Analyzing Data

Introduction

"However beautiful the strategy, you should occasionally look at the results."

(Winston Churchill)

Welcome to the **Analyzing Data** module, one of eight online modules created as part of the Developing a Culture of Evaluation project. This project was conducted through a partnership between Community Literacy of Ontario and Literacy Link South Central.

This module, like all of the modules developed for this project, aims to provide practical, useful information, with a focus on small non-profits with limited budgets and limited staff resources. The modules have been written to meet the needs of the non-profit sector as identified during online research, key informant interviews and a provincial survey conducted at the outset of the project.

These are the eight online modules available from our project:

1	Introduction to Evaluation
2	Planning for Evaluation
3	Collecting Data
4	Analyzing Data
5	Taking Action
6	Communicating the Results
7	Case Study: The Evaluation Cycle in Action
8	Trends in Evaluation

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Whatever type of evaluation you are using, and whether you are evaluating your overall organization or just one program or service that you offer, your goals will be to:

- assess how your services (or a specific component of your organization such as marketing, staff/board performance, or a fundraising activity, for example) operates
- identify and document your organizational strengths and weaknesses
- measure the impacts your programs or services are having
- identify areas for improvement to maximize that impact and take steps towards implementing that improvement

Please note that throughout the modules we use the term "stakeholders" to refer to any individuals, groups or other organizations that you interact with. We use the term "clients" as a generic term to include the people who use your programming and services. So, clients are stakeholders, but stakeholders also refers to staff, volunteers, partner agencies, funders, and even the general public if what you do impacts them in some way.

We hope that these online modules are helpful to you in the important work that you do!

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Overview of the Analyzing Data Module

Our **Analyzing Data** module will help you build a culture of evaluation by exploring how to make sense of the data you have collected. We will also share some sample tools and templates that you can adapt for your own needs.

Analyzing the data you collect during the evaluation process is a key component of the evaluation cycle, which was introduced in the Introduction to Evaluation module. Although evaluation is a cyclical process, if you are just getting started, you will want to start at the planning stage. For more information, be sure to see our Planning for Evaluation module.

As a reminder, here is what that cycle consists of:

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Module Overview

In this module, we will overview why data analysis is important, the types of data you will be analyzing, how to prepare and organize the data for analysis, and the actual analysis of evaluation data.

This module is not intended to be a "how to" guide. Instead, it will give you ideas and suggestions for how to manage data analysis in your organization. Not every idea will be applicable to every agency, and it will be up to you to determine the best approach for your non-profit to take.

Why Should I Analyze the Data?

"It's the only way to grow. We're always learning something. The good, the bad, the ugly – we want to hear it all."

(Quote from a project research participant)

After you have gathered the data that you will use for your evaluation – whether you are evaluating your board, your volunteer services or your entire organization, you will need to make sense of all of that data in order to make some decisions based on your findings. After all, successful evaluation isn't just about gathering the right data, it's also about how you use that data to effect positive change – large or small – at your organization . And, it's about analyzing and assessing the impact your organization and its services have on your stakeholders and your community.

A 2012 study done in the U.S. showed that between 26 and 50% of non-profits surveyed use their data to make decisions, but that also means that at least 50% don't! Not only is this disappointing, but it is also inefficient and a waste of resources. After all, why would you go to the time and trouble of collecting data and then not use it to inform decision-making in order to make changes and improvements in your organization?

Successful evaluation isn't just about gathering the right data, it's also about how you use that data to effect positive change – large or small – at your organization.

During the research phase for the **Culture of Evaluation** project, respondents clearly highlighted one of the key benefits of evaluation as follows: Taking the time to collect data from stakeholder groups and to analyze it provides evidence of what you do well, which in turn provides confidence to the organization to continue to move forward and evolve. It also provides evidence of where change is needed, which can be very useful when seeking new funding opportunities and support from government agencies, corporate funders and the general public.

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Having strong evidence that the work you do is successful and that the people who benefit from your programs and services are achieving their goals can provide a wealth of information for promoting the important work that you do. Furthermore, as noted in our **Trends in Evaluation** module, being able to demonstrate the clear impact that your organization makes is a key trend in non-profit evaluation.

Data analysis can also help you identify any gaps in service or areas of weakness so that you can make plans to address these problem areas. Reviewing and using data can also help you identify trends, giving you the opportunity to address them early on and to plan for any changes that could be made in your organization. Being able to identify both trends and gaps can in turn help you set targets and goals for the coming year.

All of this information, both positive and negative, is valuable to help your Board of Directors or other governing bodies in their strategic planning and decision-making processes.

Types of Data

When you were collecting data for your evaluation, the type of information you collected, how you collected it, and how much you collected depended on the type of evaluation you were doing. For a small evaluation (i.e., looking at the efficiency of your intake process), the type of data collected would be very focused and limited. On the other hand, a large-scale evaluation of your entire organization would result in a significant amount of data. (For more information on data collection, be sure to see the Collecting Data module.)

If you are new to evaluation, we suggest that you start small so that the amount of data you will be collecting and analyzing will be more manageable. Regardless of the amount of data you collect, however, you may find that the analysis stage of evaluation seems somewhat daunting. What is the information telling you? How will you make sense of the data?

Don't panic – go back to the beginning and review your evaluation goals and questions. This will help you focus your analysis. What were you trying to find? Reminding yourself of your goals and questions can help you organize the data you collected as you begin your analysis. For example, if you are evaluating a particular service that you offer, you can begin by sorting the data into areas of strength and areas of weakness for that service. On the other hand, if you are evaluating client outcomes, you would sort the data according to what clients achieved (or didn't achieve).

The following chart is an example of how you could begin the analysis phase of your evaluation. Of course, your chart would be much more robust with more specific data related to your evaluation efforts! The next step would be to ask yourself "so what?", i.e., what will we do with what we have discovered, and how will we use our strengths and weaknesses to make change and improvements? This will be discussed in more detail in the **Taking Action** module of the series.

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Evaluation of Intake Process	Strengths	Weaknesses
New clients are greeted in a timely fashion	95% of clients interviewed/surveyed indicate that staff is on time for the intake interview	89% of clients interviewed/surveyed said that they had to wait at least one month for the intake appointment
The intake interview is valuable	90% of clients interviewed/surveyed indicated that they were enrolled in a program or referred to another, more appropriate organization within two weeks following the interview 95% of staff interviewed/surveyed indicated that the standard interview provides them with enough information to make the appropriate referral	None identified

The data that you have gathered can be divided into two basic groups, i.e., quantitative and qualitative.

Quantitative data uses numbers; for example, the number of clients served, how many resources your organization produced, how many events you sponsored, number of goals that clients achieved, and so on. Quantitative data could also include rankings, ratios, averages and percentages used to tabulate the data you collected. For example, if you used a five-point scale for respondents to indicate satisfaction with your services, those results would be included in quantitative data.

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The most common way to organize your quantitative data is to start with the demographics, so you will need to track and record who responded to surveys, who participated in focus groups, who your key informants were, and so on. You can tabulate information related to respondents' age, gender, relationship to the organization (staff, volunteer, client, partner agency, and so on), location or address and any other data that you gathered. While you may not be planning to report how many men over the age of 30 used your services, you may find that as you delve into the data, you will be able to identify some interesting trends. For example, males over the age of 30 may prefer to access your services in the morning while females under the age of 30 may prefer afternoons. This type of information can help you down the road as you plan changes to existing services or as you plan for new services.

***Qualitative data*,** on the other hand, uses the words and ideas put forward by your stakeholders during the data collection phase of your evaluation. You likely gathered this type of data during focus groups, interviews and open-ended questions on surveys. Qualitative data can also be gathered during informal conversations, through observation or through documents such as meeting minutes.

Here's a tip about coding: go through the material twice.

Qualitative data will need to be organized and coded by common themes. This can include concerns, suggestions, outcomes and more. For example, as you read through the data, it might become apparent that although clients find the services help them achieve their goals, they would prefer that your organization offer more flexibility in terms of operating hours. You can track your findings by setting up a spread sheet and making note of how many respondents identified the same concern or made the same request.

Here's a tip about coding: go through the material twice. The first time, develop your codes. Then go through it again to do the actual coding. If possible, have more than one person go through the data. Not only does this help to ensure that all themes are identified, but it also helps develop an organizational culture of evaluation to have several staff members and/or volunteers involved.

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As noted above, as you identify common themes you may also begin to identify that certain themes are associated with a specific group. For example, staff members may point out issues with your organization's intake process or community partners might identify improved attendance by mutual clients This is where the quantitative and qualitative data come together. This type of data relationship should be carefully documented so that it is based in fact (number of times a particular theme is identified, number of times a particular demographic group identifies the same theme) and is not simply a perception.

It is important to review the data and to begin to tabulate and analyze it with an open mind. Don't just look for answers that you expected to find. Don't ignore findings that you disagree with. All of the data is valid and needs to be considered. As mentioned above, it is a good idea to have more than one person review the data to identify themes and patterns.

If budgets allow, there is even sophisticated software that can provide this type of analysis, although this is often out of the reach of small non-profit organizations.

DEVELOPING a CULTURE of EVALUATION

Preparing and Organizing the Data

Before you can understand what the data is telling you, you need to sort it into manageable pieces. Take it one step at a time. As we mentioned earlier, we suggest that if you are new to evaluation, you start with evaluating just one component of your organization.

In the case of a small scale evaluation, your analysis may be simpler, and involve reviewing the data and picking out key trends using a simple chart format, like the one below. (Note that the sample chart calls for both the number and percentage. In a small scale evaluation, percentages can be deceiving, so it can be helpful to report your results both ways.)

Sample Evaluation Issue: Do our volunteers feel they are getting enough support?	
Number and percentage saying "yes"	
Number and percentage saying "no"	
Number and percentage saying "not sure"	
What key themes emerged from the evaluation?	
What are some of the steps we could take to address the evaluation findings?	

- If you used video or audio to record any interviews, you should transcribe the interviews. Don't interpret or summarize what respondents said: just transcribe it in their own words.

- Create separate files for each type of data collection you did. For example, create a file for telephone interviews, another one for online survey responses, and another one for focus group findings.

- Include the original text from each question and then enter all of your responses for that question. Putting all of the responses together can help you more easily identify patterns and themes that you might otherwise not notice.

- Remember that entering qualitative data can be time consuming, especially if you are transcribing recordings, so plan accordingly. (You might even be able to enlist the services of a volunteer to help with this.) There is some technology available that can help, however! OCR (optical character recognition) software can convert handwritten and printed hard copy text to machine-readable text that can be searched, analyzed and imported into other software such as Microsoft Word. Basic versions of OCR software are available free-of-charge, but you will have to pay for premium versions. Even paid versions, however, aren't perfect, and data will need to be reviewed for accuracy. Examples of free OCR software include OCRFeeder and FreeOCR.

- If you are using data analysis software, you will need to enter the data into the software.

- Spreadsheet software, such as Microsoft Excel, can help you tabulate quantitative data. (If you're new to using Excel for data analysis, be sure to check out Ann Emery's website, Excel for Evaluation, in particular the series of short but useful videos with many helpful tips and tricks.)

- Assign ID codes to each participant's response (from surveys, interviews, etc.) and enter their data for each question asked. This is an excellent way to ensure that you maintain confidentiality.

- You can also assign numbers to some responses to make them easier to tabulate. For example, age categories can be entered as 1 (under 19), 2 (19-25), 3 (26-35), and so on. If you do this, be sure to also include a “data legend” to explain what those numbers represent and keep it in a safe place. Here is a sample of what an Excel-based chart of responses could look like:

Client Survey: Intake Process

Participant ID	Q1 Age	Q2 Gender	Q4 Home address	Q5 Intake Interview	Q6 Intake Results
1	34	1	Sudbury	2	5
2	57	1	North Bay	2	5
3	25	1	North Bay	2	5
4	32	2	Huntsville	2	5
5	43	1	Elliot Lake	2	5
6	19	2	Sturgeon Falls	2	2
7	22	2	Sudbury	1	4
8	48	2	South River	2	5
9	26	2	Trout Creek	2	5
10	51	3	Sudbury	2	5

- Set up a different file for each set of questions; for example, if you asked one set of questions in a telephone interview but asked different questions in an online survey, you will need two files to tabulate the responses. Don’t try to combine them. On the other hand, if you asked the same questions, you could combine the responses.

- Look for any invalid data. For example, if you asked people to use a ranking system between 1 and 5, and you see a response of 8, you cannot use that piece of data.

- Do the numbers add up? For example, if you have 18 surveys completed by males, and 33 surveys completed by females, but the total number of surveys completed is 50, there is an error somewhere. Remember that if you allowed multiple responses to some questions, the numbers won't add up so easily. Also, if some respondents skipped some questions, you may not have as many responses as the number of surveys completed.

- For qualitative data, review the questions to ensure that they weren't leading or biased. (This should have been done in the data collection stage of your evaluation, but it's a good idea to double-check again during the analysis phase.) Compare transcribed interviews with the recordings to ensure that they were transcribed accurately.

- Review your social media and website analytics. If you have Facebook, you will want to take a look at the Insights tab on your page. Are people engaging with your posts and, if so, how often, with whom and when? Twitter analytics can help you see which Tweets received the most engagement, how many times you have been mentioned by others and who is following you. Google Analytics (available as both free and paid versions) can help you see how people find you on the internet and how they use your website.

Analyzing the Data

Now that the data has been sorted and reviewed, you are ready to begin your analysis. If you have limited experience with data analysis, you should look for help from someone who has these skills.

Many non-profits have limited budgets and may not be able to hire someone, but you may be able to find someone with expertise within your organization. Perhaps a board member or a volunteer has data analysis experience or has connections to someone who does through his or her personal network. Perhaps you can recruit a data analysis volunteer through LinkedIn for Nonprofits. As we mentioned earlier, ensuring data confidentiality is KEY so be sure to only share data with all identifying data removed, or ensure that any volunteers are following your confidentiality requirements.

You can also take some training, either at your local college or university, or through a webinar or an online course. For example, the FMA Institute offers a course called Excel for Nonprofits: Operational Excellence through Data Analysis. Read about evaluation and data analysis via blogs (Beth Kanter's Beth's Blog provides many posts about evaluation and numerous links to resources).

However, you don't need to be an expert to get started. Here is a handy checklist to assist you.

- ✓ The first step is to review your evaluation questions and purpose and then begin to highlight the data that addresses those questions and the purpose.
- ✓ Then, you will want to look for frequencies of occurrence. Is a particular concern or idea mentioned once, five times, fifteen times? What percentage of responses does this represent? Word clouds are a great way to easily see frequencies of occurrence. Wordle and WordClouds.com are quick and easy ways to create your own. Here is what a word cloud image from this module looks like:

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- ✓ Can you establish quantitative patterns in the data? For example, are clients from a particular age group more or less likely to mention the same concern? Are there patterns based on gender? Are there multiple patterns that reflect multiple demographic similarities (age, gender, geographic location)?
- ✓ Can you establish patterns in the qualitative data? For example, were focus group participants consistently identifying the need for new materials in training programs? Were volunteers providing feedback on the supports they receive and/or need?
- ✓ Are there common themes that can be identified? For example, are volunteers satisfied with the training they receive but dissatisfied with the time commitment they are expected to give?
- ✓ How frequently are ideas, concerns and themes mentioned? Is there a high, medium or low occurrence?
- ✓ Are there "one-off" ideas or concerns mentioned? Are there unusual ideas mentioned? Even though there is not a high or even a medium occurrence, they may be worth considering.

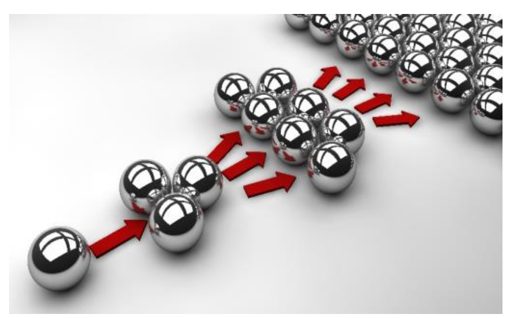
If you have more in-depth or complex data analysis needs, computer software is available that can help with this, known as CAQDAS (computer assisted qualitative data analysis software). This type of software assigns categories and values to the content that is run through the system. If you have recorded interviews, you would need to first transcribe them, so this could become a multi-step process. This type of software is particularly valuable if you have a large amount of qualitative data to review. CAQDAS is generally expensive, although there are some free options including the Coding Analysis Toolkit and Qiqqa (documents need to be in PDF format to use Qiqqa).

How does all of this information, including the themes, patterns and occurrences you have identified, respond to your evaluation questions? Does it answer them? Does it identify successes and weaknesses? Does it provide direction for change?

A good way to begin to answer these questions is to ask yourself yet another question: so what? For example, if you identify that males under 30 have a high occurrence of satisfaction with the service provided by your organization, so what? Does that represent a success that you can use to bolster your marketing efforts, your services, your funder reports, or your ability to demonstrate how your organization achieves strong community impacts? Does it help you make decisions about other areas of your programs and services that weren't included in this evaluation?

When looking at the data and what it reveals, think about how it can impact the future of your organization, any changes that may be needed, how to use it to increase effectiveness and reduce areas of weakness, and other ways that it can be of benefit. Discuss your findings with your colleagues, your Board of Directors and others who may have input.

One area that should receive a lot of your attention is impact. How does your evaluation help demonstrate that your programs and services are having an impact on one or more of your stakeholder groups? For example, are there specific outcomes that can be measured such as successful completion of a job readiness program, or changes to lifestyle based on learning sessions, or better budgeting skills thanks to financial literacy training?



Using the Data

We will take a more in-depth look at using the data in the Taking Action module, but during the data analysis phase of your evaluation, you will want to be thinking ahead about why you did your evaluation, what you were hoping to determine, what you have discovered during your analysis, what it means to your organization, and how you will use your findings to make changes and continue to build on your successes.

Depending on the scope of the evaluation you are conducting, data can be used for a number of reasons including:

Clarifying purpose

When looking at the data that you have collected to review your organization's purpose, several questions should be asked, including:

- Why does your organization exist?
- Is it doing the work it was intended to do or has it strayed from its purpose?
- Why does your organization offer the programs and services that it does?
- Are you doing work that is outside of your organizational mission?
- Is there something new or different that you could/should be doing?

- How does the work you are doing reflect back to your mission statement?

The evaluation data you gather will help you answer these questions and determine if your organization is indeed fulfilling its mission. If it is not, you need to identify why. For example, have needs changed in your community? Perhaps your organization has expanded and if so, you will want to consider if the mission should also expand. If this expansion was accidental, you will want to evaluate if you need to "return to your roots" or if you are heading in the right direction.

Identifying where improvement is needed and identifying good practices

The evaluation data you collect should help you identify what your organization is doing well and where improvements are needed. It should show you whether your organization is achieving successful outcomes and impacts.

Celebrate your successes and learn what made them successes so that you can use that learning to help improve areas in your organization where things aren't going as well. For example, do you have strong policies and procedures that are followed for client intake, but no real process for client exit? If so, your evaluation report can identify that better policies and procedures are needed for client exit. Or, have you made a significant change recently, such as relocating to new premises that has resulted in higher client numbers? In this case, be sure that you can clearly demonstrate that the relocation was directly responsible for those increased numbers!

Your evaluation findings can be used to determine if some of your services or organizational components need to be revised, continued, enhanced or even abandoned.

Can you identify how your organization makes a difference to a particular group or groups of stakeholders, or to the community at large? Can you clearly demonstrate the impact and outcomes of the services you provide?

Your evaluation findings can be used to determine if some of your services or organizational components need to be revised, continued, enhanced or even abandoned.

It is human nature to shy away from negative findings, but when it comes to evaluation, identifying what isn't working well and why it isn't working well is essential when it comes to making improvements.

Informing, training and motivating staff (and volunteers)

Analyzing the data you have collected and determining what your organization is doing well and where improvements are needed can further help you identify what needs to be done from a human resources point of view. Perhaps your findings indicate that improvements could be realized with some additional training for staff and/or volunteers. Or perhaps your data reveals that staff members are not feeling motivated. Making changes to how your organization operates can have a major impact on staff and volunteer motivation.

Another way to increase motivation is to involve staff and volunteers in the data analysis when appropriate. For example, volunteers who work with clients can provide insight as to why clients prefer some of your services more than others, or why they prefer to attend one location over another. Frontline staff will have a different outlook than management staff and can offer perspectives that might not occur to managers.

Motivating clients

Success and positive outcomes also motivate clients. If your evaluation findings reveal that clients aren't happy with the services your organization provides, you may also discover that your client numbers are decreasing. Making improvements so that programs and services are more accessible, for example, or changing the services provided to reflect current client needs can, in turn, lead to improved client motivation and success.

Seeking explanations

Sometimes, the data you collect will easily reveal why a component of your organization is or isn't working. Other times, however, you may have to dig deeper to identify the reasons for success or struggles. Perhaps there are barriers to attendance, competition from other services or organizations, or a lack of marketing. If the reason for a particular result is within your control, you can make the necessary adjustments to help you achieve a better result. For example, if a fundraising activity did not achieve its targets, you will want to evaluate the marketing associated with that activity. You may also want to consider the timing of the campaign (were there a lot of other events going on?), the type of activity it was, and so on.

Identifying Trends

Analyzing the data you collect can help you to identify trends, such as regular attendance on certain days of the week and sporadic attendance on others, or a change in the median age of volunteers or an increased use of technology by certain client groups. Identifying trends can help you work towards future success by avoiding potential problem areas and using positive trends to your advantage. For example, if you discover that your client group is using text messaging more than phone calls, you may want to communicate with them differently than in the past.

Informing stakeholders

Once your data has been gathered and analyzed and decisions have been made, you will want to shout out your successes, identify your weaknesses and explain where the organization is heading and why. Who you share the information with will depend on the purpose of the evaluation. For example, Board members may receive different information and in a different way than funders or other stakeholders. We will look at this more closely in the **Communicating the Results** module.

Conclusion

Developing a culture of evaluation is about so much more than just asking questions – although it is essential to ask those questions! Along with gathering evaluation data, both formally and informally, you also need to analyze that data to understand what your stakeholders are telling you. (As a reminder, stakeholders include staff, volunteers, clients, partner organizations, funders, and even the community at large.)

For small non-profit organizations, finding the time to analyze data can be challenging. However, it is of critical importance to the success of your organization. Data analysis allows you to make informed decisions, based on evidence, about your organization's future. It gives you the opportunity to identify successes, areas of weakness and gaps in service which in turn provides organizational decision-makers with the information they need to make wise decisions.

Data analysis is about more than just crunching the numbers. It is also about listening to what your stakeholders have told you, identifying common themes and exploring the richness and depth of the information you have gathered. It is a key component in the evaluation cycle and is necessary in order to move on to the next step, Taking Action.

We hope that this module has provided guidance and support for your data collection efforts. You can continue the conversation on evaluation in non-profit organizations in other ways, too! For example,

- During the life of the **Developing a Culture of Evaluation** project (it ends in March 2017), visit our website to join our online discussion group, or to find out how to participate in an online clinic and/or webinar.
- Stay connected with the Ontario Nonprofit Network, Imagine Canada, and other organizations with an expertise in non-profit evaluation.
- Participate in conversations about evaluation in non-profits in your community. Talk to your fellow non-profit organizations, your volunteers, your Board of Directors, your funders, your donors and community members.
- Share your thoughts with us via our Facebook page or on Twitter.

Additional Resources

Analyzing Qualitative Data in Word from the Centre for Community Based Research

Basic Guide to Program Evaluation by Carter McNamara

Community Tool Box from the Work Group for Community Health and Development at the University of Kansas.

Evaluation Toolkit from The Pell Institute and Pathways to College Network.

Help! My Nonprofit Needs a Data Nerd and How to Find Them! By Beth Kanter (Beth's Blog). November 29, 2012.

How and Why Nonprofits Use Outcome Information by The Urban Institute, Washington, D.C. June 2002.

Implementing evidence-informed practice: A practical toolkit by the Ontario Centre of Excellence for Child and Youth Mental Health, Ottawa. 2013.

Introduction to Program Evaluation for Public Health Programs: A Self-Study Guide by the Centers for Disease Control and Prevention.

Nonprofits Collect Lots of Data, But Most Don't Use it Says NTEN/Idealware Report by Beth Kanter (Beth's Blog). November 16, 2012.

Project Evaluation Guide for Nonprofit Organizations: Fundamental Methods and Steps for Conducting Project Evaluation by Fataneh Zarinpoush. Imagine Canada, Toronto. 2006.

Tools and Resources for Assessing Social Impact by the Foundation Center.

Tools to Collect and Analyze Field Data by TechSoup.org. September 29, 2014.

Top 10 Spreadsheet Secrets from a Nonprofit Data Nerd by Beth Kanter (Beth's Blog). April 3, 2013.

Understanding Software for Program Evaluation by Idealware. August 2013. (Note: this link takes you to a free download where you are required to provide your name and email before downloading the report.)

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