



# Introduction to Qualitative Methods

Summer Institute in Program Evaluation, 2026

Presented by: Marianne Krawchuk & Ibiyemi Arowolo

# Learning Objectives

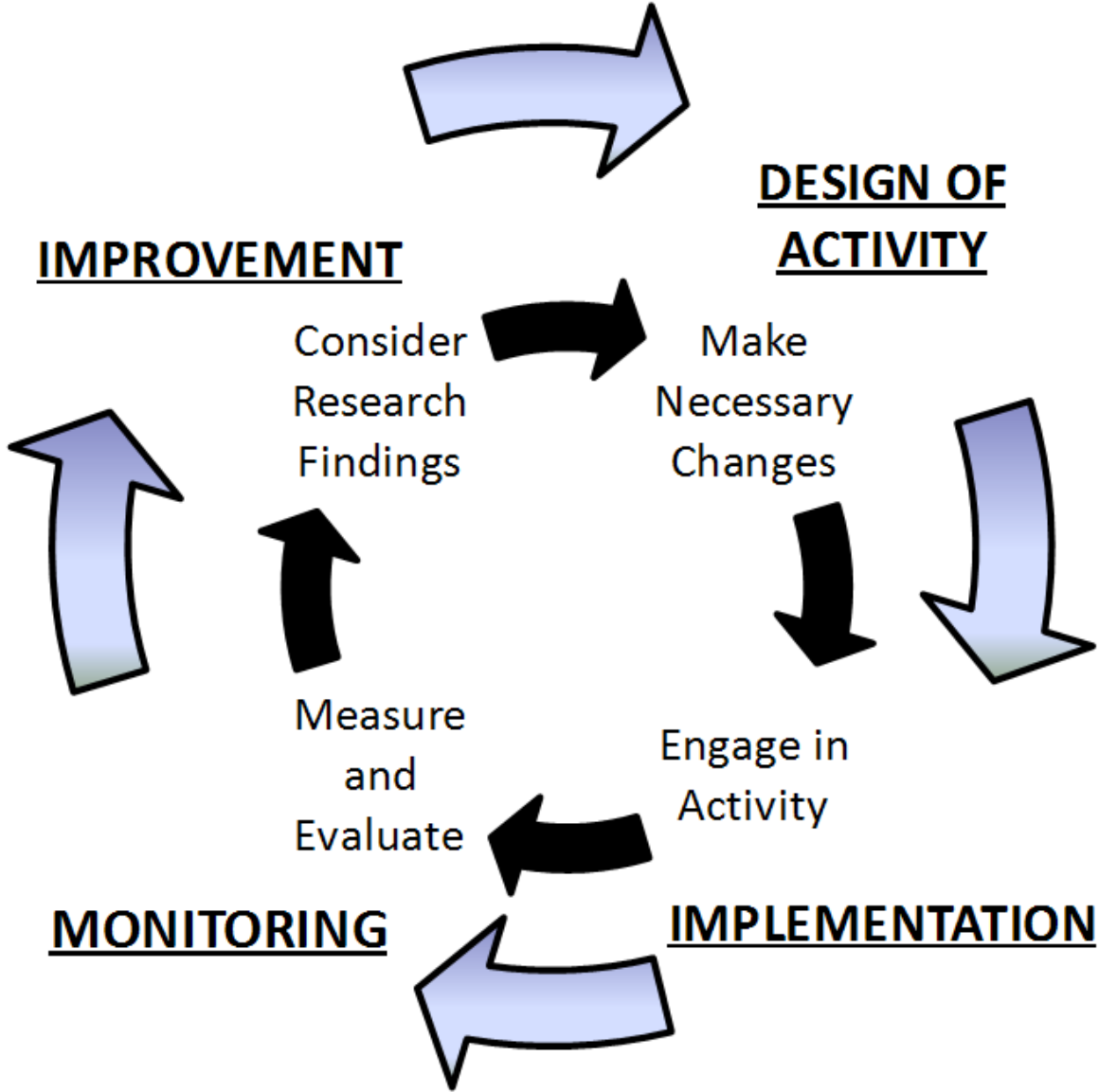
At the end of this session, participants will:

- Have learned about a variety of qualitative methods
- Understand when qualitative methods are (and aren't) used
- Have an overview of strategies used to analyze qualitative data

# Program Evaluation

“Program evaluation is the systematic collection of information about the activities, characteristics, and outcomes of programs to make judgments about the program, improve program effectiveness, and/or inform decisions about future programming.” (Patton)

# Cycle of Evaluation



# Tool Design

*There are no rigid rules for making methods decisions.*

Therefore:

- There is no single best plan for an evaluation
- There is no perfect design
- There are always errors and ambiguities

**\*\*RESOURCE:**

<https://www.tbs-sct.canada.ca/cee/pubs/meth/pem-mep-eng.pdf>



# Things to consider...

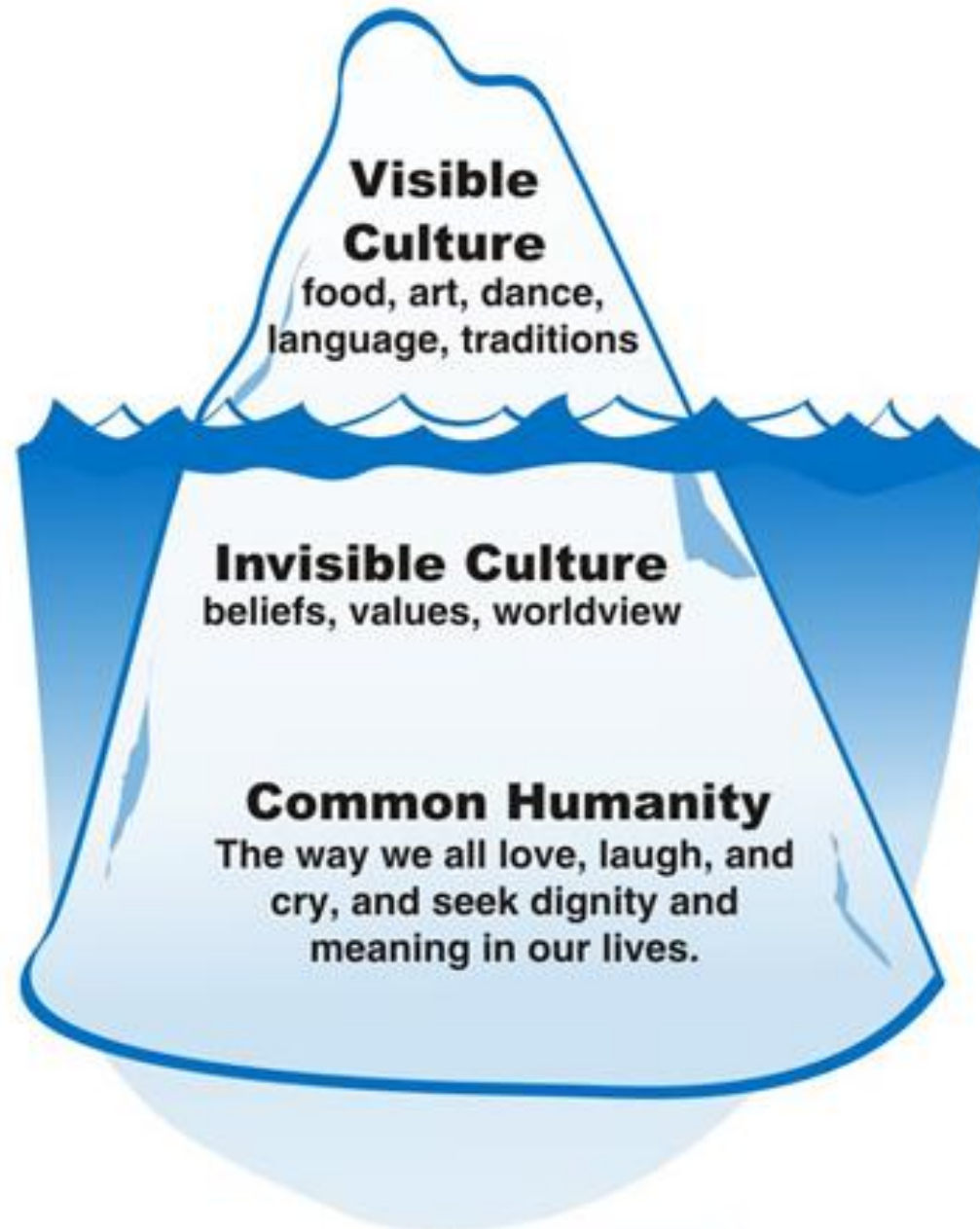
- The purpose of your evaluation
- The respondents
- How information will be used/reported

# Also consider...

- Resources available
- Type of information needed
- Least intrusive method
- Advantages and disadvantages of each method
- Need for credible and authentic evidence
- Multiple methods
- Importance of cultural appropriateness

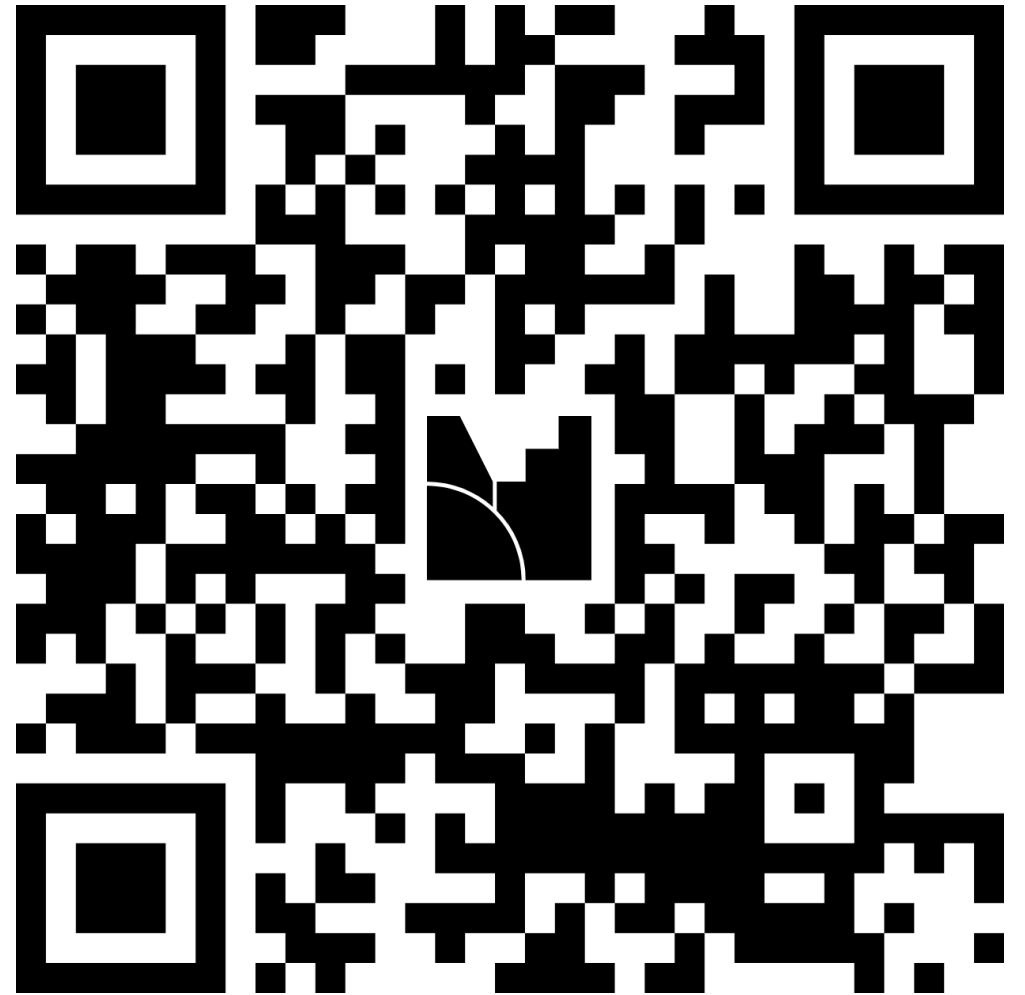
## The connecting cultures iceberg

(Adapted from L. Robert Kohls' "Cultural Iceberg")



# What comes to mind when you think of QUALITATIVE DATA?

Go to [www.menti.com](https://www.menti.com)  
Code: 9822 7366



# Qualitative Data

- Sometimes known as content analysis or thematic analysis
- Identifies themes/patterns in data
- Themes are coded and categorized to better understand the outcome being evaluated
- Words, text, narrative
- Primarily exploratory research
- Often used to learn more about reasons, opinions, and motivations
- Provides more in-depth insights in response to the evaluation question

	<b>Quantitative</b>	<b>Qualitative</b>
<b>Advantages</b>	<ul style="list-style-type: none"><li>• Answers 'how much/may'</li><li>• Provides numerical statistics which may be easier to present/understand</li><li>• More questions answered</li><li>• Little interpretation is needed (therefore less subjective)</li></ul>	<ul style="list-style-type: none"><li>• Can ask for clarifications, 'why'</li><li>• Non-verbal cues</li><li>• Allows flexibility</li><li>• Provides more detailed responses</li></ul>
<b>Challenges</b>	<ul style="list-style-type: none"><li>• Need to understand how to analyze/interpret</li><li>• Doesn't allow for expansion/clarification</li></ul>	<ul style="list-style-type: none"><li>• Resource heavy</li><li>• Small number of responses</li><li>• Facilitator may influence responses</li><li>• Subjective/bias</li><li>• Time consuming to analyze</li></ul>

What comes to mind when you think of  
QUALITATIVE TOOLS?

Go to [www.menti.com](https://www.menti.com)

Code: 9931 2586



## Qualitative Tools & Methods

- Open ended questions
- Testimonials
- Interviews
- Focus groups
- Conversation Circles
- Sharing Circle
- Content analysis
- Case studies
- Stories
- Observations
- Drawings
- Photo voice
- Path
- Colours/Drawing

# Focus Groups

<b>Purpose</b>	<b>Strengths</b>	<b>Limitations</b>
To explore a topic in depth through group discussion	<ul style="list-style-type: none"><li>• Can identify unanticipated issues</li><li>• Helps explain quantitative findings (can expand/follow up)</li><li>• Opportunity to share opinions</li><li>• Empowers participants</li></ul>	<ul style="list-style-type: none"><li>• Responses need to be analyzed</li><li>• Requires a good facilitator</li><li>• Can be difficult to get group together/participation</li><li>• Group perspective may distort individual views</li><li>• Can be time/labour intensive to organize</li></ul>

# Focus groups – *before the session*

- Define objectives (determine purpose)
- Choose (train) a moderator
- Prepare 4-6 questions and test them; develop a discussion guide
- Recruit participants (usually 8-12, offer incentive)
- Prepare consent forms
- Find appropriate space (consider location, comfort)
- Assign a note taker and set up recording device

# Focus groups – *during the session*

- Get consent forms signed
- Explain the purpose
- Explain the session (who will take notes, how information will be recorded)
- Explain 'ground rules'
- Move from general to specific topics
- Be creative – small exercises will help maintain interest and engagement
- Ensure all participants are included in discussion

# Focus groups – *after the session*

- Thank your participants (either send a card, email, thank them in a newsletter etc...)
- Transcribe data
- Summarize data
- Analyze data (be careful not to generalize too easily)
- Prepare a report and share your findings

# Interviews

<b>Purpose</b>	<b>Strengths</b>	<b>Limitations</b>
To provide a fuller understanding of someone's impressions or experiences and to learn more about responses to questions.	<ul style="list-style-type: none"><li>• Permits clarification and elaboration of responses</li><li>• Process builds trust therefore 'better' data</li><li>• Process does not require a high level of literacy or technology</li><li>• Greater completion rate than paper surveys</li></ul>	<ul style="list-style-type: none"><li>• Time consuming</li><li>• Difficult to analyze and compare</li><li>• Can be costly, resource intensive</li><li>• Requires skilled Interviewers – relationship may influence responses</li></ul>

# Case Studies, Testimonials & Story-Telling

<b>Purpose</b>	<b>Strengths</b>	<b>Limitations</b>
To provide a comprehensive examination of a participant's experiences.	<ul style="list-style-type: none"><li>• Provides “rich” information on specific cases</li><li>• Can answer cause and effect questions</li><li>• Participant determines what is important</li><li>• Gather information on the full story, not just pieces</li></ul>	<ul style="list-style-type: none"><li>• Time consuming to collect, organize, and describe</li><li>• Reflects only one individual's experience</li></ul>

# Photo Voice

<b>Purpose</b>	<b>Strengths</b>	<b>Limitations</b>
To provide a fuller understanding of someone's impressions or experiences by examining their view	<ul style="list-style-type: none"><li>• Provides "rich" information on specific cases</li><li>• Can answer cause and effect questions</li><li>• Involves participants</li><li>• Less dependent on language and/or high level of literacy</li></ul>	<ul style="list-style-type: none"><li>• Potentially time and resource consuming</li><li>• Difficult to analyze and compare</li><li>• Subjective; based on participants' experiences/views</li></ul>

# Analysis

1. Get to know your data:
  - transcribe and organize
  - read and re-read
2. Focus the analysis
3. Categorize the information (preset & emergent categories)
4. Identify patterns and connections within and between categories
5. Interpret data & verify with participants if possible
6. Report data

<http://learningstore.uwex.edu/assets/pdfs/g3658-12.pdf>



# Analysis

3-13-02 Evaluation Workshop, Madison

**Q 5. What do you need next to continue your learning about evaluation?**

- |             |   |   |
|-------------|---|---|
| <i>Trg</i>  | 1 | More advanced data analysis   |
| <i>T, R</i> | 2 | More time/information on all the same concept   |
| <i>P</i>    | 3 | Just start doing them   |
| <i>Trg</i>  | 4 | Another workshop  |
| <i>Fdbk</i> | 5 | Assessment feedback on how beneficial (or how well I did) the evaluation of my project was for USDA |
| <i>Trg</i>  | 6 | How to measure long range planning outcomes   |
|             | 7 | Yes   |
| <i>P</i>    | 8 | Do it!  |
| <i>Trg</i>  | 9 | Need additional training and review   |

Line 7 is left uncoded because "Yes" is not usable data.

# Coding

- A systematic way of processing qualitative data
- Refers to the development of concepts and categories in the recognition and ordering of themes
- Not a linear process
- Open vs. focused coding (preset vs emergent)

# Categories - *Preset vs Emergent*

- Pros & Cons
- May need to do both (ie. start with preset & consider additional categories)
- Some categories may have subcategories
- Categories should be mutually exclusive and exhaustive

# Coding Elements

- A label
- A definition of what the theme relates to
- A description of how to know when the theme occurs (how to flag it)
- A description of any qualifications or exclusions to the identification of the theme
- Examples, both positive and negative, to eliminate possible confusion when looking for the theme

# Be Aware of Unanticipated Outcomes



# Interpreting Data - *before*

- Include representatives from various constituent groups
- Have all the results organized ahead of time
- Use tables and graphs to present your data, as appropriate
- Have information on the purpose and process of the original data collection

# Interpreting Data - *during*

- Remind people of the purpose/process
- Identify any limitations
- Describe the data as it has been analyzed, then interpret data
- Be clear about the differences between descriptive analysis and interpretation
- Be cautious about moving to the judgment ('evaluation') stage.
- Look for themes or trends in the data
- Be open to multiple interpretations (inter-rater reliability)

# Interpreting Data - *after*

- Identify areas for follow-up: is there something more you need to know?
- To whom should the data and its interpretation be presented?
- Determine how the data and its interpretation should be presented to various audiences.
- Ensure that you have the documentation of all stages of the process for future reference.

# Presenting the Data

- For questionnaire data, organize by question
- Indicate how many respondents answered the question and how many were coded
- Discuss the themes, starting with most prominent or significant
- Provide examples of responses that illustrate the theme

# Photo Voice

[Contextual factors of financial capability and financial well-being for adults living with brain injury: a qualitative photovoice study \(tandfonline.com\)](https://tandfonline.com)

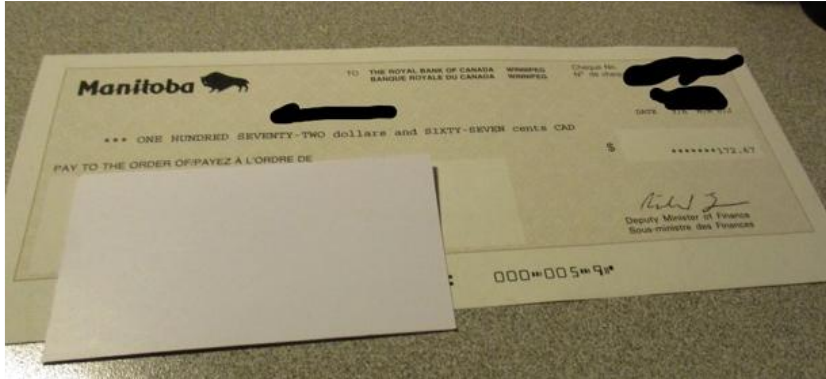
## Objective

To identify the contextual factors related to financial capability and financial well-being for adults living with acquired brain injury (ABI).

## Design & Method

We conducted a qualitative descriptive study using photovoice and included 17 adults who live with ABI in Manitoba, Canada. Over 3-to-5 weeks, participants took photos of their financial capability (i.e. knowledge, skills, and behaviors related to managing finances) or their financial well-being (i.e. subjective and objective financial outcomes). **Participants were interviewed about their photos.** Five researchers iteratively and thematically analyzed interview transcripts.





FILE MYSELF ??  
 → COST \$20 ↑  
 → LEARN ONLINE SOFTWARE  
 ? . ? . ?



6:16

Receipt Description \*

Your answer

Receipt Amount \*

Your answer

Submit

## Perceptions of barriers, facilitators and motivators related to use of prenatal care: A qualitative descriptive study of inner-city women in Winnipeg, Canada

- Individual, semi-structured interviews were conducted in person with 26 pregnant or postpartum women living in inner-city neighborhoods with high rates of inadequate prenatal care

Table 2.

Barriers, facilitators, motivators, and suggestions to improve PNC: perceptions of inner-city women in Winnipeg, Manitoba, Canada<sup>a</sup>.

Categories	Themes and subthemes
Barriers	<p><i>Personal barriers</i></p> <ul style="list-style-type: none"><li>• Logistical issues related to transportation and child care (20)</li><li>• Limited awareness of PNC services (19)</li><li>• Lack of social support (17)</li><li>• Financial issues (13)</li><li>• No perceived need or value in attending PNC (11)</li><li>• Lack of motivation (10)</li><li>• Other commitments (10)</li></ul> <p><i>Care provider qualities</i></p> <ul style="list-style-type: none"><li>• Not meeting expectations (16)</li><li>• Negative personality characteristics (13)</li><li>• Too busy (12)</li><li>• Not sharing information (11)</li></ul> <p><i>Program and service characteristics: inaccessible and inconvenient</i></p> <ul style="list-style-type: none"><li>• Lengthy office wait (13)</li><li>• Scheduling difficulties (11)</li><li>• Geographic distance: “too far away” (10)</li></ul> <p><i>Healthcare system characteristics</i></p> <ul style="list-style-type: none"><li>• Shortage of PNC providers (10)</li></ul>

*I was supposed to go for an ultrasound but I couldn't go. It was cold that day and I wasn't gonna walk. I didn't have no bus fare ... didn't want to freeze my ears, so I just stayed home. (G10 P4, 23 years)*

*For me, because of the fact that I have other kids, finding buses that are easy access to get a stroller onto [is a problem] ... And trying to plan what it is that we are going to do in the doctor's office when we are waiting for an hour and a half with my kids. (G4P3, 27 years)*

# Perceptions of barriers, facilitators and motivators related to use of prenatal care: A qualitative descriptive study of inner-city women in Winnipeg, Canada

- While our findings are largely consistent with those of similar qualitative studies on barriers and motivators related to use of PNC, [10](#), [11](#), [17](#) **this study presents the unique perspectives of inner-city women living in a Canadian city with a high proportion of Aboriginal people.** An additional contribution of this study is our focus on understanding factors that make it easier for women to seek PNC. Often through deeply felt experiences, participants were able to articulate a number of positive characteristics of programs and care providers, as well as types of social support that facilitated access to PNC.
- By recognizing the areas of overlap between the barriers, facilitators, and motivators identified, a number of practice implications arise.

# Winnipeg Boldness Project

The Winnipeg Boldness Project has employed a comprehensive strategy of community engagement through diverse arts based methods . These methods have allowed community to share in the design of the project while also sharing their own experiences raising their families in the North End of Winnipeg .

These arts-based methods have included a Photo Voice Project and a Tile Mosaic Project.

# Winnipeg Boldness Project



<http://www.winnipegboldness.ca/wp-content/uploads/2018/11/Two-Year-Report-Long.pdf>

# Photo Voice: 2013 State of the Inner City Report

<https://www.youtube.com/watch?v=n6uu0y93LAW>

# Pitfalls to Avoid

- Avoid generalizing
- Choose quotes carefully
- Address limitations and alternatives



# Things to remember...

- There is no one right method of collecting data.
- Choose a method that makes sense for your participants, setting, resources and evaluation goals.
- The goal is to obtain trustworthy, authentic and credible evidence in a good way.
- Use evaluation as an opportunity for continuous learning & quality improvement.
- Always ensure that evaluation results are utilized in the intended way!



# Questions & 'Aha' Moments

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# Resources

## Evaluation

- Canadian Evaluation Society, <http://www.evaluationcanada.ca>



- Canadian Evaluation Society, Manitoba Chapter, <https://cesmb.ca/>



## Data Collection

- Analyzing Qualitative Data - University of Wisconsin Extension, <http://learningstore.uwex.edu/assets/pdfs/G3658-12.PDF>



*Thank you for your time!*

## **Contact Information**

Marianne Krawchuk

United Way Winnipeg

(204) 924-4227

[mkrawchuk@unitedwaywinnipeg.ca](mailto:mkrawchuk@unitedwaywinnipeg.ca)

Ibiyemi Arowolo

University of Manitoba

(204) 474-6048

[Ibiyemi.Arowolo@umanitoba.ca](mailto:Ibiyemi.Arowolo@umanitoba.ca)

