Analysing Qualitative Data for voluntary & community organisations

September 2025

superhighways
harnessing technology for community benefit

SOUTH WEST LONDON RESEARCH SUPPORT NETWORK

Today's goal

Feel confident to make **better use** of the quotes, case studies, interviews, focus groups and feedback you gather

- ✓ Better understand qualitative data
- ✓ Ideas for light touch approaches to start analysis
- ✓ Confidence to analyse your data systematically
- ✓ See everyday and specialist digital tools in action
- ✓ Plan how you want to approach your analysis

Agenda

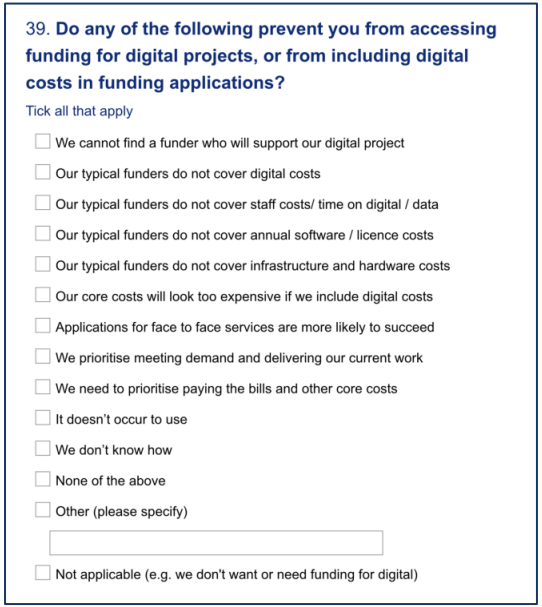
Part 1: An introduction to QDA Getting comfortable with qualitative data	1.30 – 2.00pm
Part 2: Practical ways to analyse data Light touch approaches and tools	2.00 – 2.30pm
Break – with a wellbeing activity	2.30 – 2.45pm
Part 3: Small group work Coding and thematic analysis	2.45 – 3.30pm
Part 4: Final reflections and next steps Plan your approach and next steps	3.30 – 3.55pm
Final Takeaways Wrap up	3.55 – 4.00pm

1. An introduction to QDA

Getting comfortable with **qualitative data**

- ✓ Better understand qualitative data

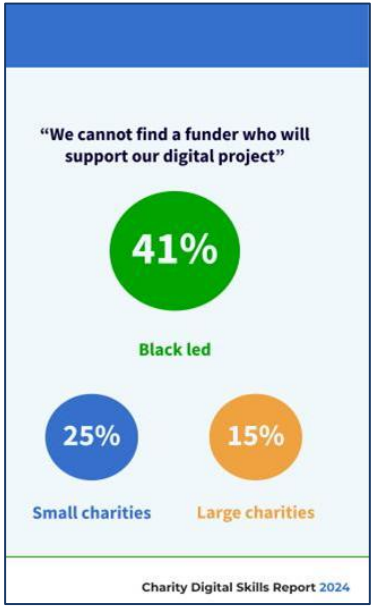
Discuss: What is **quantitative** data?



39. **Do any of the following prevent you from accessing funding for digital projects, or from including digital costs in funding applications?**

Tick all that apply

- ☐ We cannot find a funder who will support our digital project
- ☐ Our typical funders do not cover digital costs
- ☐ Our typical funders do not cover staff costs/ time on digital / data
- ☐ Our typical funders do not cover annual software / licence costs
- ☐ Our typical funders do not cover infrastructure and hardware costs
- ☐ Our core costs will look too expensive if we include digital costs
- ☐ Applications for face to face services are more likely to succeed
- ☐ We prioritise meeting demand and delivering our current work
- ☐ We need to prioritise paying the bills and other core costs
- ☐ It doesn't occur to use
- ☐ We don't know how
- ☐ None of the above
- ☐ Other (please specify)
- ☐ Not applicable (e.g. we don't want or need funding for digital)



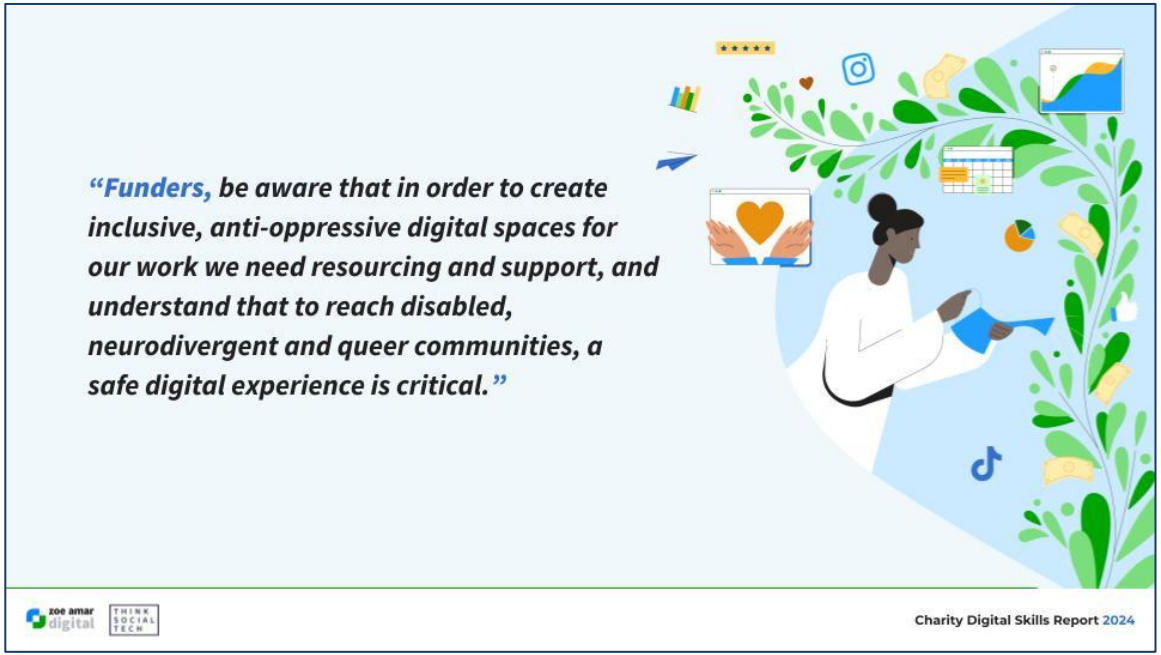
Source: Charity Digital Skills Report 2024

What is **quantitative** data?

- ✓ **Numbers** and statistics about **people's opinions, experiences, feedback**
- ✓ Often collected through polls, **surveys**, feedback forms, counting people, monitoring data
- ✓ Responses to 'closed' questions with **fixed responses** (e.g. Yes / No, or tick box in survey)
- ✓ Things we count, **measure** or translate into numbers (e.g. 80% agreed)
- ✓ Can be benchmarked / **compared** (e.g. validated scales, national averages)
- ✓ Can be 'found' in **secondary data** / open data sets
- ✓ Often used for monitoring data and **reporting to funders**
- ✓ Often **taken more seriously** as 'evidence'

What is **qualitative** data?

Q: How would you describe the key features



Source: Charity Digital Skills Report 2024

What is **qualitative** data?

- ✓ **Talk and text** about people's experiences and opinions
- ✓ Responses given to **open questions** (e.g. Why? Tell us about?)
- ✓ Qualitative data can be gathered as:
  - ✓ Verbal (e.g. audio and video of interview talk, feedback given in person, focus group talk)
  - ✓ Written (e.g. feedback forms, open questions in surveys, zoom chat, client notes)
  - ✓ Visual media (e.g drawings, photographs, video)
  - ✓ Social media (e.g. posts, comments)
- ✓ It is typically changed into **text** for analysis (e.g. transcribed, written notes, client notes)

When does it become **qualitative data**?

Any qualitative information can become data when you **purposefully** do one or more of these:

- ✓ **Collect and store it** methodically (e.g. in a folder, spreadsheet, word document)
- ✓ **Analyse it** for the purposes of evaluation or research
- ✓ **Use it** (or plan to) in a report, publication, slide deck, marketing material

You might 'find' your qualitative data on

- ✓ Social media posts
- ✓ Emails with feedback
- ✓ Client records

Note:

This means you need to be mindful of GDPR and informed consent (see further reading at end)

The value of qualitative data

- ✓ **Understand more about what or why** something is happening
- ✓ **Appreciate** the impact, significance or meaning
- ✓ **Create new insights** from open responses
- ✓ **Listen and hear** what matters to people in their words
- ✓ **Prioritise findings** from other data sources
- ✓ **Inform further quantitative research**

Quick Quiz

Is it **qualitative** data? Yes/No
Why / why not?

Please call out your thoughts – don’t be shy!

Quiz - Q1

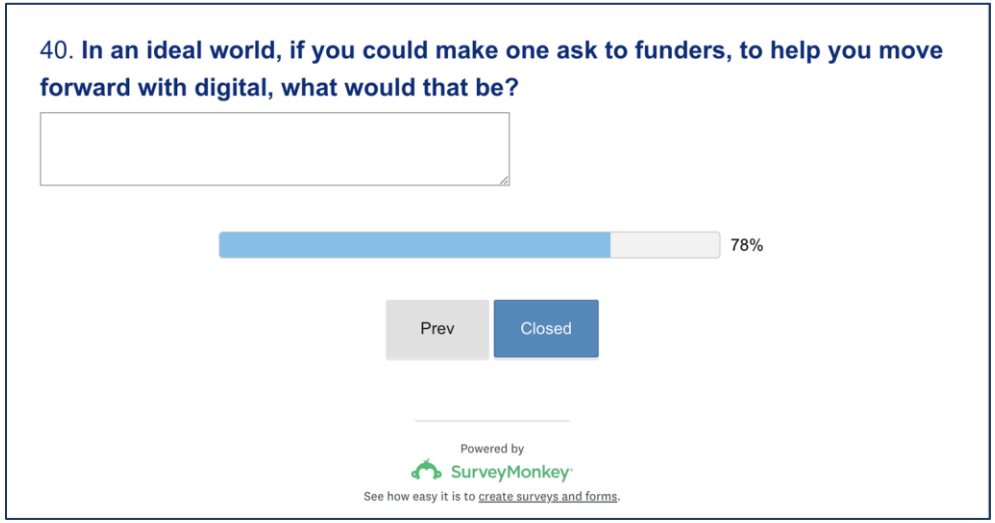
7.4 Transparency

> For years our group didn't have a space, my car was like an office. We finally got a space in Peckham Levels....Southwark has spaces, but it's how to identify the spaces.
>
> **Founder, Holistic Well Women.**

Research from Centre of London noted that there are 24,000 commercial spaces going unused, as of 2018.[16] As the quote above shows, some groups do eventually discover premises that are affordable, suitable, and of good quality, albeit often due to luck. However, many spaces go unused for lengthy periods of time. Transparency about the public and private space available is essential to a sustainable and impactful VCS. It is also important for the Council and other landlords to be informed and strategic: understanding the requirements of VCS groups helps ensure these spaces are directed towards groups who most need them.

Southwark State of the Sector Research 22-23

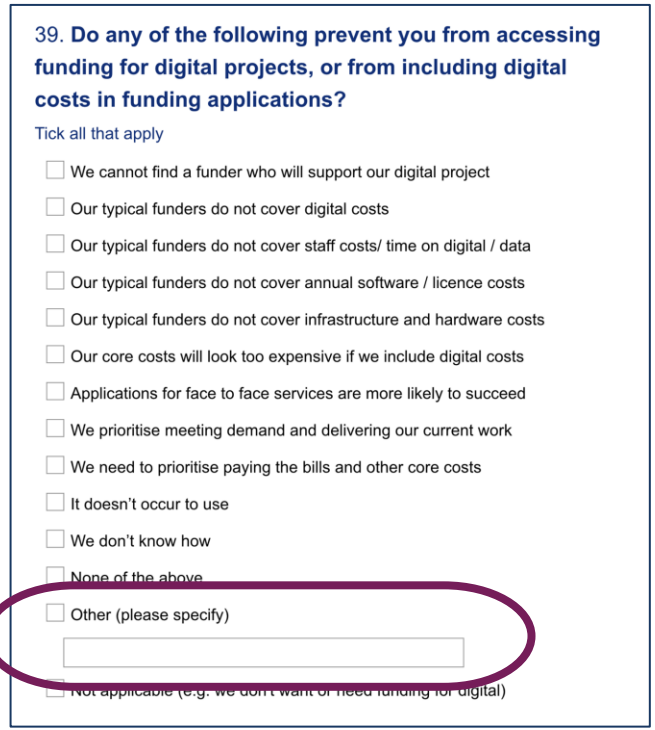
Quiz - Q2



Source: Charity Digital Skills Survey 2024

Quiz - Q3

Other (please specify)



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- ☐ We don't know how
- ☐ None of the above
- ☐ Other (please specify)
- ☐ Not applicable (e.g. we don't want or need funding for digital)

Source: [Charity Digital Skills Survey 2024]

Quiz - Q4

"Freakishly shiny hair? I really do use Head and Shoulders"

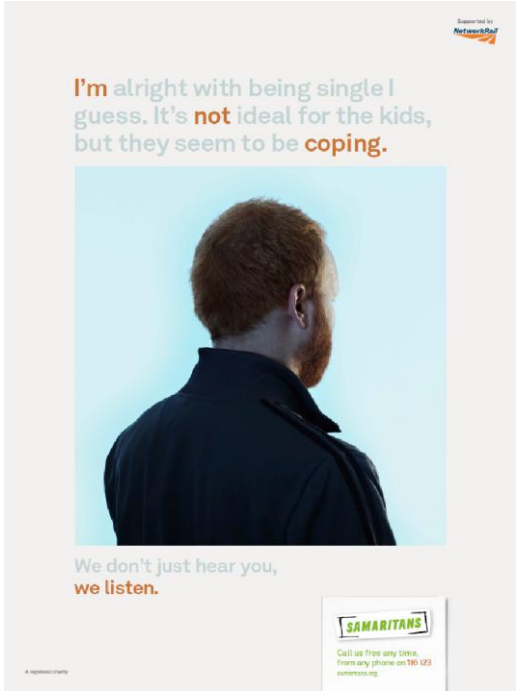
Claudia Winkleman (assumed)

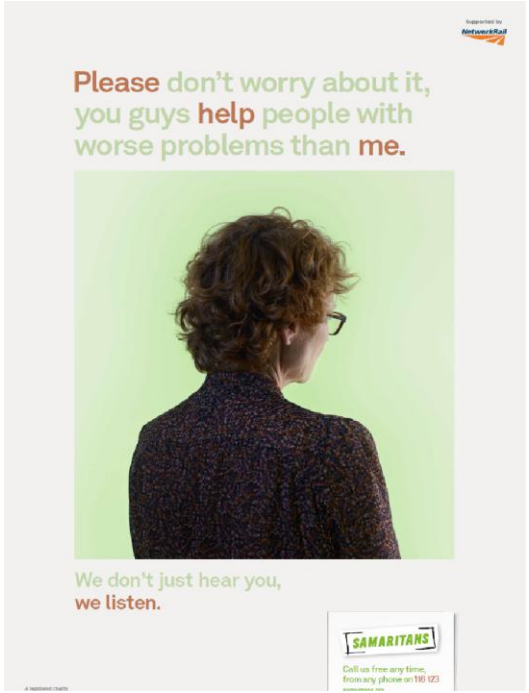
The value of **sharing qualitative data**

Qualitative data can help us to (e.g. in reports)…

- ✓ Bring **data to life**
- ✓ Tell a **compelling story**
- ✓ Can be more **memorable** or stand out
- ✓ **Communicate** what a problem means
- ✓ **Share** people's views / experiences **in their words**
- ✓ **Help the audience** understand a different reality
- ✓ **Bring people together** around a problem

Listening


I'm alright with being single I guess. It's not ideal for the kids, but they seem to be coping.
We don't just hear you, we listen.
SAMARITANS


Please don't worry about it, you guys help people with worse problems than me.
We don't just hear you, we listen.
SAMARITANS

2. Practical ways to analyse data

Light touch approaches

- ✓ Ideas for light touch approaches to start analysis

Four light touch approaches

Dive into the data and see what you learn:

1. Visually spotting themes
2. Word clouds
3. Interview summaries
4. AI generated summaries

When to use light-touch approaches

These approaches help most when you

- ✓ Are just getting started with analysis
- ✓ Are short on time
- ✓ Are working solo
- ✓ Plan to use the findings for a time-bound or specific practical purpose (E.g. How can I improve my next training session?)
- ✓ Have responses which are straightforward and literal to interpret
- ✓ Have limited use for the findings (e.g. quotes to add to a report)
- ✓ Have no specific or intended purpose / actions to take
- ✓ Low value project (limited budget, funding, plans to continue)

1. Visually spotting themes

This is the foundation for all qualitative analysis!

Read your quotes or interviews and **identify themes** or patterns

Process

- ✓ Look for common terms, phrases or words used
- ✓ Look for topics which are discussed most often
- ✓ Look for any clear differences of opinion/experiences
- ✓ Identify themes in the responses, based on:
  - ✓ What people say and how they say it (positive, negative, feelings)
  - ✓ Any differences for specific groups of participants
- ✓ Write a set of statements which summarise your findings

Tip: Don't be afraid to draw on your own experience, previous learning, or wider research

Activity 1: Over to you …

In Mentimeter please answer the question:

"How do you feel about analysing your qualitative data and why?"

Instructions

Go to

www.menti.com

Enter the code

5918 4025

Or use QR code

Example: Over to you...

Together, can we spot any common themes?

- Are there similarities in the responses?
- Do certain words / subjects come up a lot?
- Are there any clear differences in how people feel?
- What emotions are coming through?

Example: Over to you…

How do you feel about analysing your qualitative data and why?

Bit intimidated.

Curious and excited. Nice to hear the story behind respondents feelings and experiences rather than quant data only!

I feel confident but sometimes worry I can be a bit leading with my questions when I know the person.

I feel ok about analysing qualitative data but at times feel overhwlemed by the volume of data and difficult to condense things down

Hopeful that it will add context to a dry data presentation I am doing!

Can be daunting with large sets of data

Excited. Because they give colour and texture to understanding and explaining how the programme and innovations work.

I feel quite confident overall but I sometimes find knowing what to ask challenging, as well as what to give weight to in the analysis.

Excited about finding interesting patterns across the responses

Excited to learn what tools to use to analyse data and gain insight

Lots of data so sometimes not sure about how to prioritise what to use

I feel quite confident but always willing to learn more

It is really interesting to understand feelings and experiences through qualitative data, although for larger sets of qualitative data, it becomes quite overwhelming in terms of analysis.

Done market research qual analysis before but long time ago.

Procrastinating over starting the transcription!

I am curious to learn techniques to analyse Qual data.

It's useful to give a personal approach to statistics

Example: grouped by Mentimeter AI

Excitement

5 responses

- Excited. Because they give colour and texture to understanding and explaining how the programme and innovations work.
- Excited about finding interesting patterns across the responses
- Excited to learn what tools to use to analyse data and gain insight
- Hopeful that it will add context to a dry data presentation I am doing!
- Procrastinating over starting the transcription!

Overwhelm

4 responses

- Bit intimidated.
- Can be daunting with large sets of data
- I feel ok about analysing qualitative data but at times feel overhwlemed by the volume of data and difficult to condense things down
- It is really interesting to understand feelings and experiences through qualitative data, although for larger sets of qualitative data, it becomes quite overwhelming in terms of analysis.

Confidence

3 responses

- I feel quite confident but always willing to learn more
- I feel confident but sometimes worry I can be a bit leading with my questions when I know the person.
- I feel quite confident overall but I sometimes find knowing what to ask challenging, as well as what to give weight to in the analysis.

Techniques

3 responses

- I am curious to learn techniques to analyse Qual data.
- Lots of data so sometimes not sure about how to prioritise what to use
- Done market research qual analysis before but long time ago.

Curiosity

1 response

- Curious and excited. Nice to hear the story behind respondents feelings and experiences rather than quant data only!

Personalization

1 response

- It's useful to give a personal approach to statistics

2. Word clouds

- ✓ Word it out (word cloud tool)
- ✓ Mentimeter (word cloud Q)
- ✓ Make sure you can exclude common or 'stop' words (e.g. 'and', 'to')

Example

- ✓ Q: What did you learn about what is needed to build strong communities?
- ✓ 79 responses

Spot interesting and key words

- ✓ People, together, communities
- ✓ Events, activities, support, spaces, safe

What is needed to build strong communities?

3. Interview summaries: Example

Interview 1: Participant name or code (Datawise London Case study here)

About them

About their data project, their goal

Topics discussed

- Data skills and capacity
- Tools / systems used
- Challenges
- Funder influence
- Data Project
- Sharing findings
- Priorities for next year

"Data is important, because without it our community remains invisible. If you can collect data then do."

"Case studies bring data to life. It humanises data and makes the experiences relatable"

3. Interview summaries

Process

- ✓ One page per participant
- ✓ Include key information about the participant / context
- ✓ Summarise each topic discussed
- ✓ Add ‘good’ quotes (e.g. interesting, snappy, helpful)
- ✓ Do asap after the interview!

Pros

- ✓ Reduce overwhelm
- ✓ Less data (condense 100 pages of transcripts in to 10 pages)
- ✓ Useful to track interviews over a long period of time
- ✓ Starts you thinking about analysis
- ✓ Easier to share with colleagues

Issues

- ✓ Can feel time consuming
- ✓ Relies on your interpretation, misses bigger picture

4. AI tools

- ✓ Useful to create summaries, identify themes, find quotes, draft report structures
- ✓ Generative AI tools (e.g. Claude, ChatGPT) or AI embedded in other tools (e.g. Miro, OtterAI, Copilot)

Challenges

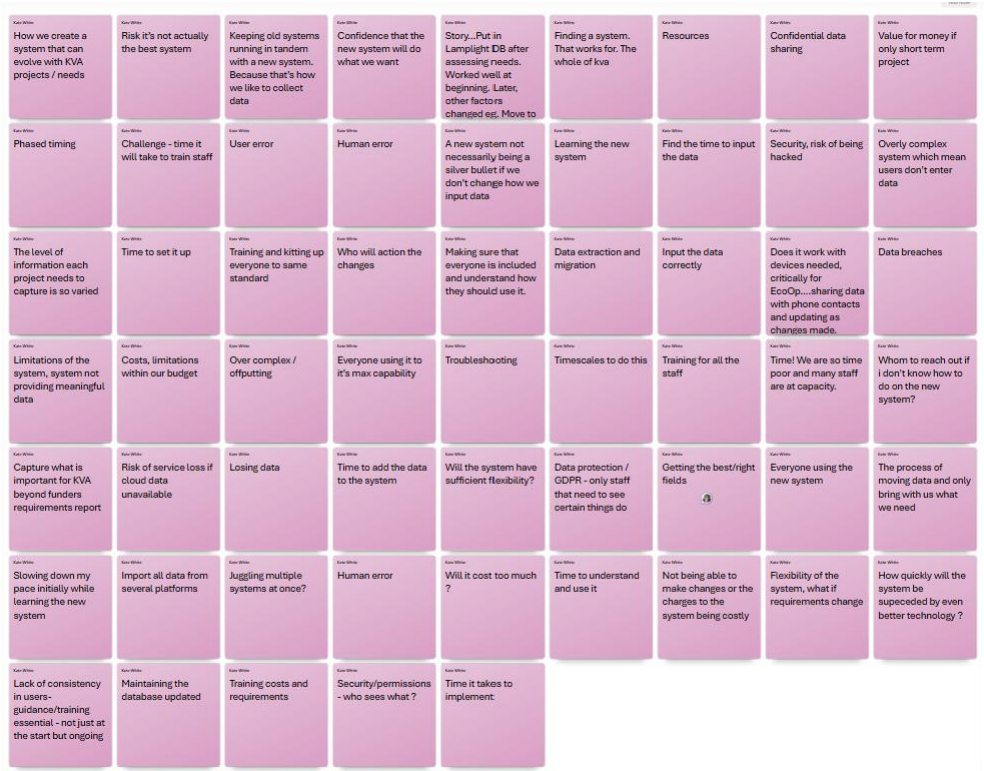
- ✓ Inconsistent: Can give different results each time
- ✓ Misleading: Authoritative tone is hard to ignore
- ✓ Prompts: It only knows what you tell it, you have tacit knowledge
- ✓ Literal: Analyses common words and clear content, missing broader themes

Top tips

- ✓ Get to know your data - never rely on it alone
- ✓ Never enter personal or identifiable data
- ✓ Learn about and get confident with prompts
- ✓ Save your prompts and outputs

M365 Whiteboard

Team workshop – what are the risks and challenges to moving to a new system?

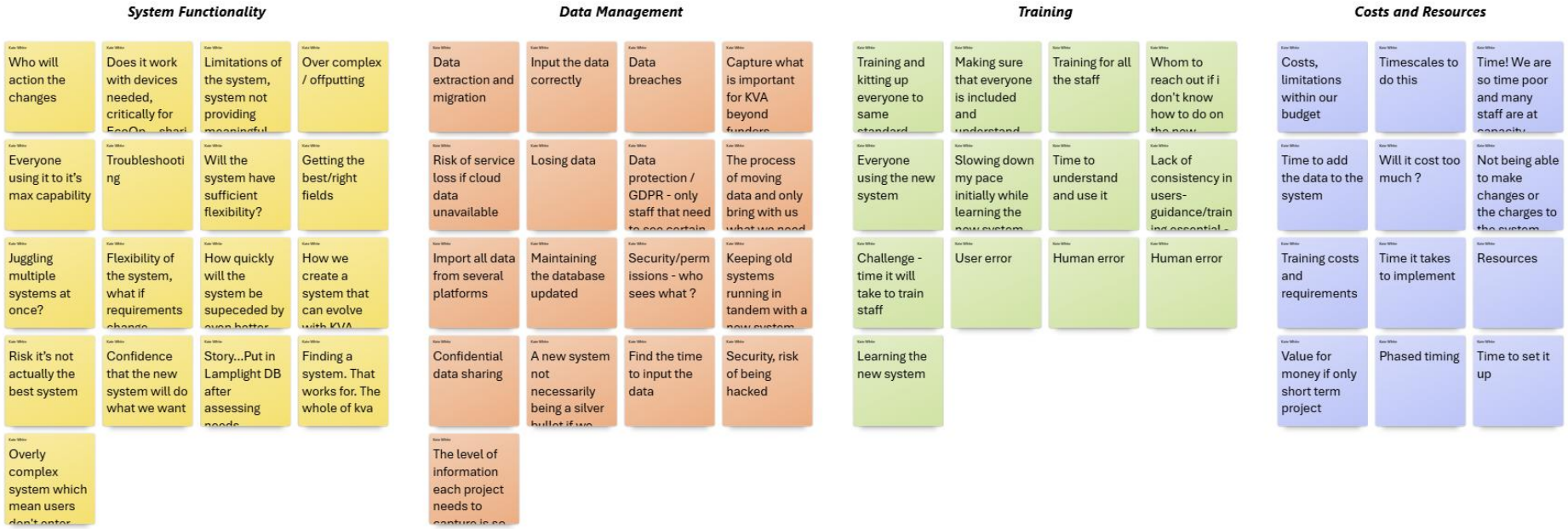


AI categorising

Suggest
ideas and content

Categorise
notes in view

Summarise
note content



Reference: Example AI prompts

- ✓ The following transcript is from a research project about
- ✓ The following quotes are in response to the [question] from a survey with
- ✓ Summarise the key themes in this text
- ✓ Which are the most prominent 3 themes in this list
- ✓ Can you give me three example quotes for each theme
- ✓ List all the quotes that mention [training]
- ✓ Did any of the participants discuss [issue]
- ✓ My hypothesis is [x] Do the responses support or reject this
- ✓ What are the 3 top [recommendations/barriers] identified
- ✓ List 3 positive and 3 negative quotes about x

Example

If you could make one ask of funders, to help you move forward with digital, what would that be?

"Funders, please understand that our organisation cannot operate without our digital infrastructure, which enables us to reach out to those needing our support. Please fund this!"

"Funders, commit to funding digital costs by incorporating it within grant applications."

"Allow us to bring in external expertise to give us capacity to implement an ethical and nature led digital strategy."

Source: Charity Digital Skills Report 2024

Example

Source: Charity Digital Skills Report 2024

AI findings
Funding for digital infrastructure, equipment, and software.
Training and capacity building
Digital staff and expertise
Digital strategy and planning

Manual analysis findings
Understand digital costs and why they matter
Fund digital costs as a core cost
Make it easier to include digital costs in application forms
Support us to develop our organisation

- ✓ Claude
- ✓ Specific and practical asks
- ✓ BUT missed frustration with funders
- ✓ Simplified asks

- ✓ Manual analysis
- ✓ Interprets emotion
- ✓ Brings knowledge of context / audience
- ✓ BUT some confirmation bias

Activity 2: Over to you …

In small groups on your table, discuss:

- ✓ How do you currently analyse qualitative data (tools / process)?
- ✓ What are you stuck on?
- ✓ Any top tips / what have you learnt in the process?

BREAK TIME

3. Deep dive into data

Coding and thematic analysis

- ✓ Confidence to analyse your data systematically

Coding qualitative data

What is coding?

- ✓ Nothing to do with computers or website development (but software / tools can help)
- ✓ Coding is a process to help you organise and digest qualitative data
- ✓ You can do this on paper, on a document or using specialist software
- ✓ You can keep this as simple or as sophisticated as you like
- ✓ You decide how to do it!

- ✓ **Code** = a word or name that has meaning in the context of your project / data (you decide what this is)
- ✓ **Coding** = A process of 'tagging' text to show it is related to a code name
- ✓ **Analysis** = Reviewing quotes tagged with each code to identify key insights

Example: Coding qualitative data

	Q: If you could make one ask to funders, to help you move forward with digital, what would that be?
1	Less restrictive conditions for funding, e.g. reasonable allowance for **core costs** and overheads.
2	understand that **core** / digital **costs** are vitally important to us being able to deliver our services
3	Allow us to receive funding for staff devices, **core costs** and for service user devices. More **unrestricted funding**, if their Due Diligence suggests they will fund us then trust us to use it for what we need to do, our 'bread & butter' provisions that are hard to fund

Codes identified

- ✓ Core costs
- ✓ Funding for devices
- ✓ Funder attitudes
- ✓ Unrestricted funding

Source: Charity Digital Skills Report 2024

Tool: Spreadsheets

- ✓ A column for each code - with a yes/ blank (allows one quote to have multiple codes)
- ✓ Colours (conditional formatting) can show you visually where there are overlaps / few codes applied etc
- ✓ Filter to show the quotes for a specific code (and it shows you a total count)

	Q: If you could make one ask to funders, to help you move forward with digital, what would that be?	Core costs	Devices	Unrestricted	Attitudes
1	Less restrictive conditions for funding, e.g. reasonable allowance for **core costs** and overheads.	Yes			Yes
2	understand that **core** / digital **costs** are vitally important to us being able to deliver our services	Yes			
3	Allow us to receive funding for staff devices, **core costs** and for service user devices. More unrestricted funding. If their Due Diligence suggests they will fund us then trust us to use it for what we need to do, our 'bread & butter' provisions that are hard to fund	Yes	Yes	Yes	Yes

Different approaches to identify codes

Top down

- ✓ Codes directly relates to research questions or interview questions
- ✓ Can also relate to broader sector discourse / sector research
- ✓ You decide them in advance - what you want to know

Bottom up

- ✓ You identify the codes, while / after looking at the data (e.g. a list of quotes)
- ✓ Think about what is important to participants

Reality

- ✓ Both approaches apply, quotes contain multiple codes
- ✓ Do what makes sense for your data and work
- ✓ Important to document your codes and what they include / exclude

An iterative process

Start to apply your codes to the whole dataset and as you go review them

- ✓ Are you applying the same two codes to lots of quotes? = merge
- ✓ Do you have a code with very few quotes? = delete or ignore
- ✓ Do you have a code with a huge amount of quotes = review and re-code
  - ✓ If they are all related, create sub-codes (also called second order or layer coding)
  - ✓ OR if very different, create new codes

Tip: Always document your codes and what they include / exclude (and keep this updated)

Activity 3: Over to you …

In pairs …

Discuss and identify what codes you would apply to the following data …

Pair work: Identify possible codes

Ref	What do you think would improve the sessions?
1	More instruments
2	Less people in the group, the mentors don't have enough time to spend with everyone
3	More drums & better heating in the winter & sessions at the weekend
4	Too much noise from the courtyard
5	Longer sessions
6	My welfare officer told me I couldn't attend them anymore
7	Weekly sessions, once a month isn't enough
8	The room we practice in is next to the rubbish bins, in summer it stinks
9	More choice of instruments & a mentor who knows how to play drums
10	We need a piano!
11	The heating has broken again & could we get drums?

Example solution

Codes:

- ✓ **Instruments** (number/availability)
- ✓ **Mentors** (Number/suitability/training / skills)
- ✓ **Session format** (Length/frequency/ timing)
- ✓ **Rehearsal space** (set up, heating, noise)
- ✓ **Other** (eligibility for sessions, not relevant response)

Ref	What do you think would improve the sessions?	Instruments	Mentors	Venue	Sessions	Other
1	More instruments	Yes				
2	Less people in the group, the mentors don't have enough time to spend with everyone		Yes		Yes	
3	More drums, better heating in the winter, sessions at the weekend	Yes		Yes		
4	Too much noise from the courtyard			Yes		
5	Longer sessions				Yes	
6	My welfare officer told me I couldn't attend anymore					Yes
7	Weekly sessions, once a month isn't enough				Yes	
8	The room we practice in is next to the rubbish bins, in summer it stinks			Yes		
9	More choice of instruments & a mentor who knows how to play drums	Yes	Yes			
10	We need a piano!	Yes				
11	The heating has broken again & could we get drums?	Yes		Yes		

How to analyse this

Look at all your quotes for one code

Identify themes or patterns in what people say and how they say it

Write a set of statements which summarise your findings

Look for

- ✓ Common terms, phrases or words
- ✓ Topics discussed most often
- ✓ Any clear differences of opinion/experiences
- ✓ What people say *and* how they say it (positive, negative, feelings)
- ✓ Any differences for specific groups of participants

Tip: Don't be afraid to draw on your own experience, previous learning, or wider research

Example

Instruments code (added further quotes in green)

- ✓ Instruments are a key source of frustration
- ✓ Complaints include the quality, number and variety
- ✓ This could lead to people dropping out in future.

Recommendations

- ✓ Find funding for the cost of instruments
- ✓ Invest in more high quality drums and pianos
- ✓ Replace older instruments

Ref	Code = instruments
1	More instruments
3	More drums, better heating in the winter, sessions at the weekend
9	More choice of instruments & a mentor who knows how to play drums
10	We need a piano!
11	The heating has broken again & could we get drums?
15	The keyboard is rubbish
16	Could we get drums?
17	More choice of instruments
20	Better instruments

Documenting your analysis

Organise and document what you are seeing in the data

- ✓ Once you have spotted some common themes within a code (See earlier slide on this)
- ✓ Create a new document, internal only
- ✓ List your observations as a set of statements, include details about specific participants
- ✓ Make sure you include any differences or 'outliers' (uncommon responses)
- ✓ Add relevant quotes
- ✓ Then read through all your documents to prioritise and review which are 'key' findings

Pros

- ✓ Great first step once you have completed data collection or summarised interviews
- ✓ Makes it easier to write your report (not starting from a 'blank' page)

Issues

- ✓ Relies on your interpretation of what is important (potential confirmation bias)

Analysis example

Code: Qualitative data (views, why use it)

View 1: Qualitative data brings numbers to life

- P2: Vital in reports, explain meaning, bring data to life
- P4: Stories share lived experience and reality of issues

View 2: Qualitative data is more equitable (a few)

- P1: Surveys are 'extractive', owned by others
- P8: Co-design research with (not on) community

View 3: Quantitative data is better as 'evidence'

- P5: Need data to make their community visible
- P10: Decision makers will take numbers seriously

"Case studies bring our data to life. It humanises data and makes the experiences relatable."

"We don't want our research to be extractive or to replicate the damage caused by existing systems of collecting data."

3. Deep dive into data

Tools for coding qualitative data

- ✓ See everyday and specialist digital tools in action

This section covers…

1. Spreadsheets (advanced use)
2. Documents
3. Paper post it notes
4. Online whiteboards
5. Survey Monkey
6. Specialist coding tools: Quirkos
7. Other specialist coding tools

1. Spreadsheets (advanced use)

Adding codes to quotes

- ✓ **Search** (control+F or filter) to find specific words to code
- ✓ **Counta formula** to find rows you haven't coded
- ✓ **Filter** or **Countifs** formula to identify two codes used together
  - ✓ Merge / delete one if similar
  - ✓ Use to look at 'sub-codes'

Analysis

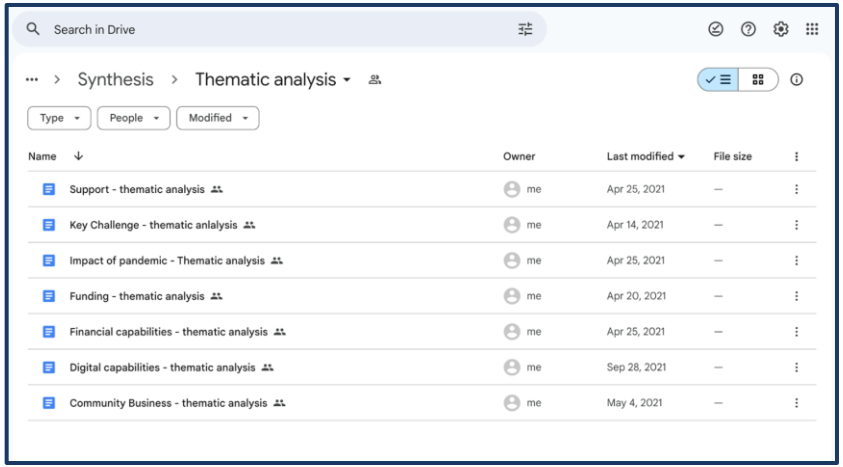
- ✓ Turn on filters for a code to see all the quotes related to it
- ✓ See which codes are most prominent
  - ✓ Colour code the 'yes' to visually spot patterns
  - ✓ Highlight a column to see the count
  - ✓ Use formulas / pivot tables to show counts of codes

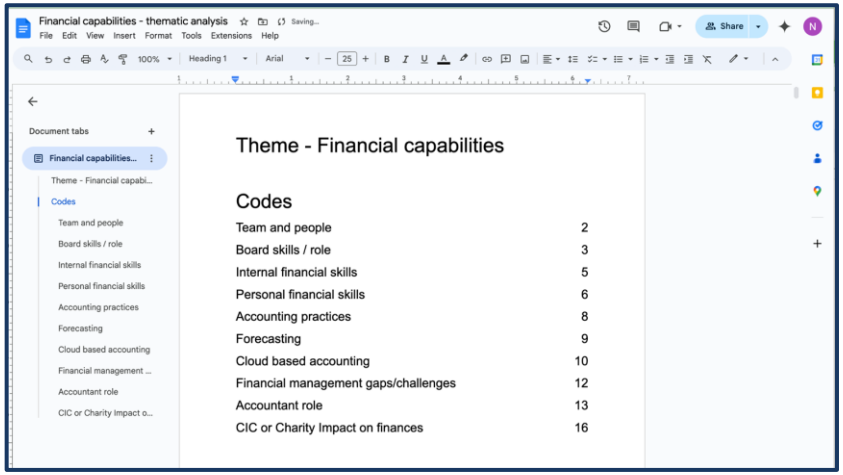
2. Documents

- ✓ Create a new document for each code
- ✓ Copy quotes in to it
- ✓ If you have a lot of quotes, consider creating further groups of quotes (i.e. coding within it). This is sometimes called a subcode or second order code

Tips

- ✓ Use consistent filenames
- ✓ Use consistent document names
- ✓ Keep track of who said what
- ✓ Use 'headings' to structure
- ✓ Create a contents (automatic) to navigate
- ✓ Avoid adding comments (not searchable)





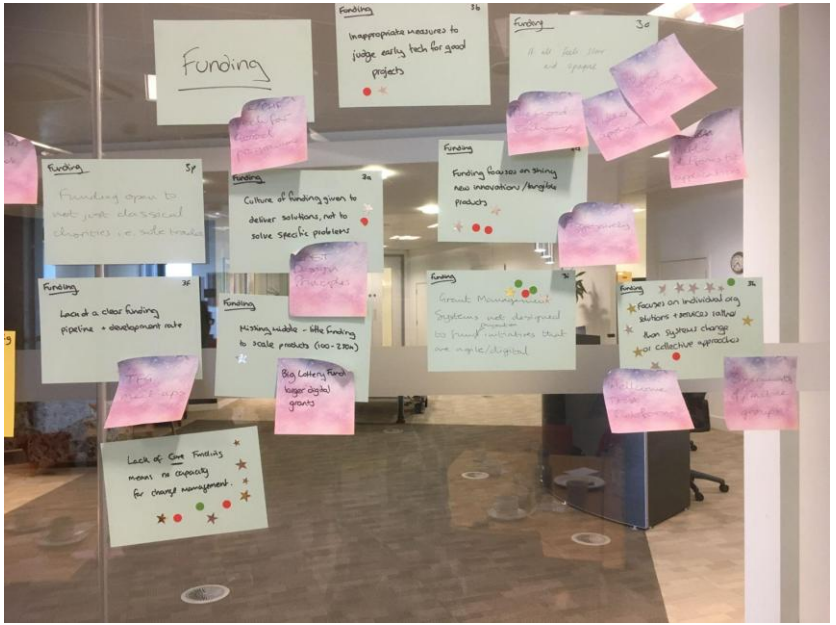
3. Paper post it notes

Group quotes on post-it notes

- ✓ Write quotes on post-it notes
- ✓ As you read them, stick them on a wall in groups
- ✓ Add a new post it to name the group

Take this a step further

- ✓ Add different colour post its for your thoughts
- ✓ Use stickers to vote on key findings
- ✓ Post-it App can transcribe this for you!



Example: Interview

From Promo Cymru

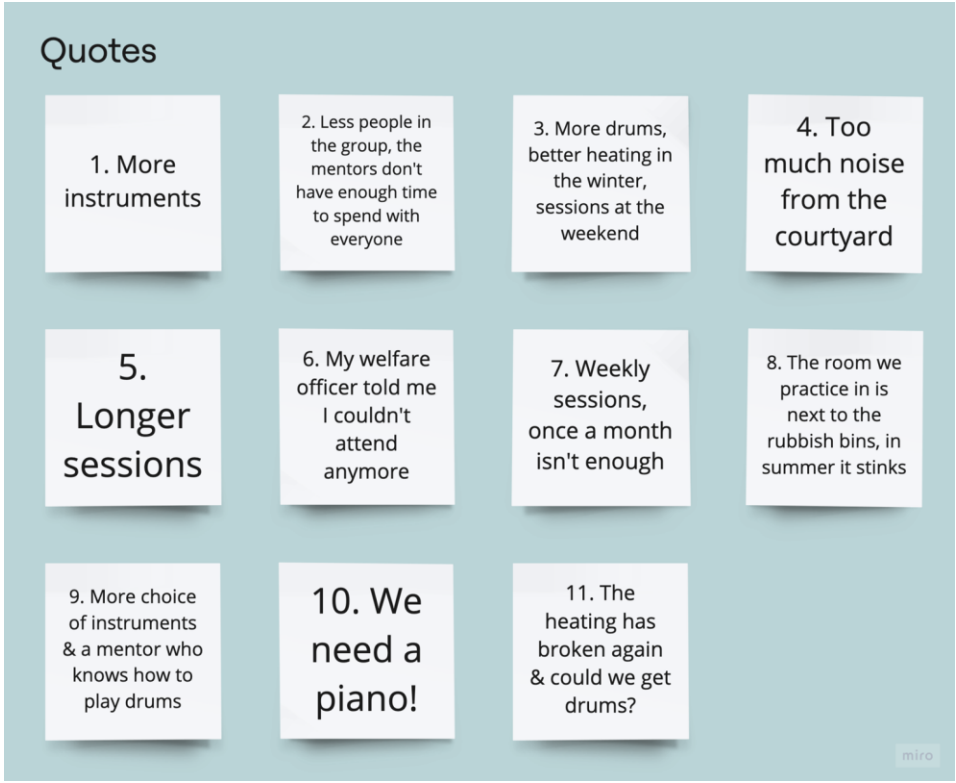
https://promo.cymru/resource/synthesising-user-research-how-to-do-it/

4. Online Whiteboard

Example using Miro

Setup

- ✓ Create a whiteboard
- ✓ Add a box (frame, shown in blue here)
- ✓ Add one quote per post it to the box
  - ✓ You can do this manually or
  - ✓ Copy and paste from a spreadsheet
- ✓ Create a copy of the quotes
  - ✓ 1 to give an overview
  - ✓ 1 ready to group in to codes



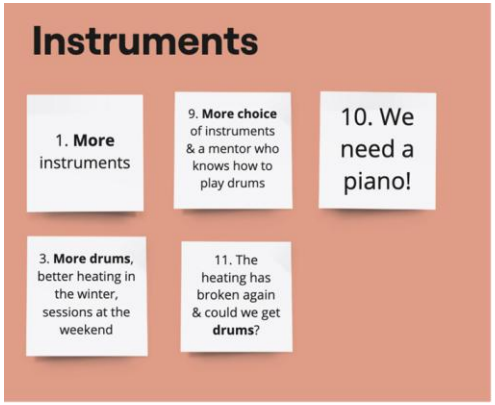
Coding using an online whiteboard

Coding (example using Miro)

- ✓ Create a box / frame
- ✓ Add the code as a title to it
- ✓ Move post it notes to relevant code
- ✓ Copy again if needed for two codes
- ✓ Create further groups within each group if relevant or helpful

Later on

- ✓ You can export to a spreadsheet
- ✓ You can select and copy the frame to paste as an image (like this example)



Analysis using an online whiteboard

Example using Miro

- ✓ Read the quotes in each box
- ✓ Group further if helpful
- ✓ Add findings to new post it notes
- ✓ See visually where most the quotes are

Example (pink post it notes)

- ✓ Biggest issues: instruments and venue
- ✓ Participants want more instruments and a wider choice (drums and piano)
- ✓ Review session timing
- ✓ Review mentor skills
- ✓ We need a new venue

Advanced analysis

Visually show distinct groups

- ✓ Change colours of post it notes
- ✓ See if there are patterns in codes

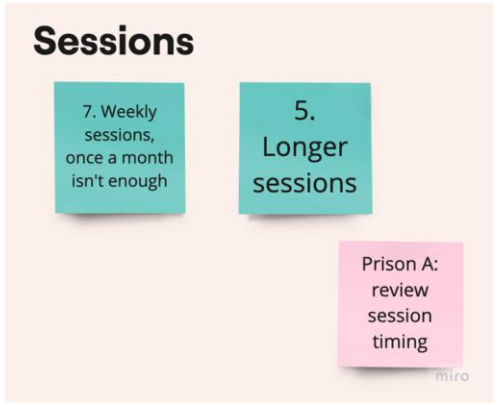
Example (compare two prisons)

Prison A (blue)

- ✓ Review session timing
- ✓ Review mentor skills (drums)
- ✓ Needs more instruments

Prison B (yellow)

- ✓ The venue needs urgent attention
- ✓ Needs more drums and a piano



4. Online whiteboard tools

You can use

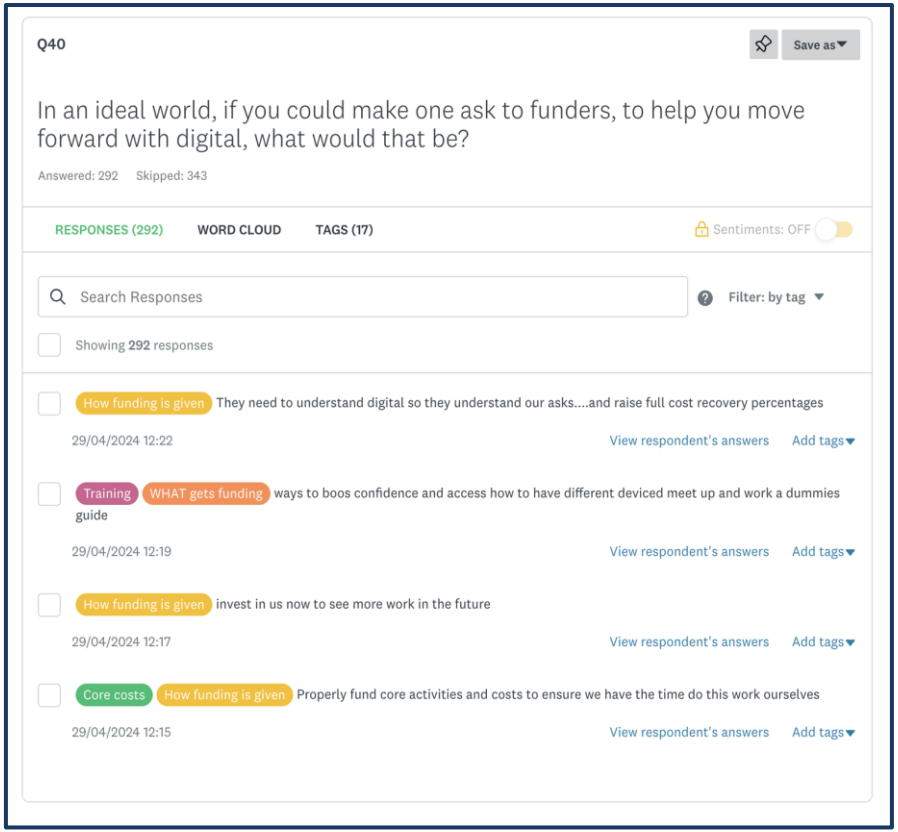
- ✓ Miro Most advanced (includes AI tools)
  - ✓ **Free** for 3 boards, anyone who uses the board must sign-in (become a member) and all boards visible to them
  - ✓ **Paid**: $8/month +VAT for one member (you), unlimited visitors / no sign-in
- ✓ Mural **Free** for 3 boards, unlimited members / visitors ($10/month)
- ✓ Freeform only on Apple, but **free** on iphone, ipad, Mac, can add paid templates

Top tips for free versions

- ✓ Boards are infinite sizes, create multiple project areas on one board
- ✓ Use a free trials / pay for a month and cancel for analysis/ meetings
- ✓ Export to spreadsheet / image and delete board

5. Survey Monkey

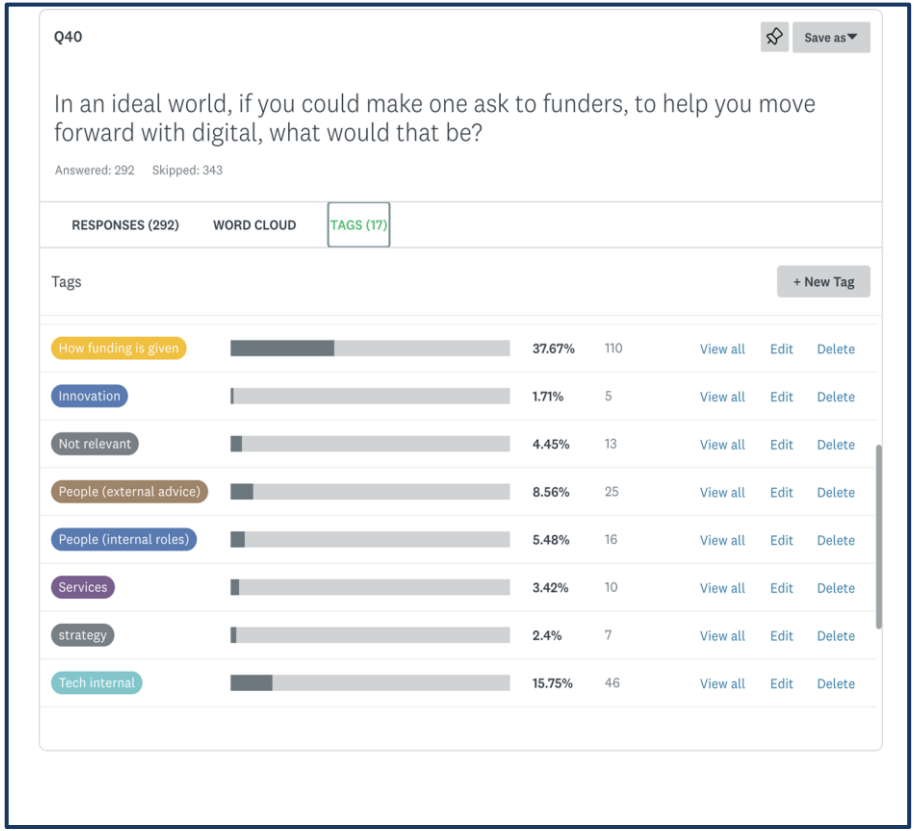
- ✓ Tick the box to add a code to a quote
- ✓ You can search and tick the box to apply a tag to all quotes
- ✓ You can export this later to Excel spreadsheets format



Example using survey monkey

On the tags sheet you can

- ✓ See a summary for each tag
- ✓ It shows you the total number
- ✓ Click to see the quotes for each tag



6. Quirkos

- ✓ Quirkos
- ✓ Easy to use, accessible
- ✓ Extract data easily to spreadsheets
- ✓ Inexpensive (£30 for a quarter)
- ✓ Free trial
- ✓ Easy to learn whilst doing
- ✓ Watch the video tutorials to learn how!
- ✓ Helps you learn how to code data too
- ✓ Link to video here

7. Specialist tools for coding

Specialist tools

- ✓ MaxQDA (AI assist built in, can suggest codes, summarise, blog post here)
- ✓ Nvivo
- ✓ Atlas
- ✓ CoLoop (An Ai based tool, has a chat function to question your data, read this blog post)
- ✓ **Consider**
  - ✓ Likely more sophisticated than you need!
  - ✓ Complex and expensive pricing
  - ✓ Pricing and functions are changing (esp with AI)

Free tools

- ✓ Taguette (open source, free)
- ✓ **Consider**
  - ✓ Open source tools often start and close
  - ✓ Always extract / backup data

When to code data (and approach)

Systematic coding…

- ✓ Lots of interviews or quotes
- ✓ Wide ranging responses
- ✓ It is a large project
- ✓ Plan to collaborate
- ✓ Time /capacity available
- ✓ Dedicated budget, funding
- ✓ Clear purpose / reason

Light touch coding…

- ✓ Small amount of data
- ✓ Lots of data
- ✓ Literal responses
- ✓ Distinct responses
- ✓ Some budget / funding
- ✓ Limited time
- ✓ Interesting (nice to have)

Do not code…

- ✓ Small amount of data
- ✓ Poor quality data
- ✓ Responses lack relevance
- ✓ No budget / funding
- ✓ No time
- ✓ No use case / clear purpose

4. Moving forwards

Plan your next steps

- ✓ How you want to approach your analysis

Research questions

Research questions **usually focus on people, problems or service experience.**

They are not the same as your interview or survey questions

- ✓ They **frame why** you are asking questions
- ✓ They **guide** what your analysis will find out.

We often skip this, because it is **implicit**. BUT it is important to revisit before analysis. It helps you

- ✓ **Stay focused** when you have a lot of data (decide what to ignore)
- ✓ **Help decide** which findings to prioritise and share (interesting vs vital)
- ✓ **Ditch the analysis** if it's not needed, possible or answerable
- ✓ **Engage stakeholders** in meetings /reports, communicate why this is important

Further reading: A great blog post on the difference between research questions and interview questions.

How to define your research questions

Good questions are

- ✓ **Open ended** exploratory questions
- ✓ **Specific** to your context / work
- ✓ **Relevant** to your data and what you asked
- ✓ **Possible to answer** with the data you collected
- ✓ **Short and concise** so they are useful and memorable
- ✓ **Focused** on one issue per question so they are easier to answer

We should have a set of research questions (often 3-5).

If you have too many, you are probably writing the questions you want to ask directly of people.

You can retrospectively work out your questions!

Example research questions

- ✓ What are people's motivations for coming to us for help?
- ✓ What problems do our volunteers experience when trying to volunteer for our organisation?
- ✓ What are the barriers to using our service?
- ✓ What do people do as a result of using our service?
- ✓ What issues are emerging in our borough, according to our clients?
- ✓ Why are people dropping out of our service?

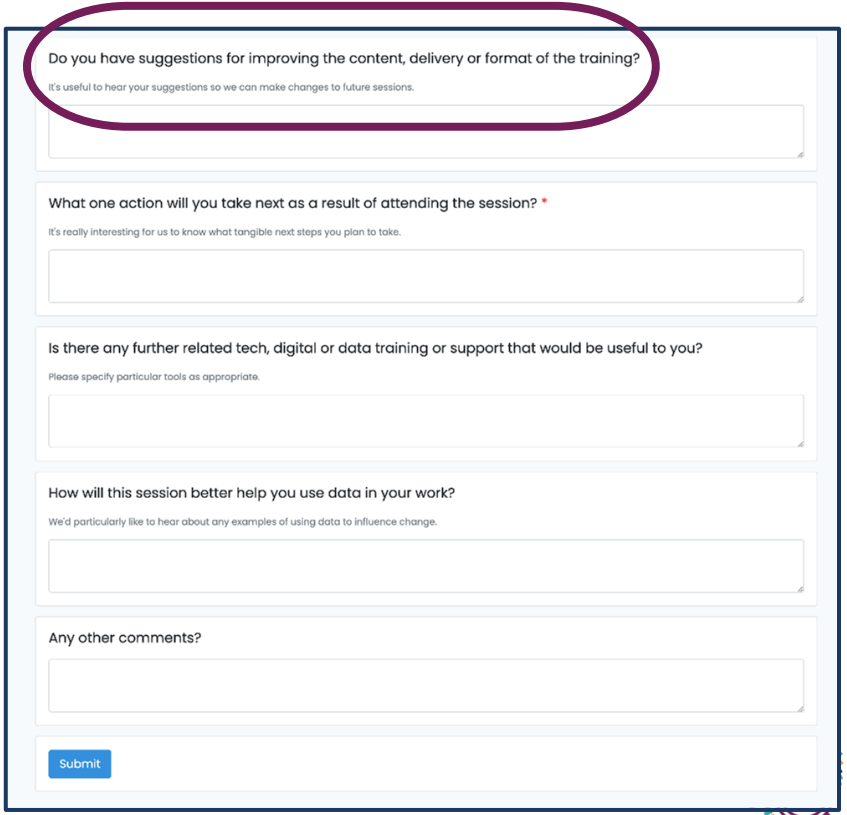
An example feedback form…

Research Purpose

- ✓ Improve our training

Research questions

- ✓ What improvements do participants want to make to a specific training session?
- ✓ Are there common improvements participants ask for:
  - ✓ Across all of our training this year?
  - ✓ Across all training delivered by person x?
  - ✓ In the last 3 months since we moved to a new approach?

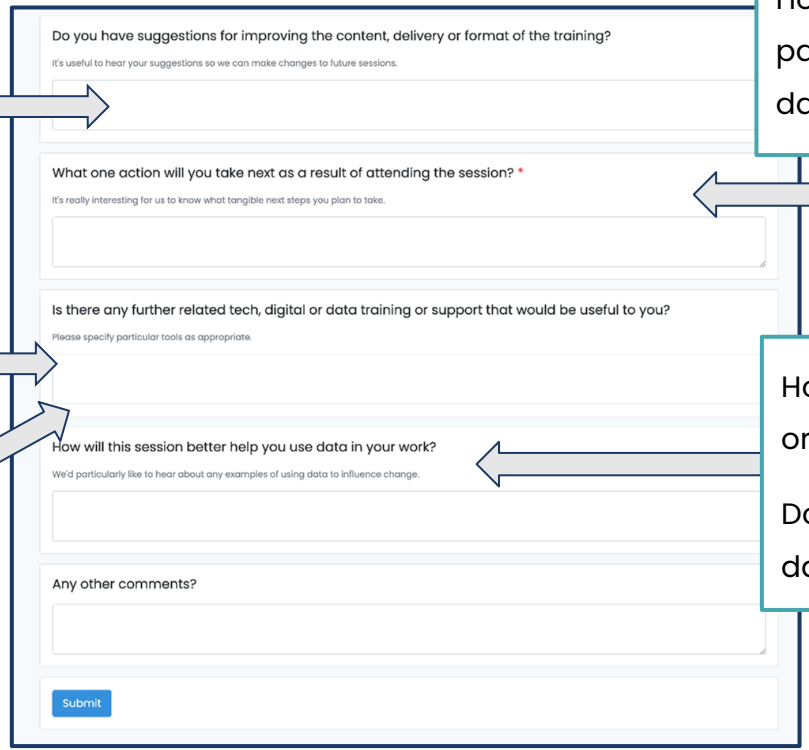


Example research questions

How can we improve our training?

Are there emerging needs for training and support?

What are the gaps in participants skills and knowledge?



How does our training help participants to better use data in their work?

How does our training benefit organisations?

Do we help organisations use data to influence change?

Example questions and codes

Interview guide

Tell me a bit about you and how you came to use this service?

Tell me about your experience?

Did your situation improve?

What did you get out of using the service?

How could we improve the service in future, for people in your situation?

Research question and codes

Why do people come to our service?

- ✓ Self-directed motivations
- ✓ Push factors
- ✓ Situations they are in

What do participants get out of our service?

- ✓ Confidence
- ✓ Skills
- ✓ Improvements to situation

What improvements are needed or suggested?

- ✓ Finding service
- ✓ Sign up
- ✓ Sessions

Start your plan: Look at your data

Always **start your analysis** by diving into your **data** (or a small sample) and look at:

- ✓ How much data do you have?
- ✓ How complete is the data? Are you missing a lot of responses?
- ✓ Do the responses look relevant, interesting and accurate?
- ✓ What do you think the data might tell you about or help you decide / do?

Most importantly think about and decide

- ✓ Can you actually use this data to answer the research questions you have?
- ✓ Have confidence to ditch the data if you can't!
- ✓ How can you make the analysis straightforward and doable?
- ✓ What you want to do to move forwards with your analysis

Create a research plan

A worksheet and further reading

Next steps: Your research plan

Contents:

Purpose	
Your research questions (3-5)	
Describe your data	
Analysis approach	
Informed consent	
Data logistics, safety and security	
Collaboration	
Keeping participants involved	
Challenges and next steps	

Your plan: Purpose

Purpose	*Example: The findings will help us*
• Why you are doing this research • What you hope to do or change as a result of the findings • How you plan to share and communicate the findings	• *Improve our services* • *Demonstrate our impact* • *Make the case for funding (e.g. where we uncover an emerging need)* *We will include our key findings, with quotes and stories in:* • *Our annual report* • *Presentations to the local authority* • *Information we share with funders*

Your plan: Research questions

Your research questions (3-5)	Example:
• What do you want to find out? • Why did you ask specific Qs in forms / interviews • What answers you will find in your data?	• What do participants value about our service? • What improvements do participants want to see? • How can we better support participants?

Your plan: Data overview

Describe your data • How much do you have? What is the quality like? • What format is it in? • Any implications for analysis?	Example: All the responses are saved in a spreadsheet, with 500 rows. Approximately 200 people responded to the question. The responses are relevant, complete and wide ranging. They will be helpful to analyse as a result.
Analysis approach • How will you analyse your data? • What tools are you thinking of using?	Example: I will read a sample of the quotes in-depth and develop a set of codes, based on common responses. I will apply these codes to all of the quotes. I will summarise the key views expressed and compare differences between people who are 'one off' or 'intensive' users of our services

Example: Starting a research plan

Research questions

1. How can we improve our service and prevent people from dropping out?
2. What problems do people encounter when using our service?

Analysis process

- ✓ Data: 15 interviews (30 mins -1 hour each) with people who used our services, 10 dropped out
- ✓ Use OtterAI to transcribe interviews and write summary
- ✓ Highlight key quotes about barriers / why people drop out
- ✓ Code each quote to a key stage in our service (e.g. application, first meeting, mid-review, exit)
- ✓ Review quotes for each code and summarise key problems
- ✓ Possibly use a Whiteboard for all quotes or to visualise the service journey with example quotes

Your plan: Data housekeeping

Informed consent • How did you get informed consent? • Any anonymity, ethical or sensitive data issues? • See the NCVO Guide to informed consent	Example: We gave informed consent information at the start of the survey (add link to document this). We can use quotes anonymously and thank participants in the report.
Data logistics, safety and security • How and where will you store data? • What actions will you take to keep it safe? • When will you delete the data? • Check the GDPR legitimate purposes	Example: Data is stored on a shared drive, in a folder only accessible to members of the research team. It will be deleted in December 2025. All quotes will be analysed anonymously.

Your plan: Think about end goals

Collaboration • How can you keep the wider organisation involved? • Who are the key stakeholders? How can you engage them and when?	Example: Internal stakeholders (team, leaders): Team coding working, present plan at all staff meeting, discuss early findings with leadership team External funders: Call to discuss what they want to find out and ideas for outputs
Keeping participants involved • How will you share updates and findings?	Example: Our participants have some interest in what we do with the findings, but don't want extensive updates. I will share email updates with our early findings and invite feedback. I will host a final workshop for participants to share the findings and involve in next steps

Your plan: Think about end goals

Challenges and next steps ● Is anything preventing you from moving forward? ● Any gaps in tools, skills, confidence? ● Ideas to move forwards	Example: Administration time to enter quotes - can team PA support on this? Need confidence in analysis - will involve the team to sense check findings

Individual exercise (5-10 mins)

Start your plan!

- Your **research questions** (max 5)
- What you want to do next to move forwards?

Further reading

Resources we touched on in the session

About informed consent

Informed consent = What you told a participant about their involvement and your plan to use their responses

- ✓ Review key documents (e.g. sign up form, survey introduction, terms and conditions, interview Qs)
- ✓ Did participants agree to be quoted or do you need to quote them anonymously?
- ✓ If no consent, do you have legitimate purposes for collecting and using data?
- ✓ Do you have any sensitive data or protected characteristics to treat extra carefully?

Resources

- ✓ Guide to Informed consent (by Think Social Tech on behalf of the Open Data Institute)
- ✓ NCVO Guide to informed consent
- ✓ GDPR legitimate purposes (Information Commissioner's Office) for storing and using data

About data storage and safety

Organise and store your data, make it **safe**, make it **anonymous**

Key steps

- ✓ Download and save data from relevant digital tools for analysis
- ✓ Create folders, a folder structure and file naming conventions
- ✓ Back up your original dataset
- ✓ Delete irrelevant and identifiable data (e.g. on spreadsheets)
- ✓ Transcribe / summarise interviews which are in audio format
- ✓ Give participants pseudonyms or codes
- ✓ Remove information which could be used to re-identify someone
- ✓ Check and restrict access to data / folders (at least two people)

Writing interview questions

Key steps

- ✓ Look at your research questions (or write some!)
- ✓ Write down any question you could ask a participant, that would help you answer your research Qs.
- ✓ Group your questions by theme and remove or merge similar ones.
- ✓ Depending on what you're asking you might fit 6-10 general questions into a 30 minute interview.
- ✓ Write your questions in a way that people will understand. Use natural language.
- ✓ Begin with an easy or general question. This will help participants warm up to the interview.
- ✓ Add prompts for each question. These will help when you need more detailed information or a participant struggles to answer a question.
- ✓ Mark the most important questions. That way you can prioritise them if you run short of time.
- ✓ Test your questions by reading them to a colleague while asking what they think each one means.

Using a Knowledge Board to plan and analyse research

Set out your research Qs:

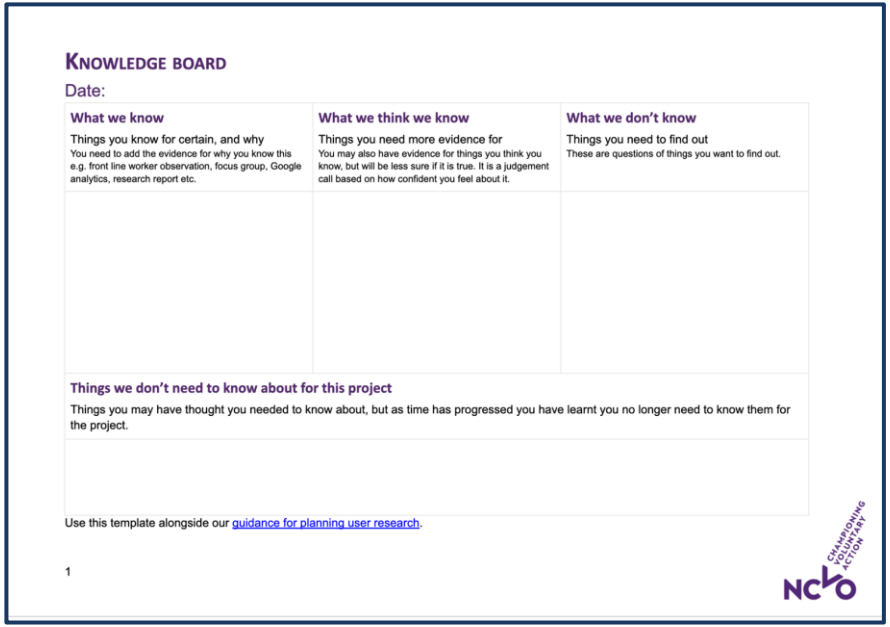
- ✓ What you know (and have evidence for)
- ✓ What you think you know (assumptions)
- ✓ What don't know (questions)

Pros

- ✓ Purpose led / practical
- ✓ Helps focus
- ✓ Great to document decisions
- ✓ Great to do as a team

Resources

- ✓ NCVO knowledge board template
- ✓ CAST guide to a knowledge board



KNOWLEDGE BOARD

Date:

What we know	What we think we know	What we don't know
Things you know for certain, and why You need to add the evidence for why you know this e.g. front line worker observation, focus group, Google analytics, research report etc.	Things you need more evidence for You may also have evidence for things you think you know, but will be less sure if it is true. It is a judgement call based on how confident you feel about it.	Things you need to find out These are questions of things you want to find out.

Things we don't need to know about for this project

Things you may have thought you needed to know about, but as time has progressed you have learnt you no longer need to know them for the project.

Use this template alongside our guidance for planning user research.

1

CHAMPIONING VOLUNTARY ACTION ARY

NCVO

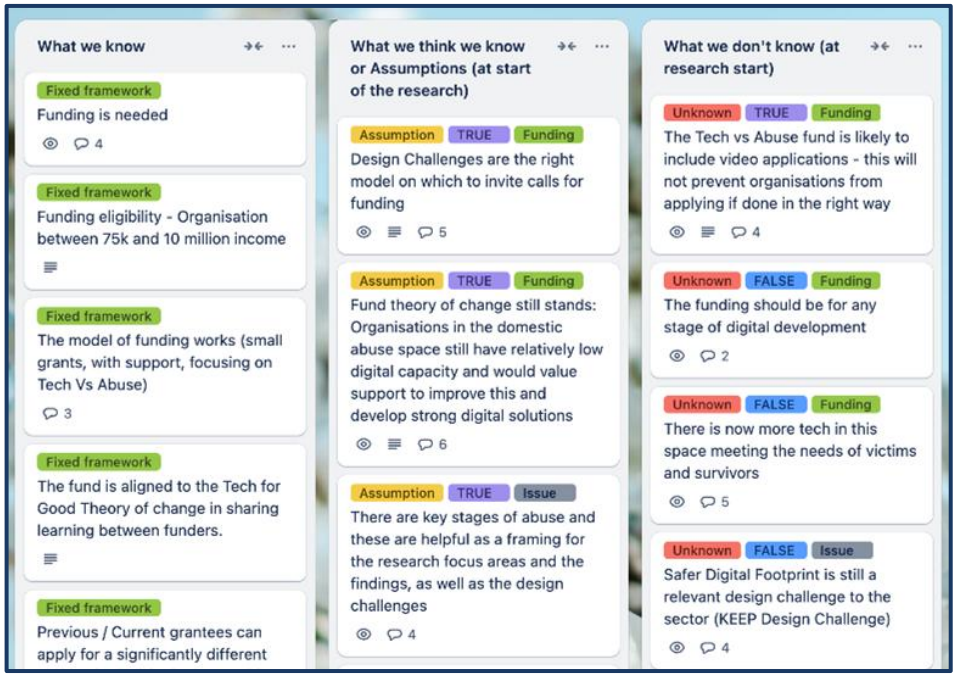
Example: Knowledge board on Trello

Analysis process

- ✓ Go through each data source
- ✓ Add relevant quotes to each card
- ✓ Open each card and:
  - ✓ Review quotes
  - ✓ Add your reflections
  - ✓ Add label to show decision

Challenges

- ✓ Lose sight of the data in cards
- ✓ Lose site of context



Source: Trello board (public), Comic Relief blog

When not to code

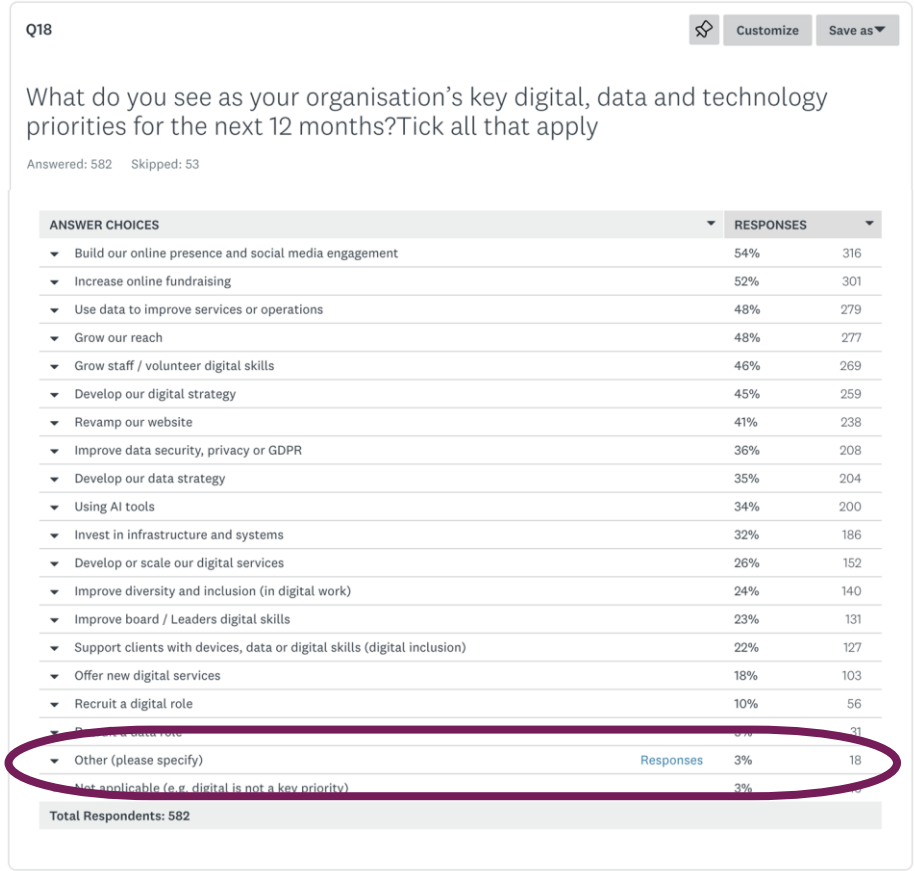
A survey with an open response to a question on priorities

Possible value:

- ✓ How do organisations describe their key priorities this year
- ✓ Have we missed any priorities?

Decided not to code this:

- ✓ Only 18 of 582 responses (3%)
- ✓ Responses are varied
- ✓ Mainly show issues with question



Q18

Customize | Save as

What do you see as your organisation's key digital, data and technology priorities for the next 12 months?Tick all that apply

Answered: 582 Skipped: 53

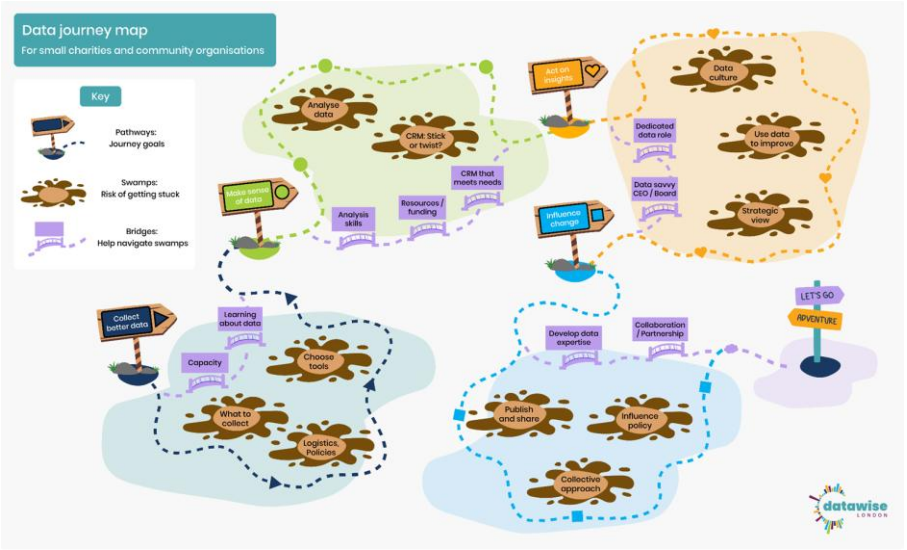
ANSWER CHOICES		RESPONSES	
Build our online presence and social media engagement		54%	316
Increase online fundraising		52%	301
Use data to improve services or operations		48%	279
Grow our reach		48%	277
Grow staff / volunteer digital skills		46%	269
Develop our digital strategy		45%	259
Revamp our website		41%	238
Improve data security, privacy or GDPR		36%	208
Develop our data strategy		35%	204
Using AI tools		34%	200
Invest in infrastructure and systems		32%	186
Develop or scale our digital services		26%	152
Improve diversity and inclusion (in digital work)		24%	140
Improve board / Leaders digital skills		23%	131
Support clients with devices, data or digital skills (digital inclusion)		22%	127
Offer new digital services		18%	103
Recruit a digital role		10%	56
Other (please specify)	Responses	3%	18
Not applicable (e.g. digital is not a key priority)		3%	

Total Respondents: 582

Source: Charity Digital Skills Survey 2024

Tools for presenting qualitative data

- ✓ Quotes
- ✓ Case studies
- ✓ Journey Maps
- ✓ Infographics
- ✓ Charts



Good tools: [Canva](), [Datawrapper](), [Miro]()

Previous tips shared

Discussions

- ✓ What else to do with data (audience other than funders)
- ✓ How to get started with analysis
- ✓ Being clear on the purpose
- ✓ How to use case studies

Interviews

- ✓ Record interviews (phone audio, zoom) (ask for consent)
- ✓ OtterAI to transcribe (and summarise)
- ✓ TurboScribe to transcribe
- ✓ Summarise recordings / transcript asap after interviews

Survey questions

- ✓ Test survey Qs, watch people fill them in. Revise your Qs!

Analysis

- ✓ Analysing data across the whole organisation isn't necessarily helpful - very different services
- ✓ You don't have to analyse data just because you have it
- ✓ Volunteers can help listen to interviews and identify quotes
- ✓ Use Excel or an online whiteboard to capture and store quotes

Final takeaways

To do after this session

Now

- ✓ Fill in our feedback form!

Soon

- ✓ Create a research plan
- ✓ See worksheets at the end of the deck
- ✓ Look through the resources at the end

To remember

- ✓ Look at your time, the data you have and your purpose
- ✓ Design a process which works for you - You can keep it simple or make it more advanced!

Thank you for listening

Kate White, Superhighways
Clare Chamberlain, Superhighways

info@superhighways.org.uk
@SuperhighwaysUK