Turning conversations into data

Action Health Inequalities Training Series

What does Superhighways do?

Superhighways helps small charities and community groups gain essential digital and data skills backed by the right tech to achieve their goals.

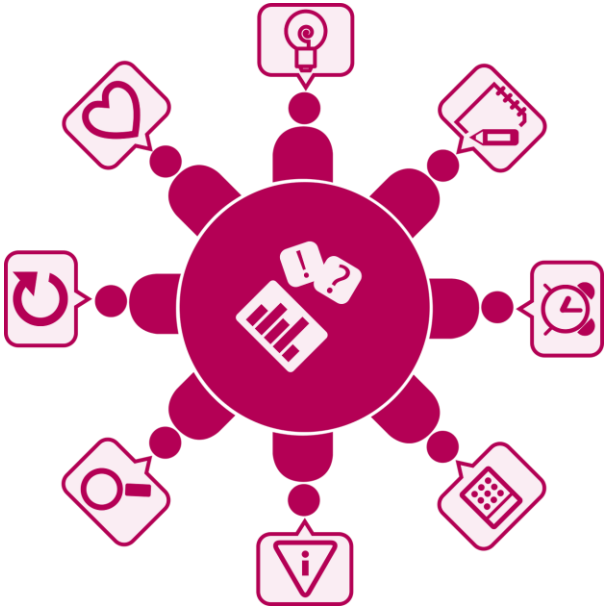
Today’s goal

Giving you the **confidence to transform community insights** and **codesign outputs** - quotes, case studies, interviews, focus group data and feedback - into **usable, actionable evidence** so you can **influence services and local health priorities.**

Agenda

Intro: Community insights Goals and outcomes
Part 1: Foundations Collecting community insights for a specific goal
Break
Part 2: Quantitative vs qualitative data Definitions and differences **Part 3: Dive into data** Methods for converting qualitative data into themes and findings
Break
Part 3: Dive into data Tools for converting qualitative data into themes and findings **Part 4: Research Plan** A tool for planning your approach including ethical data handling & consent **Part 5: Communicating your evidence** Plan your approach to sharing your findings **Close: One take away**

But first…the why?



What goals do you have for collecting and analysing community insights?

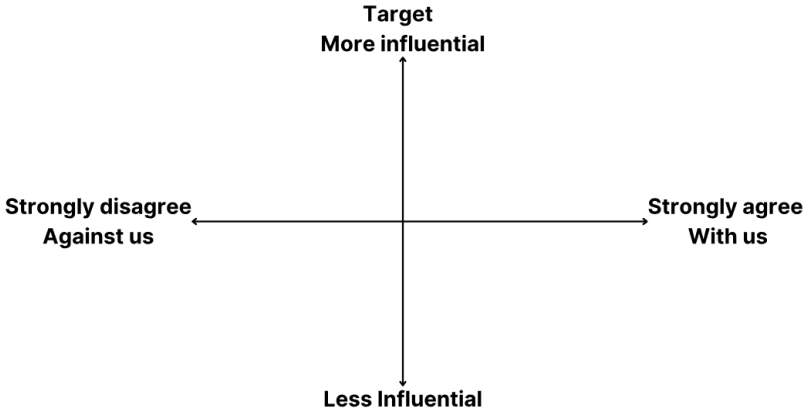
- ✓ Individually pause and reflect on the question
- ✓ Join a breakout room in a pair
- ✓ Answers in chat when you come back to the main space

Check out some Liberating Structures engagement methods

Who are you trying to influence?

Take a look at the Sheila McKechnie Foundation's resources:

- ✓ Use the Changemaker's Toolkit
- ✓ Watch their film 'Change Unfolding'
- ✓ Access their training and resources including their helpfu guide to Navigating charity campaigning for trustees



North East London Health & Care Partnership

Strategic priorities:

- ✓Babies, children & young people
- ✓Long term conditions
- ✓Mental health, learning disabilities and autism

Cross cutting themes

Co-production

Improved health outcomes as residents build their confidence and ability to positively manage their own health and wellbeing.

Health inequalities

Dedicated health inequalities funding has been provided to each place-based partnership to lead locally determined programmes to reduce health inequalities within their local communities.

Our case study for today

Care Share Eat (CSE) a local community organisation bringing residents together to cook and share a meal, with a new community gardening project growing vegetables.

We know the challenges of our community in relation to health outcomes. We can share our insights with health partners so they can understand local challenges and adapt services to meet local need.

We are best placed to continue this work to help identify future challenges – but we need to be sustainably funded.

Our hunches

Providing connection for people in their local area improves their health & wellbeing

1. Foundations

Collecting conversational data

1. What community insights do you collect?

2. How are you collecting this (what methods)?

Please share in Chat

Ways to collect data

- ✓ Routine data collection
- ✓ Surveys
- ✓ Observations
- ✓ Interviews
- ✓ Focus groups
- ✓ Codesign events
- ✓ Creative methods

Data collection journey map for CSE

1

Social Prescriber referral form

- Basic details about individual including contact details and reason for referral

2

Wellbeing assessment form

- One to one meeting with individual before first attending a session
- Further demographic data capture

3

Weekly routine data collection

- Attendance register
- Mood scale for attendees – on arrival and when leaving
- Debrief with volunteers – observational data

4

Quarterly health outcomes evidencing

- Online & paper survey for all attendees of Care Share Eat & the Gardening club
- Sample interviews

Health outcomes data collection matrix

Why collect it (Purpose / goal)	What you collect (Data points & examples)	How you collect it (Methods)	How you share it (Influencing)
Influence local services in favour of clients' needs (positive health outcomes)	Demographics; baseline wellbeing; presenting issues; referrals; postcode/LSOA	Registration forms; consent forms; GP/referrer forms; baseline scales	Client profile summaries; LSOA/PCN maps; 1-page influence briefings
Evidence unmet need & barriers to access/outcomes	Engagement metrics; waiting times; barriers; access needs	CRM records; sign-in sheets; polls; observations	Heatmaps; quotes; pathway diagrams; improvement recommendations.
Demonstrate service impact (wellbeing & care pathways)	Pre/post outcomes; goal attainment; self-efficacy; reduced primary / secondary care	Pre/post surveys; follow-up calls; case reviews; interviews/ focus groups	Before/after charts; case studies; distance-travelled summaries
Support equitable commissioning (EDI & place-based)	Voluntary EDI; postcode/LSOA; condition clusters; subgroup themes	Surveys; workshops; photo-voice; participatory mapping	Equality profiles; LSOA/PCN summaries; JSNA-aligned evidence

Types of programme outcomes

Type	Describes changes in people's....	Example - Care Share Eat
Knowledge	....understanding and awareness	Better nutrition
Attitude	....beliefs, values, thoughts, feelings, motivations	Increased confidence
Behaviour	....actions, conduct, habits, participation, engagement	Changing routines
Skills	....practical, educational, interpersonal, emotional	Growing vegetables
Condition	....personal state, situation, circumstances	Less anxiety – ability to join in
Opportunity	....availability of appropriate programmes, accessibility, inclusion	Volunteering

What tools are you using?

What tools do you use for your data collection?

Go to

www.menti.com

Enter the code

1691 5358

Or use QR code

✓Or click this link: https://www.menti.com/alpihgjtudjn

Digital tools for data collection

- ✓ Online forms, polls & surveys

SurveyMonkey Google Forms Microsoft Forms ZOHO WUFOO Typeform Jotform Mentimeter

Read our blog post…

Free – too good to be true?

Mentimeter — Up to 50 responses p/m

Typeform — 10 questions, 10 responses p/m

JotForm — 5 forms, 100 responses p/m, 100MB storage

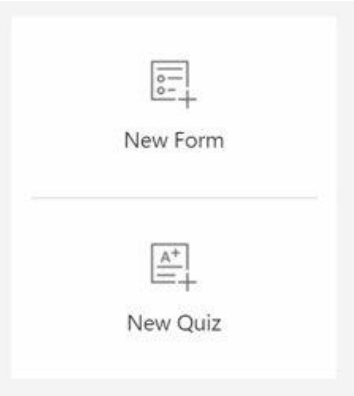
SurveyMonkey — 10 questions, view only, 25 responses p/survey And no download options!

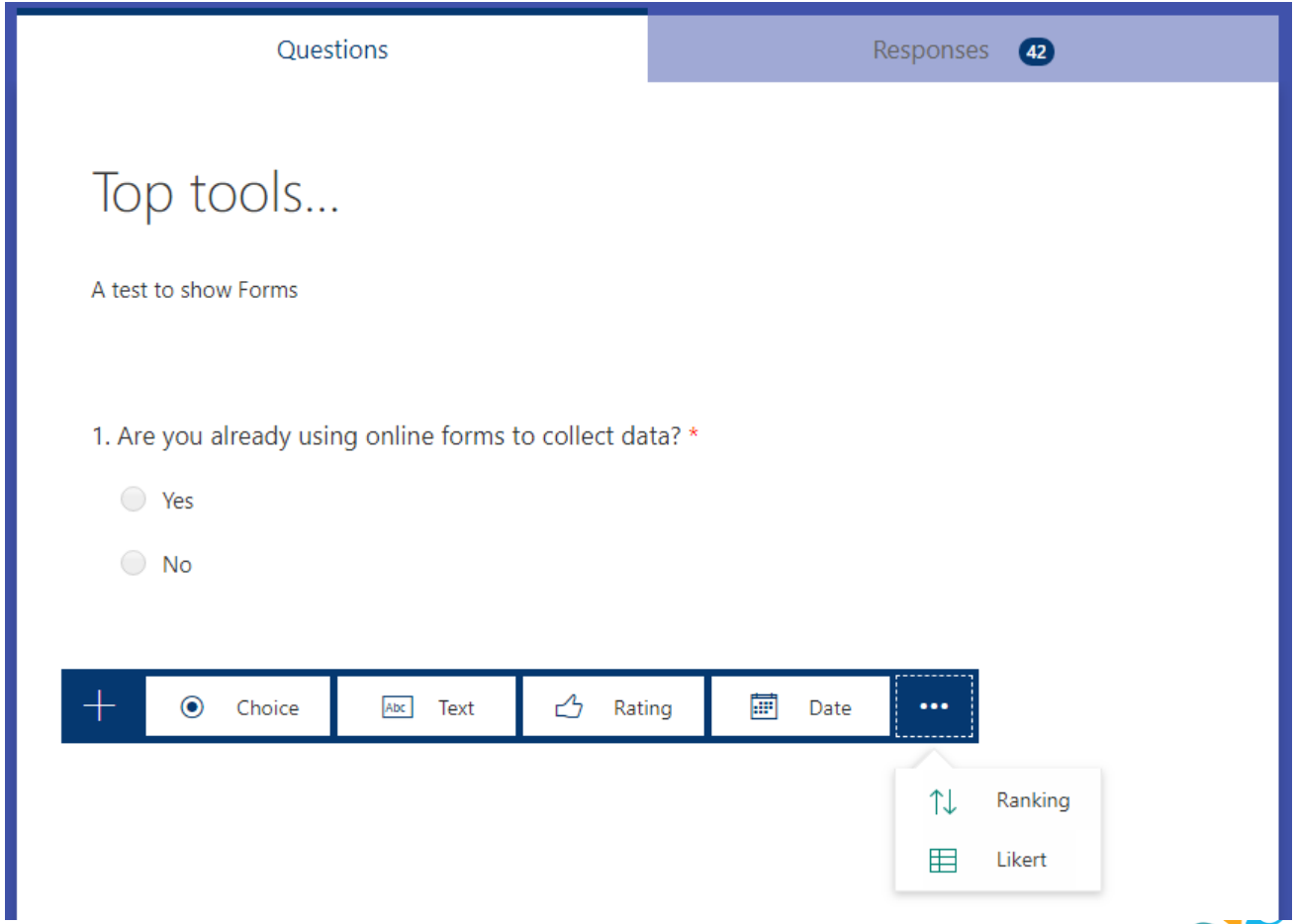
SmartSurvey — 15 questions, view only, 100 responses p/m

** M365 & Google Forms are free – consider using these in your **organisational accounts** by default*

Setting up your survey

Forms





Sharing your survey

Send and collect responses

Anyone with the link can respond

https://forms.office.com/Pages/Respon

Copy

Share as a template

+ Get a link to duplicate

Share to collaborate

+ Get a link to view and edit

Accessing the results

Questions

Responses 57

Top tools...

57	00:51	Active
Responses	Average time to complete	Status

...

View results

Open in Excel

1. Are you already using online forms to collect data?

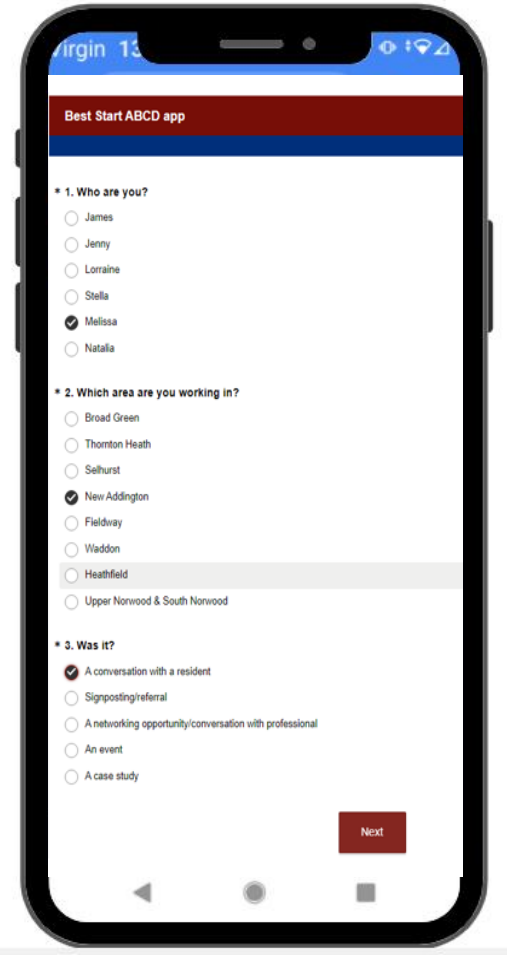
More Details

Yes	25
No	32

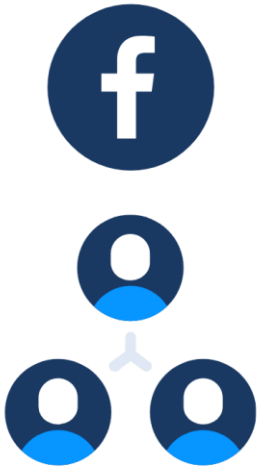
Mobile data collection

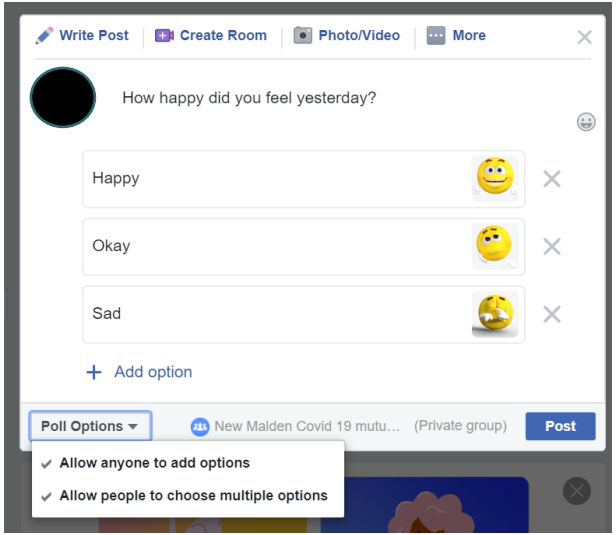
Add form shortcuts to your phone Homescreen…

Don’t forget speech to text

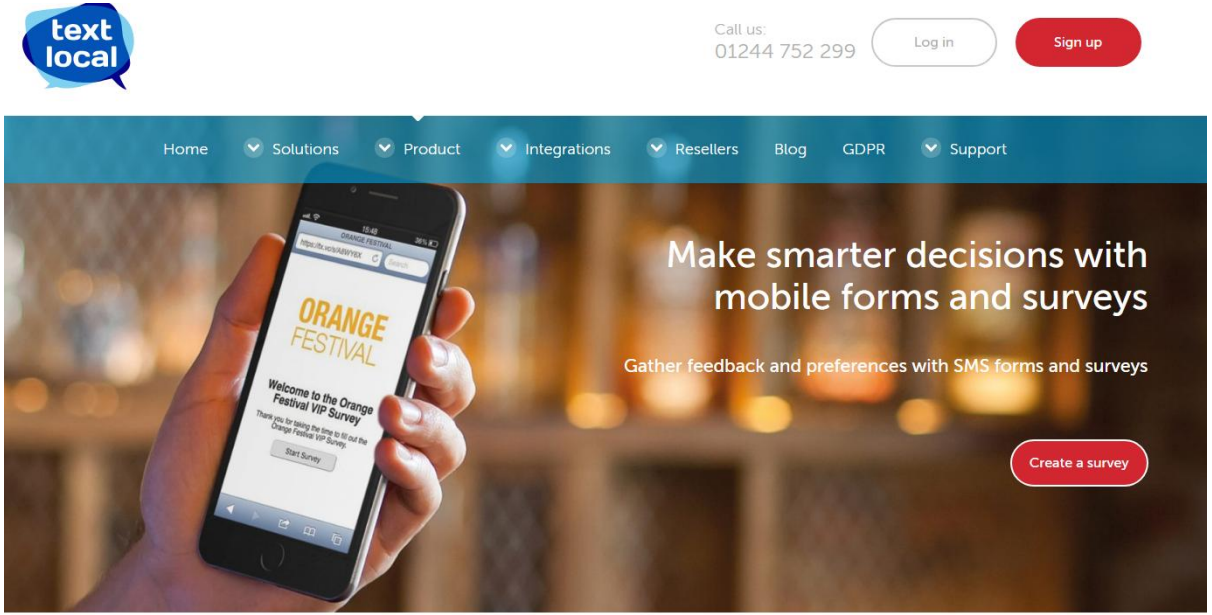


Who’s on social media?





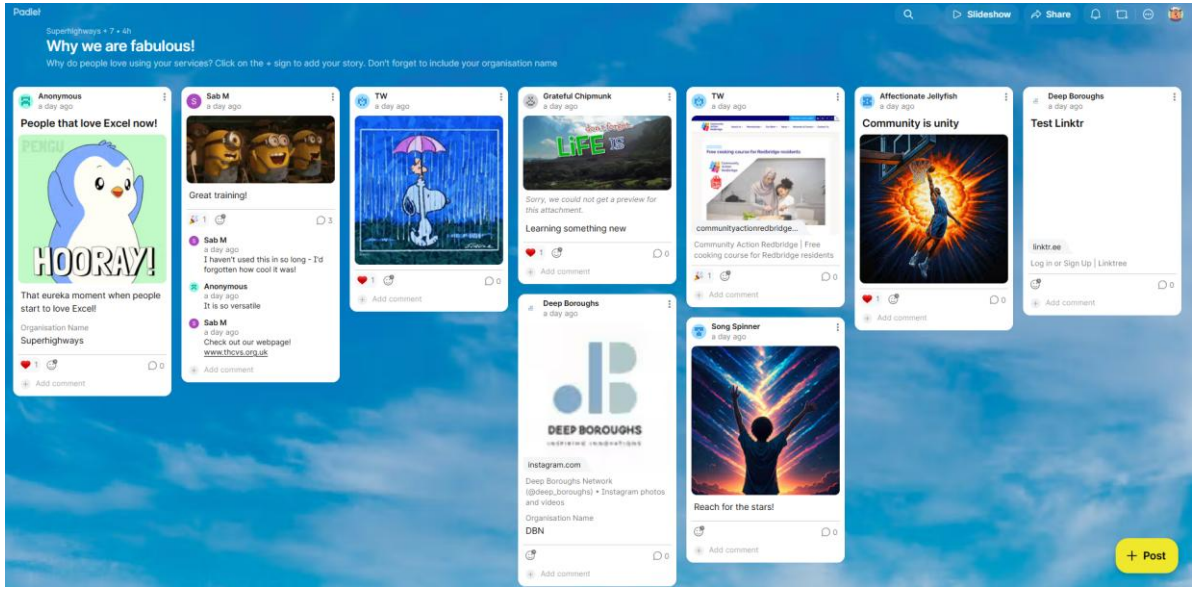
Data capture with SMS



Creative story gathering

Using Padlet for audio, visual and diary story capture

Padlet results



✓ Link to our Padlet (will be deleted shortly but feel free to have a play and add information)

Break time

10 minutes

Digital tools for data collection

- ✓ Audio capture

Giving people a voice

audioBoom

SOUNDCLOUD

Semi-structured interviewing for exploration and insights

- ✓ A scheduled activity
- ✓ Using an **interview guide** (topics, questions & prompts)
- ✓ Interviewer is prepared and in control, but not controlling
- ✓ Max 1 hour

You might not use the audio as audio

Balcony Blog #1 - Sharon

In this blog series, we interview Hackney Wick residents about their lives under lockdown

Hi Sharon! What can you see from your balcony?

It's quite nice today. I can see for miles from my balcony. Victoria Park and over to Canary Wharf in one direction and just blocks of flats over the other side of Wick Road. All this is the Big Local area.

What does your day look like?

The days are different. We can't run the clubs and bingo that we used to run in Gascoyne Hall. That took up lots of my time. We had craft club on Monday, the community lunch on Wednesday and Bingo on Thursdays- I might see nearly a hundred people a week.

In another way my day has not changed all because I help my family and do shopping for old people every other day.

> "I worry about the old people - the ones who are staying in – doing as they are told - getting thin and forgetful… and I worry about the ones that go out on the buses like nothing's happening."
>
> — Sharon

What are your worries?

Just a few! I worry about my family. What it's like for the kids to be out of school I don't want them going back til it's safe but they need school. My eldest grand-daughter is not

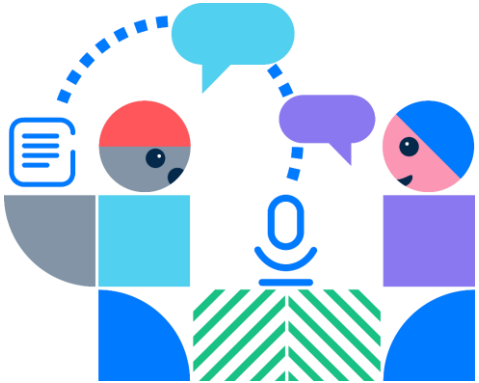
Wick Award Big Local lockdown stories

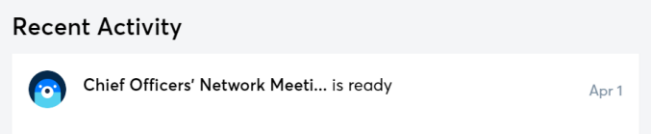
Insights or storytelling?

✓Looking for themes, making changes & sharing findings

✓Sharing a story to raise awareness or motivate action

Recording & Transcribing – Otter.ai DEMO



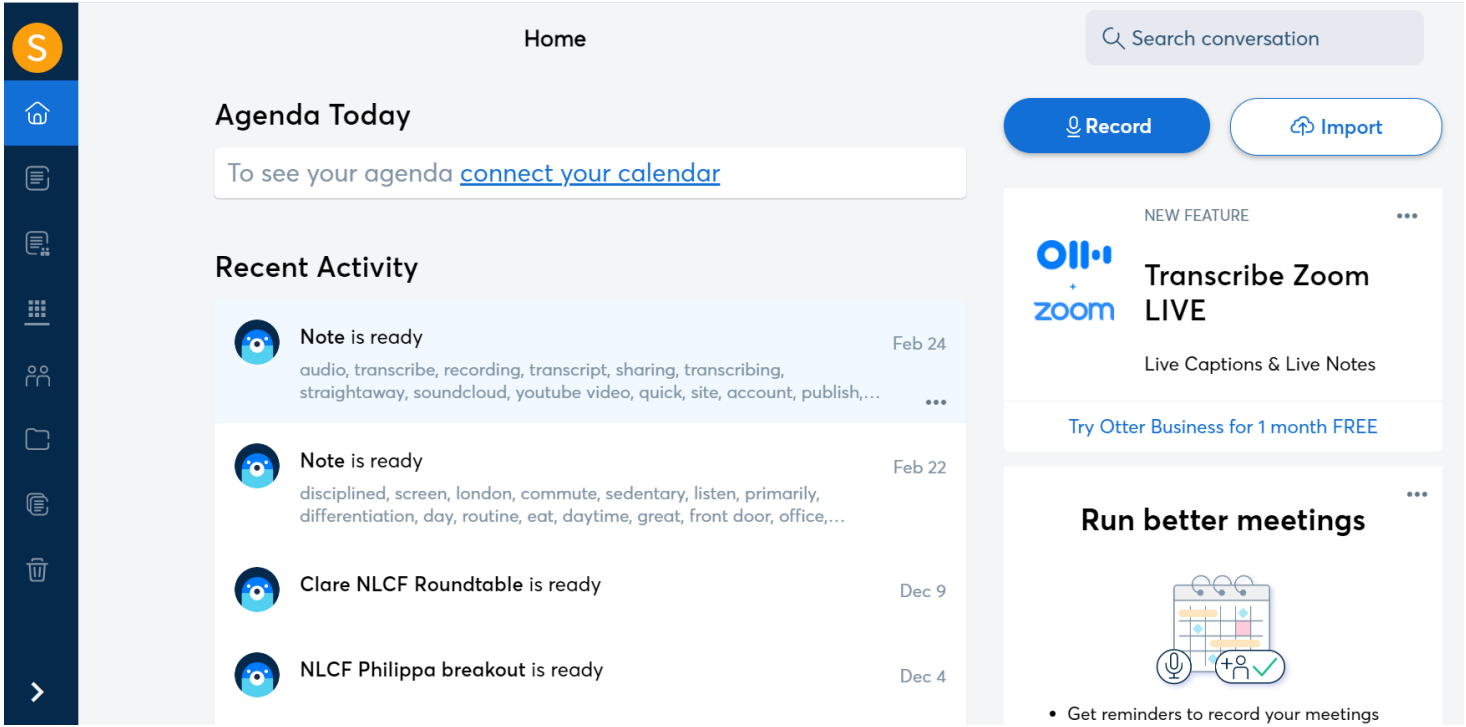


https://otter.ai/pricing

There are others – try these paid for multi-language e.g. Rev and Sonix)

Record, transcribe, edit and publish

Otter.ai



Transcribing conversations with Otter

- ✓Record & import conversations or record live
- ✓Turn conversations into text, edit the results and share transcripts with others
- ✓Highlight insights from your conversations
- ✓Use workarounds to navigate free account limits
- ✓Make sure to manage your account settings

Otter.ai pricing

$8.33 / month if paid annually
$16.99 / month if paid monthly

Basic

- AI meeting assistant records, transcribes, captures slides, and generates summaries in real time
- NEW Otter AI Chat: Chat live with Otter and teammates, and get answers to meeting questions instantly
- Joins Zoom, MS Teams, and Google Meet to automatically write and share notes
- 300 monthly transcription minutes; 30 minutes per conversation; Import and transcribe 3* audio or video files lifetime

Pro

Everything in Basic +

- Add teammates to your workspace
- Team features: shared custom vocabulary; tag speakers; assign action items to teammates
- Advanced search, export, and playback
- 1200 monthly transcription minutes; 90 minutes per conversation
- Import and transcribe 10* audio or video files per month

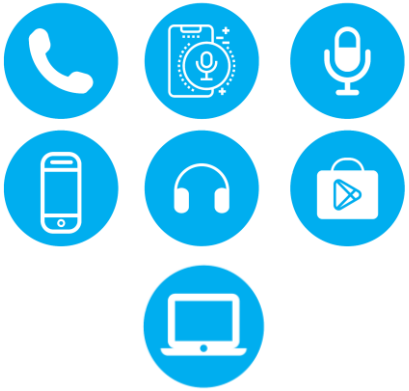
Business

Everything in Pro +

- Admin features: usage analytics, prioritized support
- Joins up to 3 concurrent virtual meetings to automatically write and share notes
- 6000 monthly transcription minutes; 4 hours per conversation
- Import and transcribe unlimited* audio or video files

Otter pricing

What equipment will you need? Or already have?



Lapel mic – plug into your phone (face-to-face)

Audio with Camden Disability Action

“We did some engagement work with the Council around the environment and Camden's Climate Action Plan, and I recorded what one of the members thought about that and put that into our newsletter.

Rather than just a standard write up on the piece of engagement, it had the voice of the member there [...] it gave the whole thing some authenticity.

It's a simple thing, but it makes it more powerful - being able to hear a member talk and hear their voice in it - it just brings the whole thing to life.”

Writing good survey / interview questions

Key steps

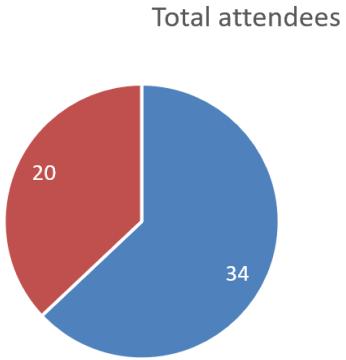
- ✓ Think about your data collection purpose / goal / research question
- ✓ Write down any question you could ask to help you answer your research question
- ✓ Group your questions by theme and remove or merge similar ones
- ✓ Depending on what you're asking you might fit 6-10 general questions into a 30 minute interview
- ✓ Write your questions in a way that people will understand using plain English
- ✓ Begin with an easy or general question as this will help participants warm up to the interview
- ✓ Add prompts for each question - these will help when you need more detail or a participant struggles to answer a question
- ✓ Mark the most important questions so you can prioritise them if you run short of time
- ✓ Test your questions by reading them to a colleague, asking what they think each one means

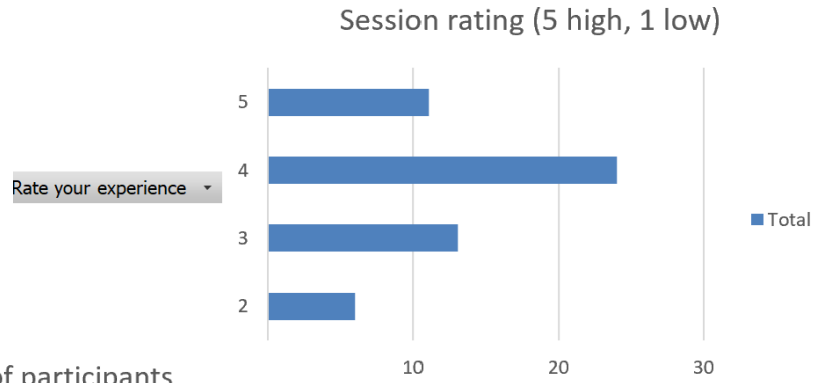
Now you've captured your data – what next?

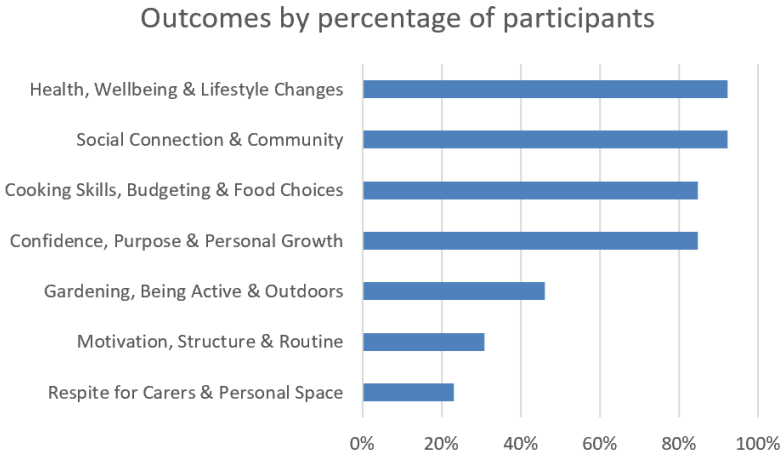
2. Getting started with data analysis

Quantitative vs Qualitative data

What is quantitative data?







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'

Qualitative data

What does coming to Care Share Eat mean to you?
It’s helped me build better habits - bit by bit. I don't feel overwhelmed anymore. I have friends here to talk to. And I look forward to it. It's made me feel more hopeful.
I love being involved in the gardens. Gardening gives me a sense of achievement, and I love that we eat what we grow. It's amazing!
It’s my weekly moment to breathe fresh air and feel useful. I feel proud bringing home meals I cooked myself.
It’s the only time I get a break from caring responsibilities and having a few hours to breathe in a welcoming space means everything. I’ve made friends here I never would have met otherwise.
It’s helped my anxiety. At first I found it challenging being around so many people but - I feel calmer here now. I feel like I know people and I feel like it's a safe space for me.

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)

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**

The value of sharing qualitative data

Qualitative data can help us:

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

3a. Dive into data

Methods for converting qualitative data into themes and findings

Four light touch approaches

Dive into the data and see what you learn:

I. Visually spotting themes
II. Word clouds
III. Interview summaries
IV. AI generated summaries

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

Over to you:

How do you feel about analysing qualitative data?

Go to

www.menti.com

Enter the code

1691 5358

Or use QR code

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?

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

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

CSE participant summary

Interview 1: Participant name or code

- ✓ About them
- ✓ About their wellbeing goal

Topics discussed

- ✓ What brought you here
- ✓ What keeps you coming
- ✓ What have you learnt
- ✓ What does attending mean for you in your life
- ✓ Are you experiencing any barriers to coming in future
- ✓ What health and wellbeing goals do you have

"The doctor suggested finding something active to help with my physical health."

"The nutrition advice has helped me lower my blood pressure"

"The gardening gets me moving without pressure"

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 & Gemini)

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 & sentiment

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

Example AI prompts

Set the scene:

- ✓ The following transcript is from a research project about …
- ✓ The following quotes are in response to the [question] from a survey with …

Request the output:

- ✓ Summarise the key themes in this text
- ✓ Which are the most prominent 3 themes in this list
- ✓ Give me 3 example quotes for each theme
- ✓ List all the quotes that mention [theme]
- ✓ 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

Link to video

Analysing data with AI

NAVCA artificial intelligence training toolkit for development workers

superhighways

harnessing technology for community benefit

Break time

10 minutes

Qualitative data analysis

Is anyone already doing this?

- ✓Do you have any tips
- ✓What have you learnt in the process?

Deeper dive - 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

Ref	What barriers do you face to attending our sessions?
1	Travel costs to the venue
2	I sometimes have anxiety in larger groups but you were very welcoming
3	Caring responsibilities for my husband
4	Social anxiety around lots of people
5	Mobility issues and stairs at the venue
6	Transport costs are high
7	Too cold in winter to go out
8	Budget is tight at the moment but I'll come if I can
9	I'm not confident to travel when it's too wet and windy
10	Childcare availability
11	I can't speak English well

Potential codes identified

- Travel (Cost/weather/mobility)
- Anxiety
- Caring responsibilities
- Accessibility
- Language

Identify possible codes

Ref	What barriers do you face to attending our sessions?	Travel	Anxiety	Caring	Access	Language
1	Travel costs to the venue	Yes				
2	I sometimes have anxiety in larger groups, but you were very welcoming		Yes			
3	Caring responsibilities for my husband			Yes		
4	Social anxiety around lots of people		Yes			
5	Mobility issues and stairs at the venue				Yes	
6	Transport costs are high	Yes				
7	Too cold in winter to go out	Yes				
8	Budget is tight at the moment, but I'll come if I can	?				
9	I'm not confident to travel when it's too wet and windy	Yes	?		Yes	
10	Childcare availability			Yes		
11	I can't speak English well					Yes

Coding practice

What codes you would apply to responses to the following question:

What does Care Share Eat mean to you?

In small groups - 8 minute discussion

ID #	What does Care Share Eat mean to you?	Code/s?
1	It's the only time I get a break from caring responsibilities and having a few hours to breathe in a welcoming space means everything. I've made friends here I never would have met otherwise.	
2	It helps me feel less alone.	
3	It's been a lifeline for my mental health, and it helps me make better decisions about the food I eat.	
4	I've noticed the fresh air makes such a difference to how I feel. I never used to get much time outside. We don't have a garden and I love it here.	
5	I like being outside and growing food in the raised beds. Coming here has improved my mental health.	
6	It's helped me eat more balanced meals and I've re-discovered a love for cooking - I'm really grateful for that.	
7	I've learned how to cook cheap meals that actually taste good and my kids will eat them too!	
8	It's the highlight of my week. It gives me a break from worrying about everything else. It's one of the few places I feel truly understood as lots of people here are carers.	
9	I feel calmer and happier after every session	
10	I come for the company — I've made lots of new friends and I've discovered new things I actually enjoy doing.	
11	Before joining, I barely left the house and struggled with my confidence. Gardening outside each week has gently built up my strength and mobility, and my mood has lifted too. I feel more capable in myself.	

Example solution

Potential codes:

- ✓ Social Connection & Community
- ✓ Respite for Carers & Personal Space
- ✓ Health, Wellbeing & Lifestyle Changes
- ✓ Cooking Skills, Budgeting & Food Choices
- ✓ Gardening, Being Active & Outdoors
- ✓ Confidence, Purpose & Personal Growth

What codes did we find?

ID #	What does coming to Care Share Eat mean to you?	Social Connection & Community	Respite for Carers & Personal Space	Health, Wellbeing & Lifestyle Changes	Cooking Skills, Budgeting & Food Choices	Gardening, Being Active & Outdoors	Confidence, Purpose & Personal Growth
1	It's the only time I get a break from caring responsibilities and having a few hours to breathe in a welcoming space means everything. I've made friends here I never would have met otherwise.	Yes	Yes				
2	It helps me feel less alone	Yes					
3	It's been a lifeline for my mental health and it helps me make better decisions about the food eat.			Yes	Yes		
4	I've noticed the fresh air makes such a difference to how I feel. I never used to get much time outside. We don't have a garden and I love it here.			Yes		Yes	
5	I like being outside and growing food in the raised beds. Coming here has improved my mental health.			Yes		Yes	
6	It's helped me eat more balanced meals and I've re-discovered a love for cooking - I'm really grateful for that.				Yes		
7	I've learned how to cook cheap meals that actually taste good and my kids will eat them too!				Yes		
8	It's the highlight of my week. It gives me a break from worrying about everything else. It's one of the few places I feel truly understood as lots of people here are carers.	Yes					
9	I feel calmer and happier after every session			Yes			
10	I come for the company — I've made lots of new friends and I've discovered new things I actually enjoy doing.	Yes					Yes
11	Before joining, I barely left the house and struggled with my confidence. Gardening outside each week has gently built up my strength and mobility, and my mood has lifted too. I feel more capable in myself.			Yes			Yes

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)

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

What are the positive health & wellbeing outcomes that Care Share Eat contribute to?
(additional coded responses in green)

Health, wellbeing & lifestyle changes

- ✓ Reduced anxiety
- ✓ Improved mental health
- ✓ Lifted mood, increased optimism
- ✓ Benefits of fresh air and gardening

The outside growing space adds another vital setting to improve mental health

Ref	Code = Health, wellbeing & lifestyle changes
3	It's been a lifeline for my mental health, and it helps me make better decisions about the food eat.
4	I've noticed the fresh air makes such a difference to how I feel. I never used to get much time outside. We don't have a garden and I love it here.
5	I like being outside and growing food in the raised beds. CSE has improved my mental health.
9	I feel calmer and happier after every session
11	Before joining, I barely left the house and struggled with my confidence. Gardening outside each week has gently built up my strength and mobility, and my mood has lifted too. I feel more capable in myself.
13	It's helped me build better habits - bit by bit. I don't feel overwhelmed anymore. I have friends here to talk to. And I look forward to it. It's made me feel more hopeful
15	It's helped my anxiety. At first, I found it challenging being around so many people but — I feel calmer here now. I feel like I know people and I feel like it's a safe space for me.
16	It gives me a break from worrying about everything else. I come for the gardening — it gets me moving and clears my head.
20	CSE is a home from home for me. I feel really lucky to live nearby. It's a space where I can relax and enjoy good company. Spending time here really lifts my mood.

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)

3b. Dive into data

Tools for converting qualitative data into themes and findings

Choose from…

1. Spreadsheets (utilising a range of features)
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

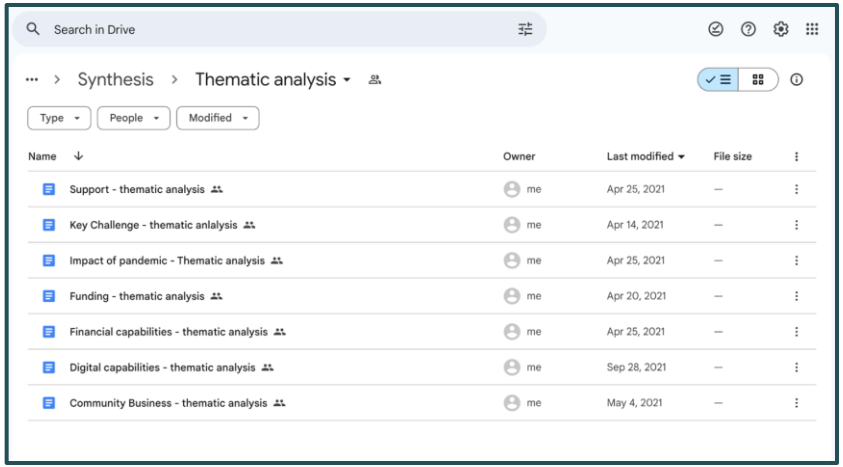
- ✓ Search (Control+F or Filter) to find specific words to code
- ✓ Counta formula to find rows you haven't coded
- ✓ Filter or COUNTIF formulas to identify two codes used together
  - ✓ Merge / delete one if similar
  - ✓ Use to look at 'sub-codes'
  - ✓ Analysis
- ✓ Turn on filters for a code to see 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

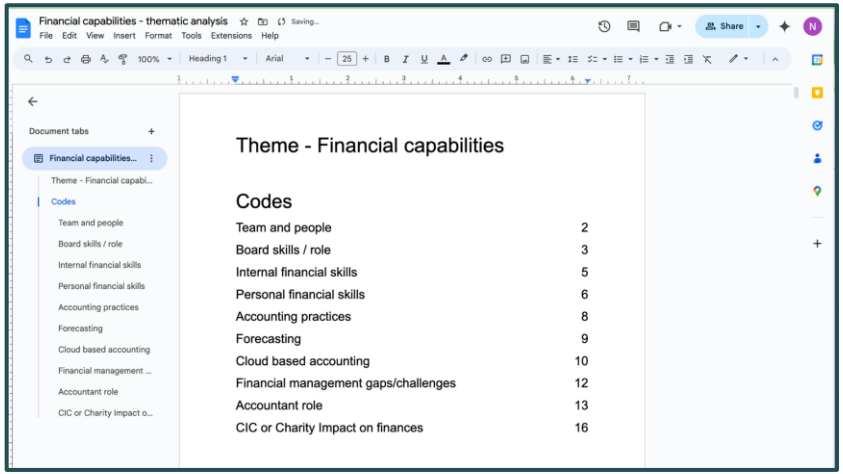
2. Documents

- ✓ 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)





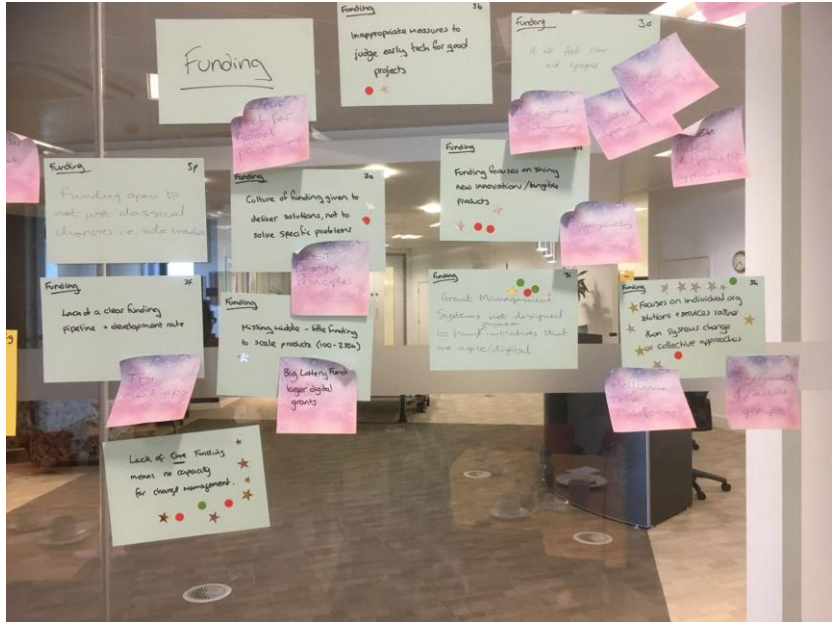
3. Paper post it notes

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!



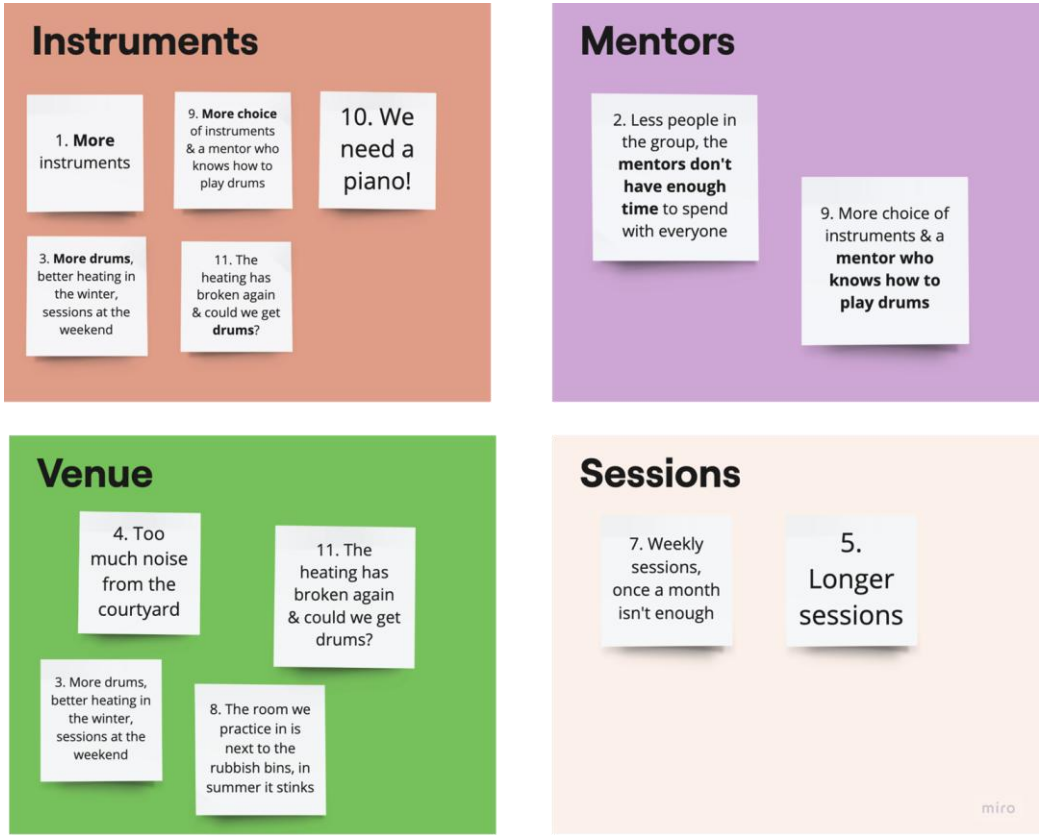
4. Online Whiteboard

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)



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

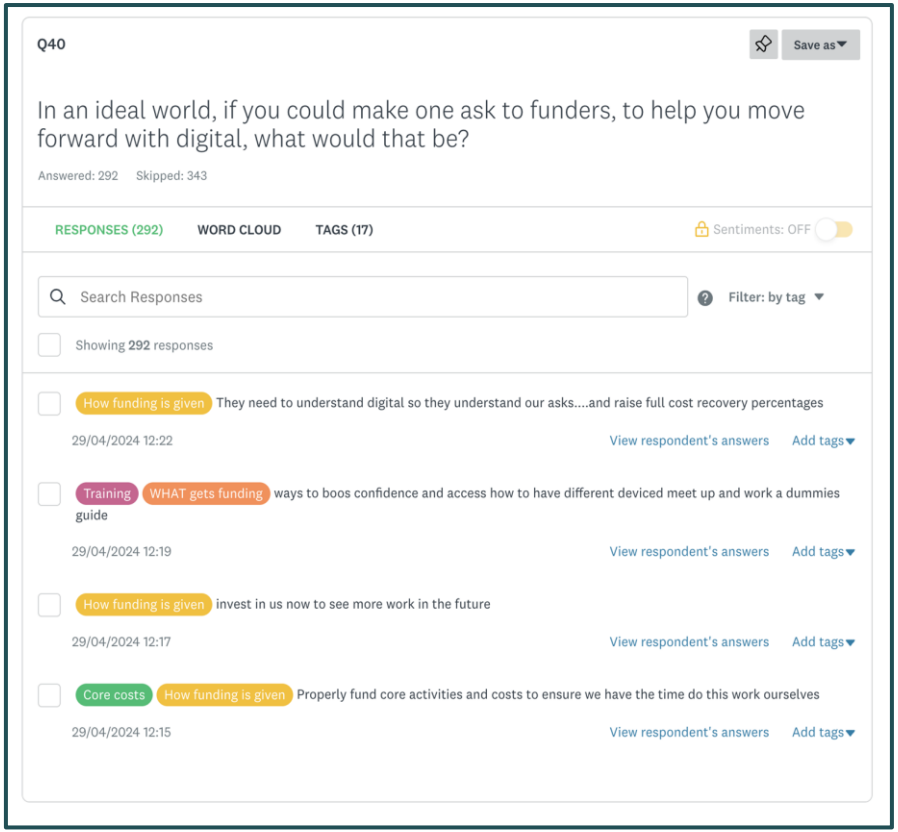
Boards are infinite sizes, create multiple project areas on one board

Use a free trials / pay for a month and cancel for analysis/ meetings

Export to spreadsheet / image and delete board

5. Survey monkey

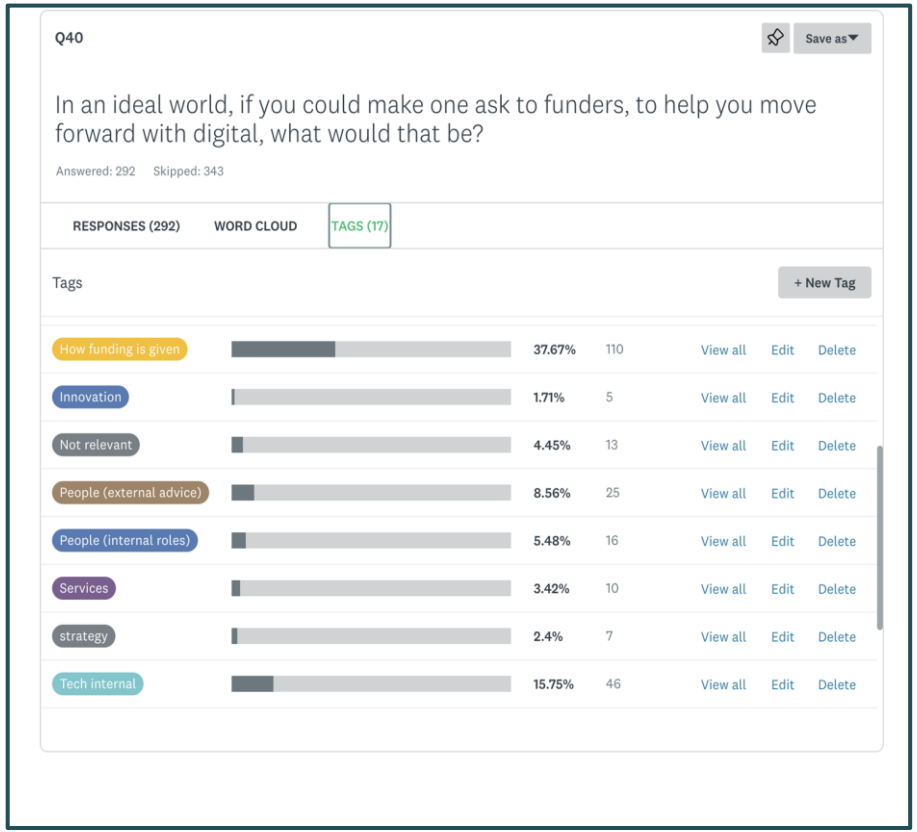
- ✓ Tick the box to add a code to a quote
- ✓ You can search and tick the box to apply a tag to all quotes
- ✓ You can export this later to Excel spreadsheets format



Example using survey monkey

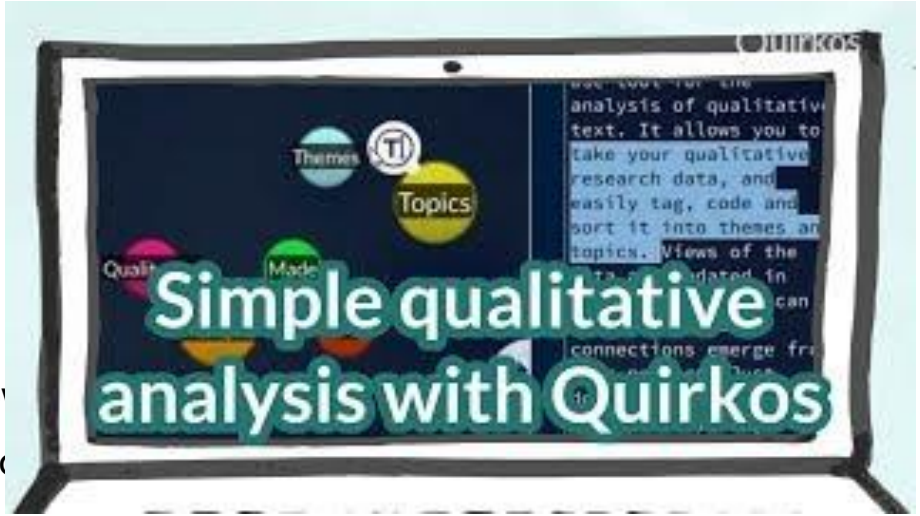
On the tags sheet you can

- ✓ 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 ho
- ✓ Helps you learn how to code data to
- ✓ Link to video here



A summary - when to code data & how

Light touch coding...

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

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

Do not code...

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

4. Research plan

A tool for planning your approach including ethical data handling and consent

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

Starting a research plan CSE example

Research questions

1. What are the health and wellbeing challenges of our local community
2. What are the positive health and wellbeing outcomes Care Share Eat contributes to

Analysis process

- ✓ Quarterly survey using Ms Forms and analyse in Excel
- ✓ Follow up interviews with sample 15 participants (random vs new to programme) 30 mins
- ✓ Use OtterAI to transcribe interviews and write summary
- ✓ Highlight key quotes about challenges and outcomes of our programmes
- ✓ Code each quote for each research question
- ✓ Review quotes for each code and summarise key challenges & outcomes
- ✓ Use Padlet for all codes with anonymised quotes to share back with participants, health partners & funders

Example

Interview guide

- ✓ What brought you here
- ✓ What keeps you coming
- ✓ What have you learnt
- ✓ What does attending mean for you in your life
- ✓ Are you experiencing any barriers to coming in future
- ✓ What health and wellbeing goals do you have

Research question and codes

- ✓ Why do people come to us?
  - ✓ Self-directed motivations
  - ✓ Push factors
  - ✓ Situations they are in
- ✓ What is the impacts for participants?
  - ✓ Connection
  - ✓ Skills
  - ✓ Health & wellbeing
- ✓ What barriers are you experiencing?
  - ✓ Caring responsibilities
  - ✓ Costs
  - ✓ Travel / mobility

Next steps: Your research plan

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	• *Identify and share insights from our community with health partners* • *Demonstrate the impact of our services in a health context* • *Make the case for funding from health commissioning* *We will include our key findings, with quotes and stories in:* • *Our monthly community newsletter* • *A report for local VCSE Alliance* • *Presentations to the health partners and local authority*

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?	• The barriers that our communities face for better health outcomes • What are the community solutions that work to improve health outcomes • How are we uniquely placed to support our community achieve better health outcomes

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!

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. Show example of our data set & we'll pick people to interview
Analysis approach • How will you analyse your data? • What tools are you thinking of using? • Coding, otter, files	**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

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? • Responsible Data Planning Matrix (Download) • 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 2026. All quotes will be analysed anonymously.

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 & 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

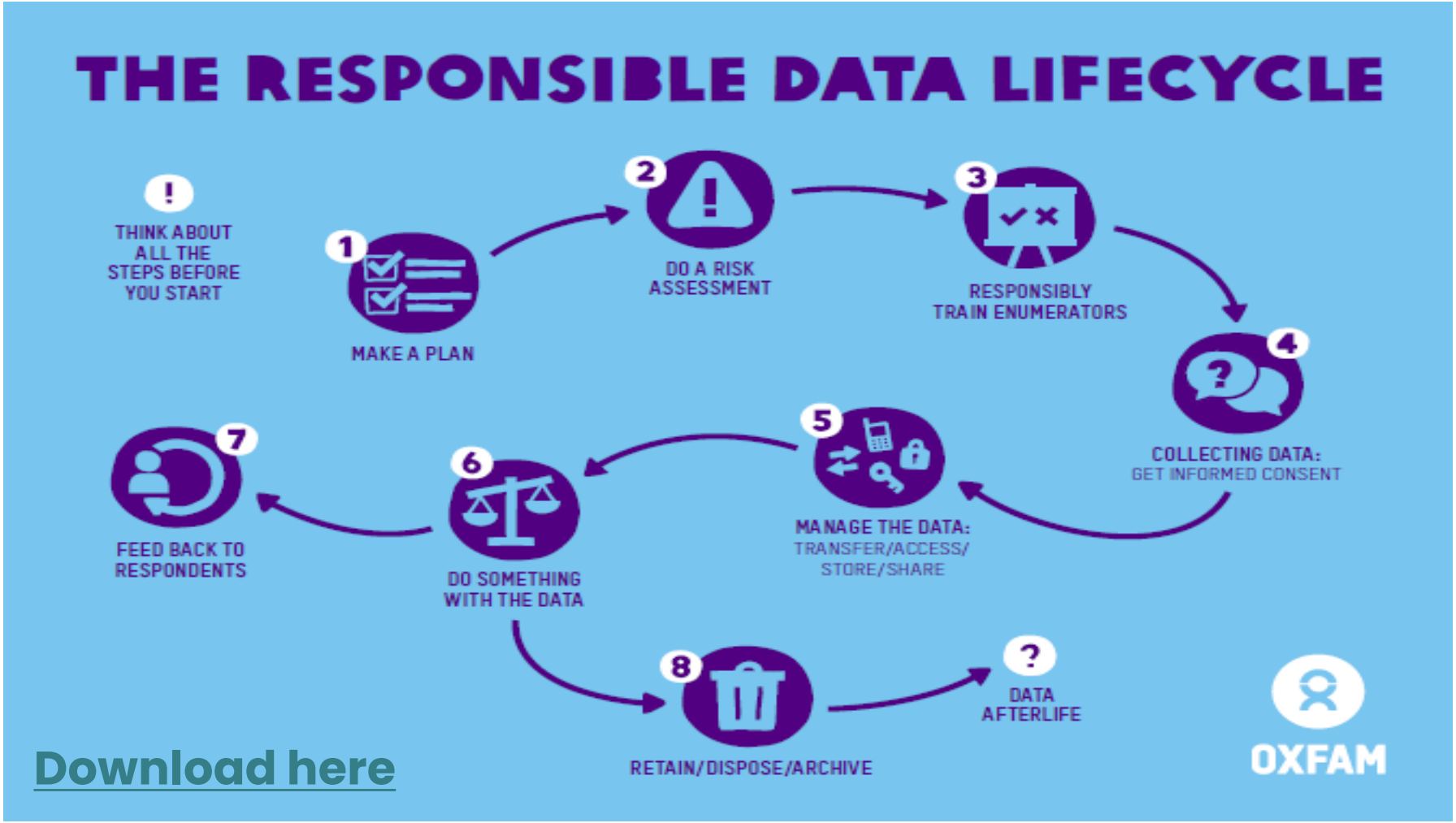
- Guide to Informed consent (by Think Social Tech on behalf of the Open Data Institute)
- NCVO Guide to informed consent
- GDPR legitimate purposes (Information Commissioner's Office) for storing and using data

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)



Download here

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 Health partners / 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 interviewees 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 a volunteer support with this? Need confidence in analysis - will involve the team to sense check findings

5. Communicating your insights

Plan your approach to sharing your findings

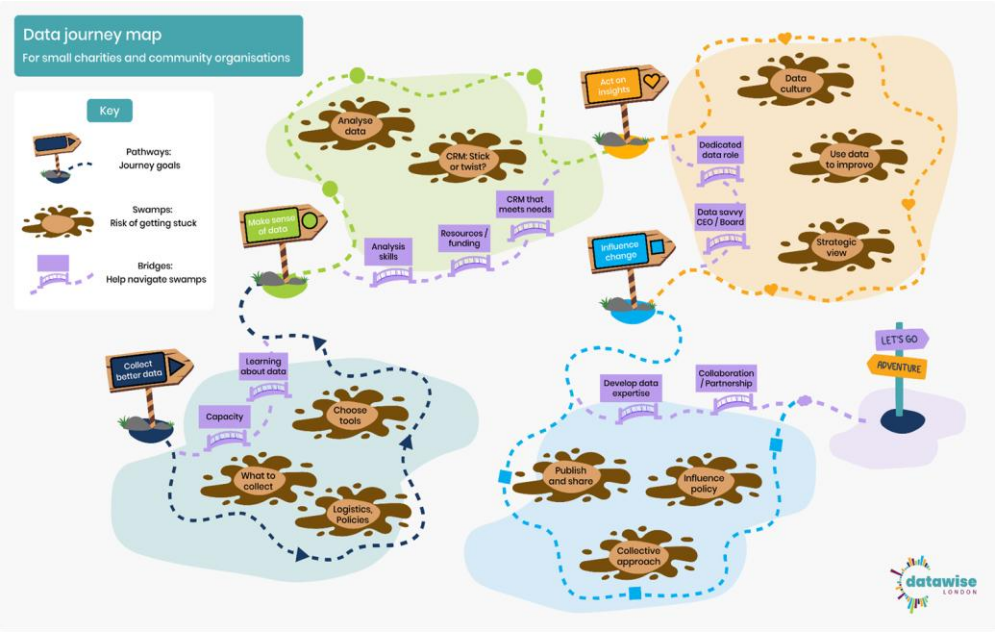
“no numbers without stories, no stories without numbers”

Stories and Numbers: Collecting the right impact data

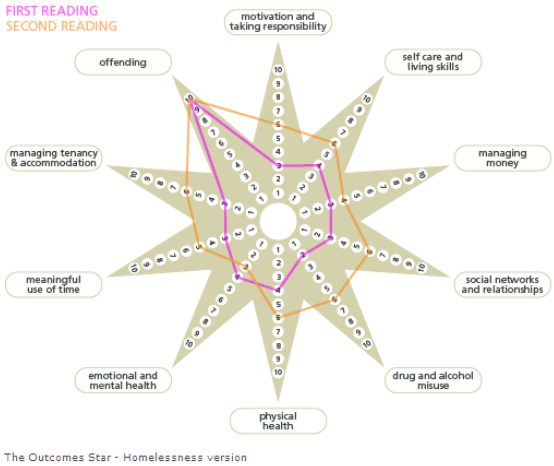
New Philanthropy Capital

Tools for presenting qualitative data

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



Data visual examples



3 out of 5 people are missing social contact

[Download our Favourite apps factsheet](#) for data collection & storytelling

Tools for presenting your data

Datawrapper

padlet

PIKTOCHART

Word It Out

infogram

batchgeo

Canva

Final takeaways

Now

- ✓ Fill in our feedback form!

Soon

- ✓ Look through the slides in Section 4
- ✓ Create a research plan
- ✓ Complete the Responsible Data Planning Matrix for your collection tools

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!

Thanks for listening

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