LISTEN AND LEARN

How charities can use qualitative research

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EXECUTIVE SUMMARY

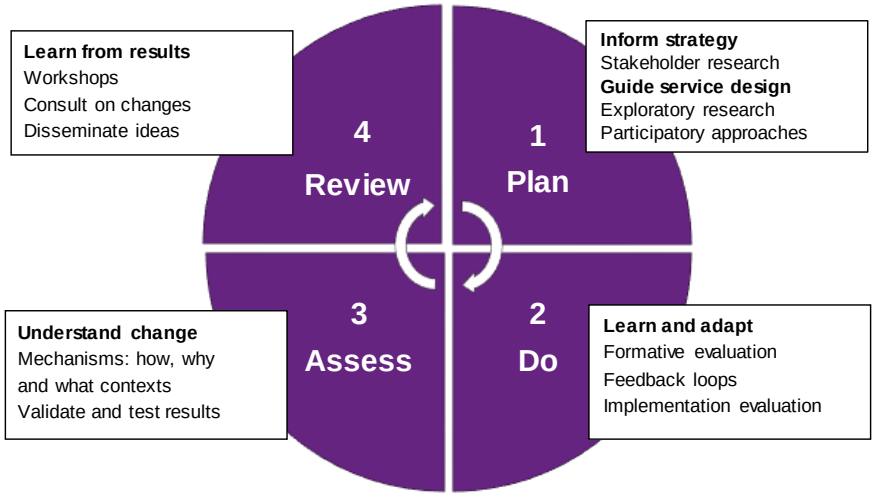
Qualitative research is focused on what things mean to people, and so it sits very naturally with the questions that a charity asks. Charities are often already collecting qualitative data through their service provision and staff interaction, and use this ad hoc to inform their ideas and check the experience of services. But they are not conducting qualitative research rigorously, with appropriate sampling and analysis—leading to it being dismissed.

We see this as a missed opportunity. When qualitative research is undertaken in a more systematic way, it provides valuable insight to help drive service design, delivery and improvement, and keeps user voice central to a charity's work.

This paper is designed to help charities better understand the role of qualitative research in informing a charity's decisions and helping it to identify what works.

When to use qualitative research

Qualitative research can reveal how and why people think and behave in particular ways, and so is useful at all stages of programme design and delivery, and as part of an organisation's strategy cycle too. We have adapted Inspiring Impact's cycle of impact practice to indicate how qualitative data can contribute in different ways at each stage of development.



Key principles for good qualitative research

Good quality or 'rigour' in qualitative research means research that has been undertaken in a systematic and carefully considered way, with a clear, defensible explanation of the approach and how the researcher(s) arrived at their findings. We have identified five key principles to consider which should help ensure that your research is meaningful and has credibility with an external audience:

1. **Valid (validity):** The data and findings are meaningful, so the research can answer the questions being asked in a relevant and accurate way.

2. **Reliable**: There is a clearly documented research process and approach to data analysis that shows how those findings were achieved.

3. **Confirmable:** The findings have been corroborated through different sources.

4. **Reflexive**: Biases are managed through careful research design and researcher care.

5. **Responsible:** Research provides a responsible portrayal of beneficiaries and the cause.

Choosing researchers

The decision about who does the work should depend on the charity's research capacity; whether an independent perspective is needed; how important external credibility is; and whether this is a one-off exercise, or will be something the charity does repeatedly. We find that not many charities go for the option of conducting their own work with expert support—but it's an approach that should be considered more often. Staff will learn more and it saves on costs, which offers a pragmatic compromise on quality and credibility. There are two stages when external expertise is most needed: for the research design and sampling approach and the analysis approach.

Sampling

To do good quality qualitative research it is vital to ensure your sample resembles the whole group as closely as possible. Start with a clear picture of the characteristics of the population, and choose a sample that reflects the range of different people in the group. The best way to do this is to select people randomly, work hard to persuade people to take part, and be open and transparent about how successful your recruitment was. The two main considerations for sample size are ensuring you cover the full range of types of services user, and reach a 'saturation point' in fieldwork: speaking to enough people that the same themes are being repeated and you are learning nothing new.

Analysis

Analysing and reporting on qualitative data is a very different process to analysing quantitative data because you are looking for patterns in words rather than in numbers. Two general recommendations are put enough time aside—good qualitative analysis is fairly time consuming; and think hard about your data—your aim as an analyst is not simply to restate what participants have told you, but rather to think across different interviews and to discern the key points of similarity and difference between them. An area of rapid development is text analysis software, which makes it possible to derive useful information from large sets of unstructured, natural language text data and enables qualitative analysis at a quantitative scale.

Ethical practice in research

It is extremely important to consider the ethical issues that might arise from conducting research—it can put both researchers and participants in a position of vulnerability. There are core ethical principles that research must adhere to, which need to be considered throughout the research process: Voluntary participation; Informed consent; Cause no harm; Protect participants' identity; Researcher neutrality; and Parsimony.

Conclusion

Simple changes can improve the qualitative research data that charities are already collecting, to make it more rigorous and therefore offer more value. Improving the credibility of qualitative research and data will also reduce the time and money wasted on poor quality research, be more acceptable to funders, and of course help charities improve their work.

Deep insights are possible through good qualitative work, which should challenge leaders, help them see things differently, and raise questions that can take organisations in new directions—all without too much investment. The key to quality in qualitative research is careful sampling, rigorous analysis, and researchers who follow ethical practices. None of this is beyond the reach of even the smallest of charities. A better understanding of what makes good qualitative research can help charities make their research efforts go further.

FOREWORD

At NPC we care about the impact that charities make and what can help them be as effective as possible. We talk a lot about the role of impact measurement in helping charities and funders improve and learn, but there is more that research can help with. While there is no substitute for robust, quantitative measurement and evaluation for assessing what impact a charity is having, that does not mean we should underplay the role of qualitative research in helping the sector understand and improve what it does more broadly.

Good, well structured qualitative research has many potential uses. It can help support operations and inject user feedback into decisions, sometimes in real time. It can help us understand why services are—or are not—achieving impact, something that quantitative research is not always able to do. It can take us a long way towards understanding what is really going on with beneficiaries, or in a programme or intervention, especially when quantitative approaches are not appropriate or possible. In addition we are starting to see new methods and analysis techniques advancing rapidly in this area—not least due to digital technologies, which make the potential of qualitative approaches ever more powerful.

In this paper, we explain why we think qualitative research approaches offer real benefits to charities that are exploring new possibilities and seeking to understand and improve their work. We also give some pointers on what good qualitative research looks like, which is a step away from the random anecdotes and 'stories' we have seen some charities provide.

We hope this encourages you to think about where qualitative research can help your work, so you can achieve more for your beneficiaries and for your mission.

Dan Corry

Chief Executive, NPC

INTRODUCTION

You could say stories are the most basic and important way that humans understand the world, and conversation offers an intuitive, unfiltered way of understanding a person's experience. Many find the idea of 'data' daunting, but words are a form of qualitative data. Qualitative research is focused on what things mean to people, and so it sits very naturally with the questions that a charity asks. Charities are often already collecting qualitative data through their service provision and staff interaction, and use this ad hoc to inform their ideas and check the experience of services. But they are not conducting qualitative research rigorously, with appropriate sampling and analysis—leading to it being dismissed.

We see this as a missed opportunity. When qualitative research is undertaken in a more systematic way, it provides valuable insight to help drive service design, delivery and improvement, and keeps user voice central to a charity's work and decision-making.

We have previously written about the role of research in impact measurement—our *four pillar approach* promotes the collection of both quantitative and qualitative data where possible and we often state: *'No numbers without stories; no stories without numbers*[1]*'.* While it is important for charities to illustrate their success by using quantitative metrics, they also need to understand how the results were realised, and ask how an approach could be adapted and improved. Good qualitative research answers those questions, which in turn helps ensure that any evaluation undertaken is useful to the charity, and that lessons are always learnt.

About this paper

This paper is designed to help charities better understand the role of qualitative research in informing a charity's decisions and helping it to identify what works. We outline the different ways qualitative research can be used at each stage of a programme or strategy cycle, and introduce five key principles underpinning good quality, rigorous qualitative research. We explore the practical questions of who can conduct qualitative research, how participants should be sampled and the simplest approaches to data analysis. Ethical questions are also considered, often a particular challenge for charities.

[1] New Philanthropy Capital (2016) *Stories and numbers: Collecting the right impact data.*

UNDERSTANDING QUALITATIVE RESEARCH

Definitions

The Market Research Society (MRS)[2] defines qualitative research as research where:

- the basic methodology involves techniques which seek to reach understanding through observation, dialogue and evocation, rather than measurement;
- the data collection process involves open-ended, non-directive techniques; and
- the data analysis output is descriptive and not statistical.

Qualitative data is therefore information, usually expressed in words, about people's thoughts, feelings, motivations, attitudes and values. It is obtained from qualitative sources such as participant observation, interviews, diaries and letters. It aims to give insight into what it is like to be in another person's shoes. Quantitative data, by contrast, is information in numerical form, such as statistics, percentages, tables and graphs.

Qualitative data seeks to understand in depth, and in service users' or stakeholders' own terms, why and how change happens. This allows us to understand a full range of answers and underpinning factors. Proper qualitative evidence is not anecdotal feedback, and it is not case studies that have been cherry picked to illustrate positive results—though these are common misuses that can result in scepticism about qualitative methods.

Credibility

Qualitative and quantitative methods are used to answer different questions, so whether a method is credible depends on the question being asked. Choosing the most suitable research approach also depends on the resources available to you, and how you are using the results. Whichever method is chosen, a rigorous approach to conducting the work is crucial to its credibility.

Role in evaluation

Qualitative data is a complement to quantitative data, not an alternative to it. Generally, a mix of quantitative and qualitative methods provides the most reliable and useful evidence.

Quantitative research, particularly if it involves good comparison data, is needed to estimate the *scale* of impact. Using a counterfactual (comparison group) is the most reliable means of establishing attribution, ie, that an observed effect is due to an intervention. Quantitative data is also necessary if you want to look at the costs and benefits of an intervention. Qualitative research does not do this, and so can not be used to claim *how much* impact has been have achieved across all service users.

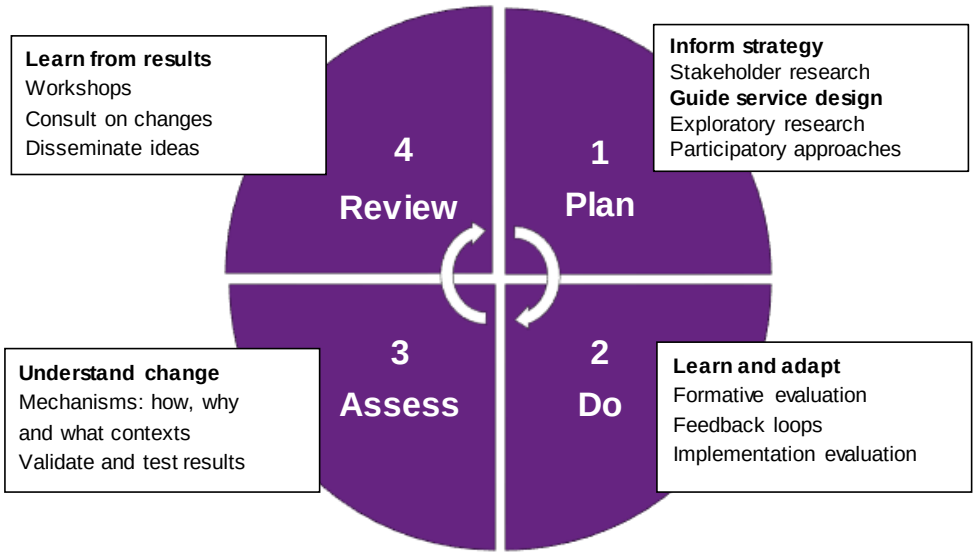
Qualitative research only provides indicative evidence of impact, but is still an integral part of good evaluations, as it is better at explaining *how* this impact happened. Moreover, these explanations can often be generalised, so qualitative research can help us learn how to maximise and replicate impact. To explore opinions, experience or what something means, qualitative methods are usually the most appropriate.

[2] Market Research Society (2011) *MRS Guidelines for Qualitative Research*.

WHEN TO USE QUALITATIVE RESEARCH

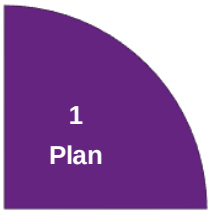
Qualitative research can reveal how and why people think and behave in particular ways, and so is useful at all stages of programme design and delivery, and as part of an organisation's strategy cycle too. In Figure 1 we have adapted Inspiring Impact's cycle of impact practice to indicate how qualitative data can contribute in different ways at each stage of development. We then explain this is more detail, going through the Plan, Do, Asses and Review stages in turn.

Figure 1: Qualitative research across a programme or strategy cycle



Adapted from *The Code of Good Impact Practice*.[3]

Plan



Using qualitative research to help with organisational strategy, to explore the issues a programme aims to address, and to design a programme with users in mind.

Interviews or workshops with stakeholders and beneficiaries to get their perspectives on the role a charity is playing, what it could change or improve, and where it might go next can support strategy development and business planning.

Example: Comic Relief commissioned research with influential stakeholders who had been involved in the concept and growth of the charity over a 30 year period. They shared perspectives on what its successes had been, where its weaknesses lay, and gave recommendations on what Comic Relief could seek to do in future.

Exploratory research to inform service design is useful when a charity needs to understand a social problem or beneficiary group better, so it can design a service to suit that area. There are two gains here: understanding the context for delivery better, and hearing what beneficiaries think is needed. Exploratory research is very common in public service delivery or other government interventions, because it provides insight into how different types of

[3] Inspiring Impact (2013) *The Code of Good Impact Practice.*

individuals feel, behave and make decisions. A service can then be designed in a way that has the best chance of meeting their various needs, or encouraging them to act in the way the service deliverer thinks is best for them.

Example: Motiv8 addiction services, a charity working on the Isle of Man, wanted to explore pathways to addiction and recovery. Their research used qualitative biographical interviews with 51 adults who had experienced addiction to alcohol or other drugs and who lived on the Isle of Man. The research was carried out by Motiv8, supported by Natcen, a professional research firm. Participants were recruited by Motiv8 through adverts and word of mouth, with purposive sampling to cover the breadth of the population's characteristics. As the charity was targeting a hard-to-reach group, this sampling approach was necessary. Researchers were local people, recruited by Motiv8 and trained by Natcen. Biographical interviews let researchers trace individual pathways, helping reveal the complexity and diversity in experiences of addiction. This helped Motiv8 and other agencies think about the support they provide to their clients, and identify broader changes which could help people who are trying to recover.

Participatory approaches to developing a service involve beneficiaries in more than just initial research, using workshops and continued consultation to help ensure programmes reflect user need. This can be a valuable way of ensuring a service's fit, and of creating buy-in and a shared stake in that service. It is also likely to generate good ideas that charity staff would not think of on their own.

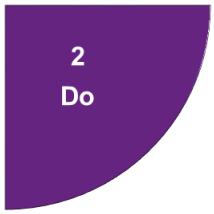
Example: Young people from MAC-UK's Integrate projects became 'research consultants' in the Centre for Mental Health's evaluation of the project. This involved interviewing other young people to find out what their challenges were so that the programme could meet their needs. With the Centre for Mental Health researcher, the research consultants undertook a 'community mapping' exercise, identifying all the existing assets in the area, and where there were important gaps. These findings were used in the programme design.

'Being so involved in this work engaged young people in the evaluation as it demonstrated the value of evaluating the project.'

Researcher, Centre for Mental Health

Youth trainers from The Integrate Movement (a social enterprise and sister project of MAC-UK) also worked with researchers from the Centre for Mental Health to decide on a standardised way of measuring mental well-being within the projects. This included a workshop where participants explored what mental health meant to them and what impacted well-being. The work helped researchers ensure they were tracking change in well-being over time in the projects in a meaningful way to both the young people participating, and funders and commissioners.

Do



Using qualitative research to develop and refine a programme as you go, and to build an understanding of the success factors behind programme results.

A programme or service is rarely perfect on day one, while long-standing services sometimes need to adapt in response to changing needs and conditions. Qualitative feedback from beneficiaries and staff is a quick, low-key way to test and refine a service in its early stages.

Formative evaluation is a formalised evaluative approach, aiming to give early feedback that can shape the approach to delivery of the main phase of a programme.

Example: NSPCC's Baby Steps programme used qualitative interviews with a range of practitioners and service users at an early stage in development to explore whether the first signs of the service approach were promising. NSPCC trained researchers to conduct this work, and they quickly uncovered issues with the initial approach, so used further interviews to find out what participants thought would work better. Those findings were used to

redesign the service, which was rolled out on a larger scale. The evaluation of the main stage roll-out showed the programme to be extremely successful. The changes made based on the qualitative research were crucial to this.

'Not only was the data used to inform changes to the content and structure of the programme, but also to inform the selection of standardised measures for the impact evaluation. It was also useful in identifying how different groups of parents were experiencing the programme.'

Denise Coster, Senior Evaluation Officer, NSPCC

Continuous feedback loops of learning and adaptation can be necessary in more complex, fast-changing or unstable settings. During delivery, rapid research responses from beneficiaries and staff can drive adaptations to build a service that stays well-tuned to its users and operating environment.[4] Qualitative feedback can also be used in combination with other data sources, such as monitoring or case management data, to explain glitches or problems with a service, allowing the programme deliverer to make those changes immediately.

Example: The Protect and Respect study at NSPCC combined secondary desk research, organisational experience and primary qualitative research to build a programme. Because very little evidence existed on the area of protecting young vulnerable people from sexual exploitation, the team needed to draw on all sources of knowledge available. They needed to start delivering services, but did not have a good understanding of the need and context for it. This meant they relied on using qualitative research alongside service delivery, to build services based on what they were discovering, and change and alter them as their knowledge improved.

'Qualitative research is very important where you don't have a clear sense of the concepts that exist in the area. It allows you to explore people's perspectives in their own language and tap into their own concepts… it helps you map out and get texture about what is going on.'

Matt Barnard, former Head of Evaluation, NSPCC

'Process' or 'implementation' evaluation focuses on how a programme works. There is an increasing recognition that how something gets delivered, ie, whether plans are followed properly, is just as important as what gets delivered. A great idea, poorly executed, will be less effective than a standard idea, delivered well. Ongoing feedback focused on whether plans are being adhered to properly, or whether plans need to change slightly, is therefore a good use of resources. Questions about 'how' are best suited to qualitative research, based on descriptions and analysis by the practitioners and beneficiaries who are involved in it. By identifying the mechanisms of change, and the conditions that affect it, it improves understanding of when and why something is working or not, whether and how results could be replicated elsewhere, and gives insights on how to improve it. This type of research should be undertaken from the start of the programme and continued alongside it, tracking activities as they occur. The findings are fed back as soon as possible, so they can be used to improve the programme as it develops.

Example: The Child Outcomes Research Consortium (CORC) aims to foster the effective and routine use of outcome measures in work with children, young people, and families in child and adolescent mental health services (CAMHS). They are conducting an internal qualitative evaluation of how the CORC approach is being implemented in voluntary sector services. They will interview service providers about their use of the CORC approach and their experiences of support from the CORC team in engaging in the routine use of outcome

[4] The term 'adaptive development' is used in international disaster relief settings to refer to this model of service delivery, in which a service approach is introduced into a new setting, and depends on rapid feedback to adapt the model to fit the local context. There are useful parallels in domestic settings, where a service must be delivered in a new setting. In UK government, a 'test and learn' approach to rolling out and refining services is quite common.

measures in their work with young people. The CORC management team will review findings at three points and present these to the CORC board, along with recommendations on proposed operational or strategic responses.

'The evaluation will increase understanding of strengths and areas for development in CORC's approach to supporting the routine use of outcome measures—specifically in a voluntary setting. This will enable us to tailor our interventions for voluntary providers.'

Rose Palmer, External Communications Manager, Anna Freud Centre

Assess

Using qualitative research to understand the results of a programme.

The best approach to assessing the impact of a charity's work will depend on the circumstances the programme is operating in, the resources available and the audience for the evaluation. NPC's *Four Pillar approach*[5] describes the different methods that can be used to assess the impact of a programme. Generally, a mix of quantitative and qualitative data is the most reliable and useful approach to evaluation. While quantitative and comparative data show the extent of a programme's effect, the role of qualitative research as part of a mixed methods study can be used to:

- Explain quantitative results. Quantitative data will indicate whether something is working, and qualitative data will tell you how, why, and in what ways an intervention has made a difference. Quantitative results that are hard to understand can also be followed up with qualitative research to explain surprising, contradictory or unclear findings.
- Capture the mechanisms for change within a programme: the 'missing middle' between intervention and impact, which is key to being able to replicate or scale a programme.
- Inform decisions on what to alter or how to improve by identifying the factors influencing what went well and less well, and for whom.
- Provide evidence to suggest whether this can be expected to work elsewhere, by focusing on the context in which the intervention occurred. Explaining the context shows how the environment, conditions and particular people influenced what happened. It also helps determine which elements of a programme would transfer when replicated, and which may need to be altered.
- Establish links between a programme and a given change for beneficiaries, thus reducing uncertainty about its contribution, and strengthening the evidence for its effect. This is especially important where there is no control group for the programme. Researchers can find out about other things happening in beneficiaries' lives which could have contributed to—or hampered—the changes seen.
- Test and corroborate data from other sources to improve the rigour of the results (known as 'triangulating' data). This is an important way to strengthen the quality of evidence.
- Explore what changes mean to beneficiaries in order to check the programme works as intended. This forces the charity to check its assumptions about the role it plays in beneficiaries' lives. Qualitative data can explain how intended outcomes are realised in practice and how they are understood by participants, especially important for non-material impacts like increased social capital, empowerment and social inclusion.

Example: NPC co-delivered a small-scale evaluation with Imara, a small, early intervention service for young people and safe family members following disclosure of child sexual abuse[6]. Qualitative interviews of Imara's beneficiaries were combined with analysis of police data. This identified an association between Imara's support

[5] New Philanthropy Capital (2014) *NPC's four pillar approach: Building your measurement framework.*

[6] New Philanthropy Capital (2015) *Support after trauma.*

and the higher likelihood of the case being taken to court. It also identified development needs in the outcome data collection undertaken by Imara.

There are also specific qualitative methodologies well suited to understanding impact: longitudinal research and case studies.

Longitudinal qualitative research shows change in individuals over time, and sees how a service has affected people, by speaking to the same people more than once. This provides rich information on how and why something changes over time, meaning there is more scope to find stronger evidence of impact. If the project is relatively light-touch, you may only need to interview people twice—once before and once after the service. However, ideally, and particularly for more intense work, you will speak to them before, during and after, with a follow-up some months later to assess long-term change. A small qualitative sample of users can be enough for a small longitudinal study, though larger samples provide greater understanding of the population as a whole. The challenge comes in maintaining contact with those individuals, because they cannot be substituted for other people.

Example: Solace Women's Aid found that, although crisis interventions for women and children experiencing domestic violence are well developed, little was known about the process of rebuilding lives and what longer term support needs might be. Working in partnership with the Child and Woman Abuse Studies Unit at London Metropolitan University, they tracked 100 women and their children over a three year period (2011–2014). Women were recruited into the study after exiting a range of domestic violence services provided by Solace and, through four waves of interviews, their onward journeys were followed.

'For the first time we have research and an evidence base to support the development of effective interventions to support women and children affected by domestic abuse. It clearly shows the ongoing abuse faced by survivors post separation and the need for longer term work to support them on their journey to independence—something that is not recognised in current commissioning frameworks.'

LJ Winterburn, Operations Director, Solace Women's Aid

Case-based approaches entail the researcher systematically choosing cases, then exploring them in real depth to reveal how changes occur in context. This can be solely qualitative, but is ideally undertaken using quantitative and secondary data too. They must capture a wide spectrum of experiences of the service users or professionals, not just the cases in which the project worked best. To create credible case studies, the researcher chooses a small sample of cases randomly or according to certain criteria. They then use other methods to gather more information about each selected case. The aim is to build up enough information to create a rich description of how the project has or has not affected the individuals, reasons for change, and other factors that are important.

Review

Using qualitative methods to reflect on results and discuss implications for the programme or organisation.

However well designed and conducted, research evidence is of very little value unless it gets used. Exploring what a set of research findings mean, and how the programme or organisation should respond, is a crucial stage in the 'impact cycle'. It very easily gets lost along the way if it doesn't fall to any one individual, while it can be difficult to accept and take the messages from evaluative work on board. Qualitative approaches to facilitating internal group discussions can be used to bring staff together to discuss the practical lessons from the findings. Closing this 'feedback loop' between review of results and the next strategic planning stage helps the charity work out what it should do next, where it should allocate resources, and what changes it might seek to make.

Learning workshops involve taking programme results and using them as a stimulus to discuss programme changes or strategic priorities. This is a good way of making staff or decision makers engage with findings. Facilitation tools can be used to structure discussion, and gain different people's perspectives. This can be helpful where difficult findings need to be absorbed and discussed by key stakeholders.

Example: The Royal Pharmaceutical Society (RPS) commissioned an evaluation of new regulations for pharmacists, which suggested more needed to be done for the regulations to work effectively. The RPS held an 'open space' workshop for stakeholders, where they presented the findings and highlighted three questions the findings raised. The workshop allowed people to digest and accept the results, and used the findings as a stimulus to encourage stakeholders to think about what they could do to resolve them. The workshop ended with a series of suggestions for several key organisations which were agreed and taken forward.

Participatory feedback and workshops including beneficiaries or service users can also help decision-makers to see things differently, and bring the findings home. This offers a richer, more personal story of change, and of challenge.

Example: The National Children's Bureau evaluation of Independent Reviewing Officers (IROs)[7], who represent the interests of looked after children, convened young people to discuss the findings emerging towards the end of the study. There were differences between what the children thought the conclusions should be, and what had been written. The researchers wrote up the debate, which helped policymakers to understand the trade-offs between different policy recommendations. The children were also involved in the presentation of results at the House of Commons. They acted out real scenarios described in the report, to an audience including influential stakeholders from the Department for Education and Nuffield Foundation.

'Children provided a very important, critical perspective on the findings. Key messages from the research were much more powerful and more likely to get noted because children were involved in the dissemination.'

Ivana La Valle, Researcher and report author

Disseminating findings through film and other media is possible with qualitative data, and can draw on individual cases to communicate rich, more personal stories of change. This can help convey compelling ideas, connect with beneficiary voices, and reach much wider audiences.

Example: The IMPACT-ME project at Anna Freud Centre sought a better understanding of young people's varied experiences of depression, and the experience of their parents. The project involved a 'participation group' of young people with depression, and parents, who helped guide the work and contribute to analysis. Members of the group then co-produced films which brought the findings to life for a wider audience, and put their voices at the heart of the report. The findings helped service providers understand experiences of depression, offered insight into what could stop people from seeking help, and showed what aspects of therapy young people find helpful and what aspects they do not. For other young people and their parents, the IMPACT-ME films helped increase understanding, reduce stigma, and encourage young people to realise that they are not alone.

'I think [this film] is needed because it's not a very open subject. A lot of kids might not realise they are depressed until they watch because depression comes in all types and forms. Depression is not bog-standard, it's different for every person. It's important for them to watch the movie and realise that…This film is different because it is our own personal stories and we have put our twists in there.'

Lauren, aged 18, film participant

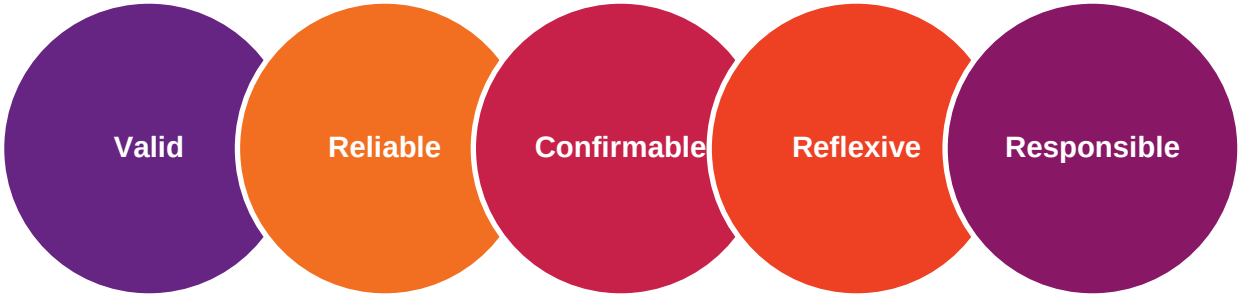
[7] National Children's Bureau (2014) *The role of Independent Reviewing Officers (IROs) in England.*

KEY PRINCIPLES FOR GOOD QUALITATIVE RESEARCH

What is good quality in qualitative research?

Good quality or 'rigour' in qualitative research means research that has been undertaken in a systematic and carefully considered way, with a clear, defensible explanation of the approach and how the researcher(s) arrived at their findings. In Figure 2 below we identify five key principles. Considering these should help ensure that your research is meaningful and has credibility with an external audience.

Figure 2: Five principles for good qualitative research



1. Valid (validity)

The data and findings are meaningful, so the research can answer the questions being asked in a relevant and accurate way.

Trustworthiness is another way of describing this—the findings produce a credible, defensible result. The term validity appears a lot in research, and refers to a few different issues, or principles. If the researcher properly depicts the setting in which the research took place, others can judge whether those findings would apply to their own settings.

In practice: Understanding what participants mean and conveying that accurately and effectively requires constant discipline. It helps to:

- Record interviews rather than take notes, so what gets said is accurately recorded.
- Structure the approach to data analysis in a way that uses the full data set, rather than using specific interviews to develop findings.
- Use participants' language when reporting findings.
- Describe the context/environment the work was undertaken in. The more you do so, the easier it will be for another charity to consider whether the findings are transferable (likely to apply) to their own setting.

2. Reliable

There is a clearly documented research process and approach to data analysis that shows how those findings were achieved.

Reliability is also known as dependability. It means being transparent about what you did and how you reached those results. Explaining the conditions the work was undertaken in gives a more accurate view of why that set of findings may have particular characteristics.

In practice: It is important to clearly report the methodology used, so someone else can see how the researcher got from A to B. If someone were to read the approach taken and look at the data collected, they should be able to trace back the activities and logical inferences that were taken to reach the findings. This helps defend the work.

3. Confirmable

The findings have been corroborated through different sources.

In practice: Greater objectivity is gained by building different people and data sources into the analysis process:

- Compare and bring together different data sources (triangulation).
- Involve several people in data collection and analysis, to avoid one person dominating.
- Ensure credibility with participants by sharing the findings with them. They should recognise the contributions they made.

4. Reflexive

Biases are managed through careful research design and researcher care.

Bias is any tendency which prevents unprejudiced consideration of a question. As qualitative research involves subjective judgements and interpretations, bias cannot be 'removed' from the process. But you do not want to be blinded by preconceived ideas. There should be the possibility of surprise in social research—as suggested by Firebaugh in *Seven Rules for Social Research*[8]. Otherwise, you will fail to look for contrary evidence; not recognize contrary evidence when you encounter it; or recognize contrary evidence but refuse to accept these findings for what they appear to say.

Two particularly important sources of bias are:

- Selection bias (in sampling participants)—this means you are interviewing participants who do not reflect the wider population. This is also known as 'cherry picking'. It is extremely important that your research can be defended against this charge (see Sampling in the next section).
- Researcher bias—individual researchers carry their own experience and perspective, which colours how they see the issues. When a qualitative researcher conducts research, they need to think about how they are influencing the interaction and keep their own views and behaviours in check.

In practice: Managing bias is a constant discipline throughout the research process. Most importantly:

- Use rigorous, transparent sampling and recruitment with careful controls around how participants are selected to cover the range of experience.
- Use trained researchers who are skilled in neutral questioning and analysis.

[8] Firebaugh, G. (2008) *Seven Rules for Social Research.* Princeton University Press.

5. Responsible

Research provides a responsible portrayal of beneficiaries and the cause.

Charities often work on sensitive issues, with beneficiaries in situations of some vulnerability. As such, the way they use qualitative research to represent beneficiaries needs serious consideration. As yourself: Is the portrayal of those beneficiaries respectful and accurate? Could it be construed as marginalising or exploiting their stories?

As beneficiaries may be willing to participate in research and be led by the charity, it is the researchers' responsibility to think hard about how beneficiaries' personal experience and their identities are being used in the research and reporting.

Checklist: What good qualitative research looks like

We sometimes come across misapprehensions about qualitative research in the charity sector, so the table below highlights some examples of good and bad quality. Broader good practice principles are covered later on in this paper.

Good qualitative research	Not good qualitative research
Methods that enable you to discuss/observe things in detail (eg, interviews, group discussions).	Free-text boxes at the end of a questionnaire or 'happy sheets'.
Sampling to ensure a reasonable representative group of service users is included, and that the breadth of experience is reflected. In particular, reaching those who are less engaged with a service or less willing to take part in research.	Opportunity sampling or 'cherry picking'. Just talking to people who are around or who complete an intervention. Collections of anecdotes.
Stories that describe both the typical and the range of experiences of service users, providing a more balanced view of what is achieved.	Marketing case studies. Stories about people who most dramatically illustrate the needs and benefits of a service.
In-depth analysis and consideration of data. Looking for themes and issues that improve our understanding.	Collecting quotes/anecdotes just to include in a report.
Reports designed to persuade people of the need for a service.	

CHOOSING RESEARCHERS, SAMPLING PARTICIPANTS AND ANALYSING DATA

Who can do qualitative research?

The decision about who does the work should depend on:

- the charity's research capacity;
- whether an independent perspective is needed;
- how important external credibility is; and
- whether this is a one-off exercise, or will be something the charity does repeatedly.

There are three options for charities when conducting qualitative research:

1. Conduct in-house, with internal expertise.	2. Commission an external provider.	3. Conduct in-house, with external support at key stages.
• Ideal at all stages of the impact cycle if staff have the skills, capacity, and are credible to their audience.	• Good for complex and one-off research studies, and where an external, independent voice is helpful.	• Optimal for organisational learning and capacity building; support may be sought for design and analysis.

We find that not many charities go for option three—conduct their own work with expert support—but it's an approach that should be considered more often. Staff will learn more and it saves on costs, which offers a pragmatic compromise on quality and credibility.

There are two stages when external expertise is most needed: for the **research design and sampling approach** and the **analysis approach**. These tend to be the areas that charities, or those who don't often do research, find most challenging. Of course, interviewing and observation are also skilled activities, but it is relatively easy to train people in qualitative interviewing at low cost. It is always worthwhile getting advice from experts when designing an approach for the first time.

When it comes to assessing impact and conducting evaluations, people often assume independence of the evaluator is important to credibility and avoiding positive bias in results. While this is a good argument, one can overstate the value of an independent evaluator. There are also benefits to keeping evaluations internal, such as greater access to information and data, and more influence on staff and decision-makers. More detailed support and guidance to help decide the role for internal and external evaluators is available from Better Evaluation[9].

Sampling—or choosing who to talk to

When doing qualitative research you do not need talk to everyone—you only need to talk to enough people to gain an accurate view of everyone's experience. The process of choosing who to talk to is known as sampling and it is an important part of the qualitative research process.

[9] http://betterevaluation.org/resources/guide/program_managers_guide_to_evaluations

Samples in qualitative research are smaller than quantitative research because the aim is to understand things, rather than measure them or assess the scale of impact.

However, this last point is a weakness in a lot of qualitative research conducted by charities—namely that not enough effort is taken to make sure samples are typical or representative. For example, if you have 20 students but only talk to the 5 who complete the course, then your research is biased because it does not include the views of those who were less engaged; and is less useful than it could be, because you will not get information on how to improve.

Sample selection

To do good quality qualitative research it is vital to ensure your sample resembles the whole group as closely as possible. This means that you cannot rely on those volunteering to take part because they are unlikely to be typical. In contrast, a good sampling strategy consists of:

- Starting with a clear picture of the characteristics of the population you are researching, so that you can check your sample against this profile (eg, split between men and women, different age groups, different levels of engagement in the programme).
- Choosing a sample that reflects the range of different people in the group. The best way to do this is to select people randomly—for example one in every ten of your service users. Alternatively, you could chose the group that you are most interested in, but you will have to be clear that you have taken this approach (technically this is known as purposive sampling).
- Working hard to persuade people to take part, making particular efforts to engage those who do not volunteer themselves to be consulted.
- Being open and transparent about how you chose your sample and how successful you were at recruiting people with different characteristics.

For evaluations, a particularly good research design applicable to a wide range of charitable work is to take a random sample of people as they sign-up or are referred to a programme, and then interview them two or three times as they progress through it. The random selection of service users means that you hear from both successes and failures, giving you more representative and more valuable findings.

Sample size

Although you do not need to speak to as many people for qualitative research as you do for quantitative research, sample size is still an important question and will vary depending on the research question, the population of interest, and your budget. The aim is to achieve breadth: to have covered all the important sources of variation and similarity in among the population. The two main considerations are:

- Ensuring you cover the full range of types of services users and viewpoints that you are interested in.
- Speaking to enough of each type of service user to reach a ‘saturation point’: the point when they have spoken to enough people that the same themes are being repeated and you are learning nothing new.

In practice, this can mean that 10–20 interviews with a broadly representative group might be a good enough qualitative sample size for a small study. However, you would need to increase this number substantially if you wanted to make the study more robust, explore differences between sub-groups, or if the population has diverse characteristics or views.

Analysing qualitative data

Analysing and reporting on qualitative data is a very different process to analysing quantitative data because you are looking for patterns in words rather than in numbers. What some people find particularly difficult, and a

supposed weakness of the approach, is that qualitative analysis is more obviously based on *interpretation* than quantitative analysis. In other words, what we make of the words and stories we have collected is very much down to us and our ability to summarise it accurately and insightfully.

A lot has been written about qualitative analysis and there are a wide range of formal techniques you could adopt. We do not go into these in here but you are welcome to explore the literature on the topic (see Appendix 2). Two general recommendations are:

- Put enough time aside—good qualitative analysis is fairly time consuming.
- Think hard about your data—your aim as an analyst is not simply to restate what participants have told you, but rather to think across different interviews and to discern the key points of similarity and difference between them.

Below is a brief outline a general approach you can use.

The first step is to take good notes either during or immediately after an interview or group discussion. If possible, it can be useful to record discussions (with permission of those taking part) and have the recordings transcribed.

If you are working with other researchers on the project then a great way to start is to hold an analysis meeting to consider the findings and themes coming out of the research. Alongside this you should try to read all of your transcripts or notes, noting down anything interesting. Try to break down the sample into different segments (eg, engagers versus non engagers, different characteristics of users or stakeholder type) and look at how the findings might differ. Think about different themes—what seemed important? What have you learned?

A good next step is to create a set of themes and/or questions to categorise the data. You may already have an idea of some categories you want to investigate—for example, positive or negative attitudes toward an aspect of your service. This should be followed by a second close reading of the data to help you apply the categories that you developed and identify things you may have missed. You can tag extracts of text in your notes or transcripts against different themes, labelling them physically or creating a sortable spreadsheet in Excel. Specialist tools such as NVivo[10] may help (partner academic institutions and researchers may have access to these tools). Through this process you should see patterns and trends emerging and start to collect good text extracts or verbatim comments that you can use to illustrate the findings when you write them up.

Once you have some early findings it can also be useful to present them to staff members, volunteers and researchers to get their feedback.

The final stage of the process is to combine qualitative findings with other data you have and write it up into a report. There is not the space here to discuss the reporting process in detail, but we recommend looking at some of the examples of qualitative research cited in this report to determine what level and type of reporting will best meet your needs.

A thorough process, like the one outlined here, can lead to better insights about a user group's unmet needs or what impact has occurred from a service, how it has occurred, and the areas in which your service can improve. Furthermore, being able to describe how you have taken a systematic approach to analysis will make the research more compelling.

Tech-enabled analysis

Approaches to analysing data held digitally are increasingly accessible to charities through text analysis software tools. This is an area of rapid development which offers ways to make better use of existing data that would otherwise go underused, and provides new ways to gather digital data outside the organisation.

[10] http://www.timberlake.co.uk/software/nvivo.html

Text analysis involves using computer processing techniques to automate the coding of unstructured text data, which would otherwise be conducted manually. This makes it possible to derive useful information from large sets of unstructured, natural language text data. It also enables qualitative analysis at a quantitative scale, as it identifies and quantifies the main themes, finding structure and patterns in the data. Text analysis also allows us to integrate the analysis of disparate data sources. Combining and triangulating these different types of data can enhance the analysis and additional insights that can be found.

The main sources of unstructured data that can be analysed in this way are:

- Service delivery data eg, case management information, held by the organisation.
- Emails or online communication with service users or staff, held by the organisation.
- Open-coded verbatim data from quantitative survey responses, held by the organisation.
- User-generated 'social' data from social media, blogs, etc, external to the organisation.
- Data exhaust, or 'big data': digital data produced through service users' other transactions and activities, external to the organisation.

The main types and uses of text analysis are:

Semantic, sentiment or linguistic analysis uses language and grammar rules to identify the sentiments expressed in the text, such as whether something was good or bad. It is also used to classify and categorise the data. This is useful in gathering service user feedback, or taking the temperature of opinion on an issue by undertaking social media analysis. The techniques involved are simple and inexpensive, though the quality of outputs depends on the sophistication of the coding framework. It has often been found hard to detect sarcasm, for example.

Unsupervised analysis, also known as descriptive or undirected analysis, involves automated searching for any patterns or connections in the data—for patterns, themes and clustering between groups of words and phrases in the data. There is no pre-existing template; it does the work of the analyst, by classifying and sorting data. This is akin to exploratory qualitative analysis, from which the analyst can develop categories for the themes emerging in the data. This identification of themes and patterns can be used to develop a categorisation framework. Applying the framework to the unstructured data results in the quantification of themes and the possibility to analyse the relationships between them.

Supervised analysis, also known as predictive or directed analysis, starts with an analytical template for categorising and classifying the data, which provides an automated model to apply to the unstructured data. The analyst is creating a predictive model, in which automated analysis of text data can get fed straight into the service delivery system. Predictive analytics—learning from historical data to make predictions about the future and to support decisions—has been applied with great results by some charities in the UK already, such as the Medway Youth Trust. This should be a fast-growing trend.

Many research businesses provide analytics solutions, and there are a number of open-source software text analytics tools available too, such as GATE or SAS text miner.

We are also seeing advances in the capabilities of information systems to automate the analysis of audio and video data using computer vision and pattern recognition techniques. While these techniques are currently being developed in academic circles rather than in mainstream practice, we can anticipate they will become increasingly accessible. As with text analysis, these techniques can be applied to internal data, such as interview footage, which unlocks another source of 'passive' data to get analytical value from it. For charities with significant video and audio data, this could have many benefits. They can also be applied to the external, passive data.

Further developments in data capture, measurement and analysis will be explored in more detail in our forthcoming paper on innovations in measurement.

DOING IT RIGHT: ETHICAL PRACTICE

It is extremely important to consider the ethical issues that might arise from conducting research. Research can put both researchers and participants in a position of vulnerability, and it is crucial that those planning the research consider all the potential implications of the work on beneficiaries and staff.

There are core ethical principles that research must adhere to, which need to be considered throughout the research process. These will apply in different ways in each different project, and need repeated consideration as a project progresses. For more information see the MRS code of conduct[11].

Voluntary participation

Participants must understand nobody is obliging them to take part, and they can leave at any time. People often feel that they must participate in an interview, particularly if the researcher is an authority or professional figure, or from an organisation that the service user depends on. It is extremely important they understand there is no obligation to participate, and participation has no bearing on their access to services or to their treatment in any way. This is important even if it creates additional challenges when trying to speak to people who are disengaged.

Informed consent

Participants must understand what the work is for, their role, and how it will be used. As with other research methods, it is important to gain informed consent from participants in qualitative research. You should inform people about the purpose of the research, how the data will be used, and ask for their agreement to take part. They also need to understand that they are free to stop the interview any time they choose—so they can withdraw their consent at any point.

Cause no harm

Participants must not leave feeling upset. Going over difficult or emotional experiences can easily trigger reliving of traumatic episodes. Only highly trained researchers should be used for subject matter which could affect the well-being of the participant if handled by somebody without the expertise. If sensitive issues are to be discussed, the researcher should prepare by taking information about sources of support and advice available to the participant. They should ensure they do no leave the participant in a worse emotional state than when they began.

Protected identity

Participants need a guarantee of the privacy of the information they give you, so you must consider how you will protect participants' anonymity when designing the research and before an interview starts, to decide if it is ok to go ahead with it. Information is often extremely sensitive. There are many risks related to handling information. It is the researcher's duty to protect their data from getting into the wrong hands. Nobody except the research team should have access to the data, and nobody except the research team should be able to find out participants' identities. To help with this:

[11] https://www.mrs.org.uk/standards/code_of_conduct

- Consider the location where the research will take place. Will other people be within earshot?
- Think about how many people there are in this particular group—could their story could be identifiable to others because there are few people in this situation? If you believe that this could be found out, you should either not carry out the research with the person, or agree you will not use any of the data that could identify them.

It is often impossible to provide complete anonymity for people since many methods require direct contact with the person conducting the research. Ensuring that responses are kept confidential—changing names to identification numbers, for example—can help you get around this. It is important to make clear to the participant how the data will be used. Personal data like names and addresses must be stored according to the Data Protection Act 1998. For further information, see our guidance on data protection[12].

Researcher neutrality

Participants will sometimes disclose information which could potentially be very sensitive. It is a researcher's responsibility to make sure the research doesn't harm the participant, but it is equally important to remain objective. Generally speaking, the researcher should be neutral. There is a big difference between research and therapy. The purpose of research is typically to increase understanding of an issue. It is not the researcher's responsibility to offer support, advice, or to try to solve problems at this time. Attempting to do so muddies the water, changes the agreement, and could unintentionally cause great damage as the researcher may not be able to fulfil a therapeutic role. It also creates a very unequal power dynamic between the researcher and the participant.

Parsimony

'Only research what you need to know'. It is not fair on participants to collect any more of their personal data than is needed to answer the main research question, as it takes their time and effort, and puts information personal to them into the hands of other people. This applies to the overall methodology, sample size, and data collection approach, as well as to an interview situation.

[12] New Philanthropy Capital (2015) *Protecting your beneficiaries, protecting your organisation*.

CONCLUSION

Simple changes can improve the qualitative research data that charities are already collecting, to make it more rigorous and therefore offer more value. Improving the credibility of qualitative research and data will also reduce the time and money wasted on poor quality research, be more acceptable to funders, and of course help charities improve their work.

Deep insights are possible through good qualitative work, which should challenge leaders, help them see things differently, and raise questions that can take organisations in new directions—all without too much investment. Those insights may prove crucial to future service provision, new innovation, and the ability to respond to changing social needs.

The key to quality in qualitative research is careful sampling, rigorous analysis, and researchers who follow ethical practices. None of this is beyond the reach of even the smallest of charities. A better understanding of what makes good qualitative research can help charities make their research efforts go further. When properly conducted, charities can have confidence in the validity and credibility of this form of evidence, and can reap more benefits from a fairly accessible set of methodologies.

Read more about our impact measurement services here and look out for our upcoming measurement seminars and training events.

If you'd like to discuss your research approach, or require further information about our services, please get in touch via info@thinknpc.org.

APPENDIX 1: OVERVIEW OF MAIN QUALITATIVE METHODS

There is a huge range of different ways to conduct qualitative research, which allows you to be creative in the approach you take. The most common methods—interviews and discussion groups—are enduringly popular because of their versatility for exploring different questions. Observations are most useful in early exploratory research and as part of evaluations, but is often found to be the most demanding for a researcher and difficult to do without extensive training and specialism. We are excited by the tech-enabled qualitative research approaches entering the sector, which are helping participants' own voices to be heard in new and unfiltered ways. We outline the key methods below, and the ways they can be used.

Interviews

What it is:

A 'conversation with a purpose', an interview follows a rough structure, and takes place face-to-face or over the phone. They allow you to gather detailed, personalised information on attitudes, motivations, beliefs, ideas, experiences and behaviour, and the reasons for these.

Good for:

- Interviews with different people allow you to map out a range of experiences quickly.
- Allow geographic coverage with lower cost when conducted over the phone.
- Going into depth, so you get a good understanding of individual perspectives.
- Approaching sensitive topics.
- Paired depths (where the researcher talks with two people who know each other) are good where participants may need encouragement, or to build ideas in discussion with a peer.

Limitations:

- They are time consuming and therefore costly.
- They can be intimidating for people who may feel 'put on the spot'.

Focus groups

What it is:

A discussion among a group, facilitated by the researcher. Groups can be anywhere between 3–10 people. Generally, 4–8 is optimal for discussion.

Good for:

- Understanding points of debate, group dynamics and social norms—useful for similarities or contrasts in experience.
- Generating ideas for service design, changes or improvements.

- Creative development, achieved when ‘Co-creative’ groups focus on generating or testing ideas, to develop services and/or communications material. This often involves using materials and exercises as a ‘stimulus’ to help people respond to ideas, and take an active, constructive role in the design of a service or experience.
- Lively and interesting discussions.

Limitations:

- Participants influence each other, so their statements cannot always be taken at face value.
- Results cannot be analysed at the individual level.
- Can be superficial—discussions move fast, so do not go into granular detail.
- Not good for sensitive topics.
- Discussions are often dominated by the most vocal participants, and quieter individuals need strong support to speak up.

Workshops

What it is:

A stakeholder or staff workshop has many elements in common with a focus group, as a selected group of people are brought together for a facilitated discussion which covers specific questions or areas to be explored. Similarly, materials may be used as a ‘stimulus’ for discussion. We describe it separately here, because the emphasis is less on data collection, and more on the process and the ideas or decisions that get generated as outcomes of the discussion.

Good for:

- Bringing stakeholders together to reflect on findings.
- Generating suggestions for next steps.

Limitations:

- It may be more difficult for an internal figure to lead the workshop as they have their own views and relationships with the participants (as colleagues, partners, or funders for example)—an independent facilitator may be more impartial.

Online groups and communities

What it is:

Convening participants on a digital platform where they respond to discussion questions and other materials. They can be synchronous or asynchronous. Synchronous means that it is ‘live’—everyone participates at the same time, more like a focus group, with the moderator guiding discussion. Asynchronous means the group is ‘open’ for a specific period, eg, one night, one week or one month—and participants dip in and out of conversation threads when they choose. This will generate different data than if people were physically present, and has specific advantages and disadvantages.

Good for:

- Accessing people who are geographically remote.
- Convenience—not just happening in one time or place so good for busy people.
- Greater anonymity—useful for discussing sensitive subjects with more confidence.

- Encouraging deeper thinking—people can mull over topics and develop and discuss their ideas over a longer time frame.
- Giving the moderator the opportunity to move between individual and group discussions. This means they can ask questions that require individual private responses that only the moderator sees, and others that are open for discussion between participants.

Limitations:

- The researcher remains at a distance—the more detached they are, the harder it is to gauge how people respond to the discussion.
- This makes it harder to build trust and to bring energy to the discussion.
- Participants are less likely to interact closely, so discussions don't maintain momentum.
- Excludes people who do not have digital access or skills.

Case studies

What it is:

Case study research is an approach that looks in a lot of detail at a few particular cases. The purpose is to provide very in-depth and contextual information. The 'case' can be at any level the researcher wishes: it can focus on an individual, a unit of people, or a site eg, such institution or geographic area. Generally, case studies should be built through a range of data sources, such as different interviews, input from service users and professionals, and secondary data.

Good for:

- Being used as part of a comparative approach eg, comparing two individual experiences, two service delivery settings, two regions, or two countries.
- Gaining a detailed analysis of a particular setting or process, which is useful for understanding how something works.

Limitations:

- The quality of case studies depends on careful sampling. As only a few examples are chosen, they need to be selected systematically to avoid biasing results.

Participatory research

What it is:

Research is participatory when the people being researched are actively involved in designing the research, collecting and/or analysing data, and reviewing or critiquing findings. For example, participatory methods have been used in international development projects to give local people a say in how projects are run, and to use local knowledge to better tailor the project and its measurement to specific contexts. For more information, see Better Evaluation[13] and Participatory Methods[14].

This is also known as peer research, where individuals with similar characteristics, such as service users, interview people in place of a 'professional' researcher.

[13] http://betterevaluation.org/

[14] http://www.participatorymethods.org/.

Good for:

- Use at any stage in a programme: to explore service user needs to inform programme design, help refine a programme, or collect qualitative evidence of impact.
- Providing richer data than conventional interview techniques. They are more authentic and equalising, with interviewers and interviewees both sharing their experiences, rather than an interviewer extracting information from a participant.
- Developing more of a rapport between the participant and the interviewer. This means the interviewer can probe more deeply while avoiding the feeling of interrogation.
- Offering multiple, creative data sources—participants may gather data using methods like photography or video. Other participatory methods include creating diaries or 'route-maps' with users, in which contributors plot events on a timeline. These methods can help to highlight the link between certain life events and levels of engagement with a project, giving a sense of external influences.

Limitations:

- Resource intensive.
- Lacks any method of comparing impacts on different individuals (unless a broad sample is drawn).
- Less control for those leading the research.

Observation (ethnography)

What it is:

Ethnography is an anthropological research method that aims to understand the social world or culture of a particular group of people, typically by immersing oneself in the community and observing people's practices and behaviour. This immersion is known as 'participant observation'. It is used to gain an understanding of the subject's experiences, beliefs, and opinions.

Good for:

- Starting off programme design, as it is 'user-centred'.
- Understanding the point of view of beneficiaries, or those being studied.
- Exploring a little-known setting or group of people, because it is unstructured—the researcher uses informal discussion, asking questions to understand the situation better.
- Applications in situations like drop-in services, where researchers can study how people are engaging with staff.

Limitations:

- Resource-intensive—it takes a lot of time and the data is 'unwieldy', comprised of notes and other documents that need ordering to make use of.
- Easier for an 'outsider' to take the observer role, as they can integrate themselves from scratch without preconceptions.

Mobile ethnography (mobile self-ethnography)

What it is:

The ubiquity of smartphones and people's intimate connection to them has created new opportunities for gathering data and engaging with participants. Mobile ethnography takes the idea of 'observation' of a participant, but asks the participant to document their own lives—to share stories or answer questions about their life, as they

live it—through their mobile phone. They can turn their 'lens' inward to themselves, to talk; and outward to the world around them, sharing what they see or experience. In this sense, it is more akin to a participant diary—an approach with a long history in social science research. It is very different to naturalistic observation, because the participant is self-aware.

Good for:

- Use as part of needs analysis, to understand beneficiary needs, characteristics—and where there are gaps that a service could address.
- Use part of programme evaluation, illustrating a beneficiary's service experience eg, 'user journey experience' or managing a health condition and using remote health services.
- Gaining an 'insider view' of a person's life without invading their privacy.
- Giving participants control: they choose what they show and what they share, in any format—photos, video, messages or audio.
- Very simple research approaches—the participants are set up with the technology to generate and record the data themselves, before sending it back in a form that is ready for the researcher to analyse. There are an increasing number of apps on the market to support this type of research.
- Being undertaken as a 'third party informant'—so a family member or friend of the research subject 'reports' on their experience. This can be helpful when the individual has a vulnerability, or fewer cognitive powers.

Limitations:

- A very selective, partial perspective on a person's experience because they choose how to represent themselves.
- Unwieldy and challenging to conduct at scale ie, with many beneficiaries. Therefore, best for insight into a limited range of people's experiences.

Documents and other sources

What it is:

Any written, audio or visual materials that already exist. This could include documents relating to the charity's activities, like case management data or previous research that has been conducted. It also includes digital materials. Analysis of these documents is best done in conjunction with interview or collecting group primary research data. It is one way of 'triangulating' different data sources to increase understanding.

Good for:

- Avoiding unnecessary primary data collection. The qualitative information you need might be found in existing documents. For example you may have some qualitative data from key workers' case notes or management systems. Similarly, media articles about a particular topic can be useful, or you may want to analyse local strategy documents to show variation in attitudes or services.
- Supplementing primary (conversation) data, to help explain results.
- Providing background information to help inform primary research questions.

Limitations:

- It may be as time-consuming as primary research because although this data is already available, collecting and analysing it systematically is still important.

APPENDIX 2: READING AND RESOURCES

Qualitative research training providers

A number of organisations offer training in qualitative interviewing, design and analysis.

The Social Research Association (SRA) is a non-profit members association providing training in qualitative research design, interviewing, analysis, reporting at basic and advanced levels:

The Market Research Society also offers a variety of training events and modules aimed at commercial research applications.

The Association for Qualitative Research in the UK offers training courses from a market research perspective.

Guidance on conducting qualitative research

EthnographyMatters.net provides many examples of quality ethnographic studies, as well as discussion points and resources.

Natcen have produced a presentation providing an overview of content analysis, and discussing in which instances more structured analysis is more important in qualitative research:

Evaluation Support Scotland have an introductory guide to using qualitative information in evaluation, on the Inspiring Impact Hub.

Homeless Link provides guidance for charities working in that sector to conduct qualitative research (among other methods), though their suggestions have wider applications for other sectors too.

The following practical guides were produced by NPC on behalf of Clinks for the Improving your evidence project to help justice charities improve their data collection. They are relevant for other voluntary sector organisations too:

- A guide to conducting qualitative research for assessing impact.
- A guide to achieving user participation in evaluation.
- A guide to achieving staff/volunteer commitment and participation in evaluation.
- A guide to using software to help with evidence and data collection.

Transcription agencies

Transcription agencies such as Take note and White Transcription Service take your audio recordings and transcribe them as verbatim text or notes. This is relatively inexpensive and well worth the investment if you have a lot of data.

TRANSFORMING THE CHARITY SECTOR

NPC is a charity think tank and consultancy which occupies a unique position at the nexus between charities and funders, helping them achieve the greatest impact. We are driven by the values and mission of the charity sector, to which we bring the rigour, clarity and analysis needed to better achieve the outcomes we all seek. We also share the motivations and passion of funders, to which we bring our expertise, experience and track record of success.

Increasing the impact of charities: NPC exists to make charities and social enterprises more successful in achieving their missions. Through rigorous analysis, practical advice and innovative thinking, we make charities' money and energy go further, and help them to achieve the greatest impact.

Increasing the impact of funders: NPC's role is to make funders more successful too. We share the passion funders have for helping charities and changing people's lives. We understand their motivations and their objectives, and we know that giving is more rewarding if it achieves the greatest impact it can.

Strengthening the partnership between charities and funders: NPC's mission is also to bring the two sides of the funding equation together, improving understanding and enhancing their combined impact. We can help funders and those they fund to connect and transform the way they work together to achieve their vision.

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