United Way Winnipeg

Qualitative Methods

June 2016 | Marianne Krawchuk | Summer Institute

Outline

- Expectations of Session
- Qualitative Methods
  - What are they?
  - When do you use them?
  - How do you analyze results?

Expectations

What are your expectations for the session?

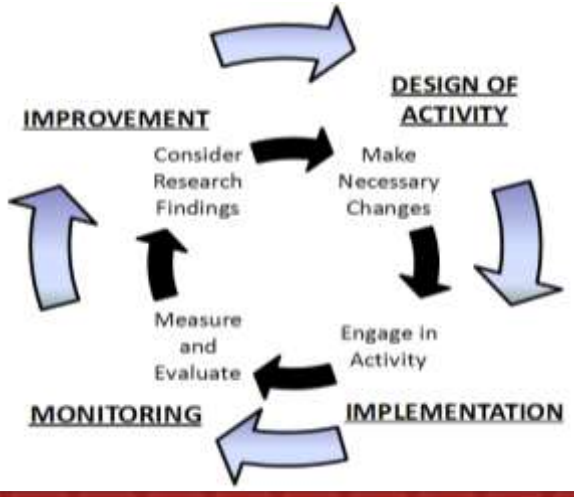
What questions would you like answered?

Program Evaluation

What?

"Program evaluation is the systematic collection of information about the activities, characteristics, and outcomes of programs to make judgments about the program, improve program effectiveness, and/or inform decisions about future programming." (Patton)

Cycle of Evaluation



Program Plan

a.k.a. Logic Model

Outcomes (A+B+C)	Activities	Inputs	Outputs
What do we want to achieve?	What do we need to do to achieve each outcome?	What do we need to have to complete our activities?	What will these activities produce?

Evaluation Plan

How will we know?

Outcomes (A+B+C)	Activities / Inputs / Outputs	Indicators	Measurement Tools
What do we want to achieve?		How will we know we've achieved our goals?	How will we measure/ collect our data?

Measurement Tool Design

There are no rigid rules for making methods decisions. Therefore:

- There is no single best plan for an evaluation
- There is no perfect design
- There are always errors and ambiguities

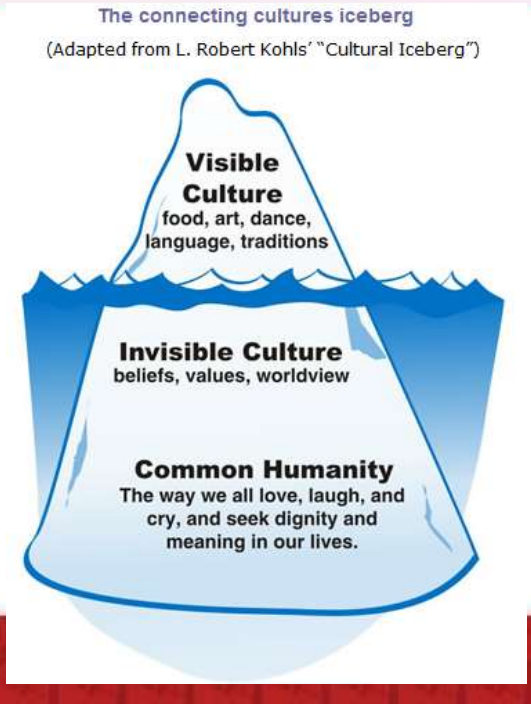
**RESOURCE:
http://www.tbs-sct.gc.ca/eval/dev/sma-pet/guidelines/guidebook_e.pdf

When choosing a methods, consider:

1. The purpose of your evaluation
2. The respondents
3. How information will be used/reported

Also consider:

- Resources available
- Type of information needed
- Least intrusive method
- Advantages and disadvantages of each method
- Need for credible and authentic evidence
- Multiple methods
- Importance of cultural appropriateness



Qualitative data (words, text, narrative):

- Sometimes known as *content analysis* or *thematic analysis*
- Identifies themes/patterns in data
- Themes are coded and categorized to better understand the outcome being evaluated

Qualitative Research

- Primarily exploratory research
- Often used to learn more about reasons, opinions, and motivations
- Provides more in-depth insights in response to the evaluation question

Validity & Reliability

***Reliability**:* refers to the level of measurement error that exists in the instrument or the data.

***Internal Validity**:* refers to the extent to which it correctly answers the questions it claims to answer about what is being evaluated

***External Validity**:* the extent to which the results can be generalized to other situations

Quantitative vs. Qualitative Data

	Quantitative	Qualitative
Advantages	• Answers 'how much/may' • Provides numerical statistics which may be easier to present/understand • More questions answered • Little interpretation is needed (therefore less subjective)	• Can ask for clarifications, 'why' • Non-verbal cues • Allows flexibility • Provides more detailed responses
Challenges	• Need to understand how to analyze/interpret • Doesn't allow for expansion/clarification	• Resource heavy • Small number of responses • Facilitator may influence responses • Subjective/bias • Time consuming to analyze

Quantitative vs. Qualitative Data

Quantitative	Qualitative
- Scales - Frequencies - Percentages - Mean (average) - Mode (most common response) - Median (middle response when responses are arranged in sequential order) - Rubrics	- Open ended questions - Testimonials - Interviews - Focus groups - Content analysis - Case studies - Stories - Observations - Drawings - Photo voice

Data Collection Tools

What tools do you commonly use to collect data?

What works?

What doesn't?

Measurement Tools

Focus Groups, Group Summaries		
Overall Purpose	**Strengths**	**Limitations**
To explore a topic in depth through group discussion.	• Can identify unanticipated issues • Helps explain quantitative findings (can expand/follow up) • Opportunity to share opinions • Empowers participants	• Responses need to be analyzed • Requires a good facilitator • Can be difficult to get group together/participation • Group perspective may distort individual views • Can be time/labour intensive to organize

Focus Groups – Before the session

- Define objectives (determine purpose)
- Choose (train) a moderator
- Prepare 4-6 questions and test them; develop a discussion guide
- Recruit participants (usually 8-12, offer incentive)
- Prepare consent forms
- Find appropriate space (consider location, comfort)
- Assign a note taker and set up recording device

Consent Forms

- Title of project
- Date/time/location
- Description of project & process
- Purpose and intended use of findings
- Potential Risks
- Voluntary withdrawal
- Privacy - Confidentiality/Anonymity
- Incentive
- Resources
- Contact Information

Focus Groups – During the session

- Get consent forms signed
- Explain the purpose
- Explain the session (who will take notes, how information will be recorded)
- Explain 'ground rules'
- Move from general to specific topics
- Be creative – small exercises will help maintain interest and engagement
- Ensure all participants are included in discussion

Focus Groups – After the session

- Thank your participants (either send a card, email, thank them in a newsletter etc…)
- Transcribe data
- Summarize data
- Analyze data (be careful not to generalize too easily)
- Prepare a report and share your findings

Measurement Tools

Interviews, Summaries		
Overall Purpose	**Strengths**	**Limitations**
To provide a fuller understanding of someone's impressions or experiences and to learn more about responses to questions.	• Permits clarification and elaboration of responses • Process builds trust therefore 'better' data • Process does not require a high level of literacy or technology • Greater completion rate than paper surveys	• Time consuming • Difficult to analyze and compare • Can be costly, resource intensive • Requires skilled Interviewers – relationship may influence responses

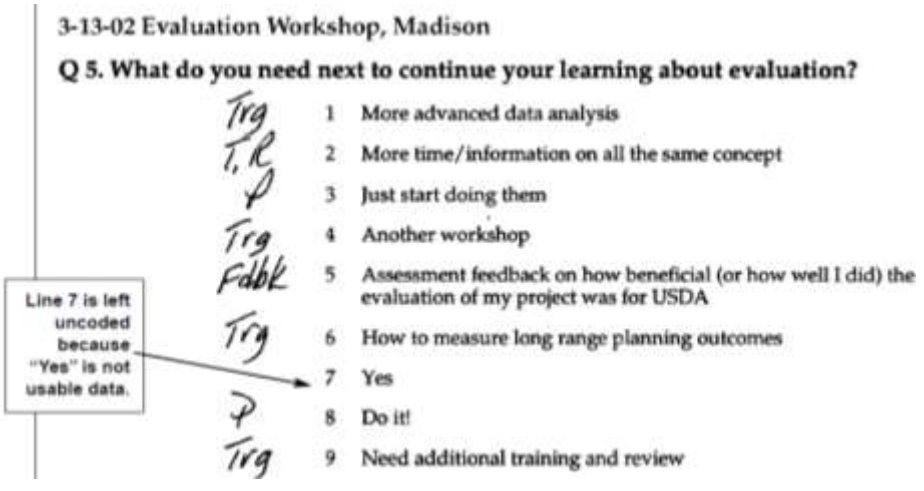
Measurement Tools

Case Studies, Testimonials and Story-Telling		
Overall Purpose	**Strengths**	**Limitations**
To provide a comprehensive examination of a participant's experiences.	• Provides "rich" information on specific cases • Can answer cause and effect questions	• Time consuming to collect, organize, and describe • Reflects only one individual's experience

Analysis

1. Get to know your data
2. Focus the analysis
3. Categorize the information (preset & emergent categories)
4. Identify patterns and connections within and between categories
5. Interpret data
6. Report data

http://learningstore.uwex.edu/assets/pdfs/g3658-12.pdf



Group Activity

1. Form groups of 5
2. Review the responses to the hand out “What major factors lead you into teaching?
3. Develop categories/review preset categories
4. Categorize data
5. Summarize data
6. Be prepared to share with the group

Categories - Preset vs. Emergent

- Pros & Cons
- May need to do both (ie. start with preset & consider additional categories)
- Some categories may have subcategories
- Categories should be mutually exclusive and exhaustive

Be Aware of Unanticipated Outcomes

http://www.youtube.com/watch?v=Ahg6qcgoay4

Before interpreting the data …

- Include representatives from various constituent groups.
- Have all the results organized ahead of time.
- Use tables and graphs to present your data, as appropriate.
- Have information on the purpose and process of the original data collection.

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When interpreting the data …

- Remind people of the purpose/process
- Identify any limitations
- Describe the data as it has been analyzed; then, interpret data
- Be clear about the differences between descriptive analysis and interpretation
- Be cautious about moving to the judgment ('evaluation') stage.
- Look for themes or trends in the data
- Be open to multiple interpretations.

After interpreting the data …

- Identify areas for follow-up; is there something more you need to know?
- To whom should the data and its interpretation be presented?
- Determine how the data and its interpretation should be presented to various audiences.
- Ensure that you have the documentation of all stages of the process for future reference.

Measurement Tools

Photo Voice		
Overall Purpose	**Strengths**	**Limitations**
To provide a fuller understanding of someone's impressions or experiences by examining their view	• Provides "rich" information on specific cases • Can answer cause and effect questions • Involves participants • Less dependent on language and/or high level of literacy	• Potentially time and resource consuming • Difficult to analyze and compare • Subjective; based on participants' experiences/views

Photovoice - 2013 State of the Inner City Report

https://www.policyalternatives.ca/multimedia/photovoice-youth-lens-poverty-winnipeg

Verifying Qualitative Data

- Prolonged engagement/observation
- Triangulation
- Peer review/debriefing
- Negative Case Analysis
- Clarify Evaluator Bias
- Member reviews
- Detailed description

Pitfalls to avoid

1. Avoid generalizing
2. Choose quotes carefully
3. Address limitations and alternatives

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Things to remember…

- There is no one right method of collecting data.
- Each has a purpose, advantages and challenges.
- The goal is to obtain trustworthy, authentic and credible evidence.
- Often, a mix of methods is preferable.

Review

Did we answer all of the questions we wanted answered?

Any other questions?

Resources

Evaluation

- Canadian Evaluation Society, http://www.evaluationcanada.ca
- Canadian Evaluation Society, Manitoba Chapter, http://mb.evaluationcanada.ca/
- Health in Common, http://www.healthincommon.ca/
- My M&E, http://www.mymande.org/howto

Data Collection

- Analyzing Qualitative Data - University of Wisconsin Extension, http://learningstore.uwex.edu/assets/pdfs/G3658-12.PDF

Mixed Methods

Creswell, John W. *Qualitative, Quantitative, and Mixed Methods Approaches Fourth Edition.* Nebraska: Sage Publications, Inc., 2014.

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