LEARNING for ACTION

Participatory Qualitative Analysis

Introduction

Effective facilitation is essential for leading participatory and collaborative evaluation processes:

- It helps us to surface and integrate a multitude of perspectives on whether, how, and to what extent a program is working for its intended beneficiaries;
- It is necessary for building and maintaining trust among stakeholders: trust that they are being heard, that their perspectives are weighted equally among others, and that their participation in the evaluation process is authentic and not tokenized
- It is important for producing the buy-in of stakeholders and relevance of results that ensure evaluation findings will inform real action.

Engaging a variety of stakeholders, including program beneficiaries, in the analysis and interpretation of data in a way that authentically includes their perspective and contributions is important—and takes a set of facilitative skills and tools that go beyond evaluators' typical training in technical analysis. In our work implementing collaborative evaluations, we have found that the same facilitation techniques that produce great meetings and brainstorming sessions can also be used to elicit great insights and findings from a participatory qualitative analysis process.

When to Use Participatory Qualitative Analysis

- When you want to synthesize qualitative data from multiple data collectors in a short period of time—whether those data collectors are part of your internal team, evaluation partners, or members of the community your work involves.
- When you want to integrate multiple perspectives on the key themes and insights emerging from data collection, and examine your interpretation of the data from multiple angles.
- When you want to vet your interpretations of the data with stakeholders before you conduct analyses and offer conclusions and recommendations.

Getting Ready to Facilitate a Participatory Qualitative Analysis Session

Before You Begin Participatory Qualitative Analysis…

- You have defined research/evaluation questions for the project
- You have developed data collection instruments that align with the research questions
- Qualitative data collection is complete, and written notes or transcripts are available
- You have developed the guiding questions for your analysis workshop and shared them in advance with all participants
- Team members have reviewed the data they collected and are familiar with how the content answers the workshop questions

Materials Needed

- Sticky wall and half sheets of paper OR Large, blank wall and large sticky notes
- Markers
- Transcripts of qualitative data collected by team members
- Any related quantitative data you plan to weave together with qualitative findings

Tips and Notes

- In some cases, the workshop questions may be the same as the research questions. In other cases, they may be more like reflection questions about the data or implications of what was learned.
- The more research workshop questions you have, the longer this process takes (allow approximately 30 min per question).
- Do this process when data is still fresh in everyone's minds, not months after data collection is complete.
- Use color to "code" data: for example, colors can represent different types of interviewees/stakeholders, correspond to program phases or components, or denote strengths vs challenges.
- To facilitate report writing:
  - Ask participants to annotate each card with references to specific interviews/transcript pages. Allow more time in Round 1 if you do this, or ask participants to do this in advance.
  - Ask participants to tally on their cards the number of times a certain observation appears in their data, so you can easily speak to whether a finding was a prominent theme or unique perspective.

Facilitation Process

1. **State the workshop question(s) and describe the goals and process of the session**
   - Answer questions from participants as necessary about the goals and goals
   - If the group is larger than 15 people, consider breaking people up into small teams of 2-3 people.
2. **Round One**
   - Participants take 5-10 minutes to write findings on cards—as many as they want, with a suggested minimum of 3-5 cards per person/team
     - One idea per card
     - 3-7 words per card
     - Write big
   - Participants pass up their 1-2 clearest cards (aim for getting 10-15 cards total from the group)
   - Place cards on the wall in no particular order so everyone can see them
   - Read each card out loud, ask if anyone has questions about the meaning of a card, ask the author to clarify intentions as necessary
   - Cluster: group like items together
3. **Round Two**
   - Participants pass up 2-3 more cards with different ideas that are not already on the wall
   - Read cards out loud, clarify if necessary
   - Cluster like items together
   - Label clusters with 1-2 word descriptions of what each cluster is about, and add a distinct letter or number to each one (i.e., cluster A, cluster B, etc.)
4. **Round Three**
   - Participants mark their remaining cards with the letter/number of the cluster they belong to
   - Facilitator places the remaining cards accordingly
   - Facilitator asks if there are remaining cards that don't belong to an existing cluster
   - These cards get passed up and placed—the group may decide they either fit in an existing cluster, or represent a new idea
5. **Naming Themes**
   - For each cluster, ask "What is our insight about this question based on the findings named in the cluster?"
   - Take a few minutes for the group to look at each cluster and theme and ensure that the theme names adequately convey the whole story
6. **Wrap-Up and Next Steps**
   - Read the question and each theme out loud
   - Ask the group a closing reflection question or two (see attached list)

- Thank everyone for their time and participation
- Optional additional steps to support reporting:
  - Integrate quantitative data: With the themes still displayed, identify how any related quantitative data supports or complements the qualitative findings, and add cards of a different color with related quantitative findings to each cluster.
  - Develop a report outline: Use the collective insights developed in the analysis workshop to collaboratively establish a report outline and report writing work plan.

Sample Workshop Questions

Outcomes Evaluation

1. What changes did participants experience because of the program?
2. How did each program component support participant change?
3. What individual characteristics and circumstances affected participant success in the program, and how?

Process/Implementation Evaluation

4. What challenges did staff experience with implementing the program?
5. How did staff address implementation challenges?
6. What organizational characteristics support program success?
7. What have we learned about [outreach/intake process/staff training and readiness/program delivery] that the organization should consider for future implementation of the program?

Assessing Capacity Building or Funder Support for Organizations

8. What have we learned about what the program/organization needs to be successful in achieving their goals and associated outcomes?
9. What barriers and needs do the funded projects/organizations have?
10. What type of support could address the barriers/needs?

Community Needs Assessment

11. What issues are community members most concerned with?
12. What do individuals need in order to have better experiences or outcomes?
13. What could the city do to improve [safety/health/economic prosperity/etc] for community members?
14. What barriers make it hard for community members in need to access services?
15. What are the root causes of these barriers?
16. What could this organization/program do to address these barriers?

Sample Closing Reflection Questions

1. What findings are you most excited about?
2. What findings are most concerning?
3. What findings feel most actionable?
4. What do you observe about the source of observations in each theme?
5. What is something specific you think you/the organization could do differently based on these findings?
6. What is the first action you will take to implement these findings?

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