even if it's releasing a report, sending it out community wide and marketing it with respondents and those who your organization/you serve. Respondents need to know they were heard and the information that was collected is being used in the way it was intended.

Start promotion/sending surveys

All the pre-work and planning comes together! Here are a few helpful tips to keep in mind when you're ready to send out the survey:

- Promotion of the survey is essential!
    - Leveraging relationships with trusted individuals with those who you are hoping to respond to the survey will encourage others to participate.
    - Within the last few years, the number of scams continue to rise, and it makes individuals worried. Having a legitimacy number or someone for respondents to reach out to so they can confirm the authenticity of the survey will be helpful to ease these worries.
- Include contact information for any questions or technical assistance questions participants may have.
- Include the purpose of the survey in promotion and within the survey itself if possible; let people know what you're using their responses for.
- At the end of surveys, give participants information on plans for how this information will be used or followed up on.

Touchpoint at Service Delivery

Engaging with individuals at the point of service can be an easy and effective way of gathering qualitative data utilizing the procedures that are already in place at organizations. This method involves

Strengths	Limitations
- Convenient, quick and cost effective since it's being added to a process that's already being utilized - Able to switch questions easily and quickly if needed or wanted - Constant flow of data collection with an emphasis on real-time collection	- Unable to dig deeper to gather additional information leading to vague data - Having only one method may be a barrier for people - Only focuses on those who receive the services from or visited your organization

Planning and Implementation

Here look back at your pre-work and clearly define what strategy you're checking in on and what information you're wanting to get out of your touchpoints. This is also a good time to make a plan on where this will happen during your process – Will there be a few questions following intake, would this happen at the end of your service delivery, etc.

Define questions that will be used

It's best to focus on less than 5 questions when you're doing touchpoints, this ensures that the questions get to the points you're looking for but also keeps things quick and efficient.

Determine follow-up

In many circumstances our we gather information but there is no follow-up on how we used that information. Even if this information will just be used internally, updating your clients on what it would be used for and when changes occur, letting them know that these changes were based off of the data received goes a long way with individuals.

Working with the Qualitative Data

Analyzing the qualitative data that has been gathered will be where most of the time is spent during this process. Compiling and theming the data shared by your efforts is an important step to deeply understanding the root causes of the issues/problems you're experiencing.

Managing Qualitative Data

Compile all qualitative data into a format that allows you to work with it more effectively.

- Using regular naming conventions will be helpful to keep files organized. For example, naming a notes document with the name of event and date (CollaborativeNetwork_ListeningSession2_3.10.23.docx)
- Excel is a helpful too for initial collection of data. Each question and set of data should have its own worksheet to support the analysis.
- Below is a template from the Action Planning Discussion Guide that can be helpful – You can find an Excel template here.

<table>
<tr><td colspan="3">Question: (list the question that you used here)</td></tr>
<tr><td colspan="3">Description of Group/Individuals: (provide a high level description of the group or individual(s) that you included in the engagement activity. For example: Families living within the City of Jackson that have children ages 0-5. Include a general description of demographics whenever possible.)</td></tr>
<tr><td>Initial Data Points
(Enter the individual statements from those you engaged with in this column)</td><td>Refined Data Points
(Initial data points may need to be separated or refined to provide a clearer set of data. Examples included below.)</td><td>Perspective
(Community Resident, Stakeholder, Leader, Policy Maker, etc. This will help with data collection and sorting as more and more qualitative data is gathered.)</td></tr>
<tr><td rowspan="2">Example: It is hard to get the help I need to find employment because I don't know who to ask or where to go to get help and the ones I know of aren't located in my neighborhood.</td><td>Example: Residents are not aware of available employment supports and services.</td><td>Example: Resident</td></tr>
<tr><td>Example: It is difficult for residents to access employment supports and services outside of their neighborhood.</td><td>Example: Resident</td></tr>
</table>

Qualitative Data Analysis

This step is about selecting, focusing, simplifying, and abstracting the data that was gathered. This is where the majority of time is spent in the qualitative data process. Below are two ways outlined within the Action Planning Discussion Guide:

Sort and theme at a group level.

One activity you can use for this approach is to cut each refined data point, with corresponding perspective, into individual strips. Group members would work in pairs or small groups to identify things that are related. This works well if there is space to work at large tables or if there is wall space available.

Once the small groups have sorted the data points into clusters, each small group considers the clusters and comes up with a name or title for the collection of data. This name represents the theme.

Supplies needed for this activity:

- Data Points with perspectives printed in large enough font for ease of reading, cut these into individual strips
- Tape if you will be having groups work using a wall space
- Post-it notes or half pages of colored paper for theming groups of data points
- Markers

Staff or a small adhoc sort and theme, then present to the larger group for reflection.

Another approach you can use is to have backbone staff or a small group of members sort and theme prior to presenting to the group for discussion. This approach engages groups less fully in the process; however, it can be useful when timing/scheduling is challenging or when the group prefers to divvy up work for various processes.

The small group should present the identified themes as a draft, allowing the full group a chance to review before finalizing. The full group should have access to all the engagement data as a reference.