Appendices

APPENDIX VII: Technical Guidelines

Staff and Collaborating Partner Surveys: Analysis Guidelines

The following are rough guidelines on exporting, cleaning and preparing the data for analysis. *SurveyMonkey* provides very basic analysis. It is recommended that once you have completed the survey administration, you should export the data into software such as SPSS or Excel. Following are tips for managing and conducting basic analysis of your data. For more detailed analysis and reporting, we recommend hiring a consultant if you do not have staff with that expertise.

Quantitative Data

Data Management

- ☐ Ensure that all variables are named and labeled correctly.
- ☐ Add and recode value labels for all numeric variables:
  - All scales should be labeled in the correct order. In a five-point scale, the lowest level value should equal 1 and the highest level value should equal 5. For example, in a satisfaction five-point scale, "Not at all satisfied" should equal 1 and "Very satisfied" should equal 5. (Note that the Partner Survey scale is opposite, with 1 equaling "Strongly Agree.")
  - All questions with an option to check all that apply will export each response option in separate variables. When exported, value labels will appear only for response options selected by the respondent.

    Example:

    If a respondent selected response option 1 and 2, but did not select response option 3 then that case will show a 1 for the first variable, a 2 for the second variable, and nothing for the third variable.

    Recode all variables so anything that was selected/checked equals 1 and anything that was not selected equals 0 (i.e. "Checked"=1 and "Not Checked"=0) as shown in the table below.

    Once you have recoded all variables for that question, check for system missing data. If a respondent did not select any of options in that question, then all of those variables should be recoded as system missing (i.e. 99=missing value). Make sure to declare your missing values so that the value you assign then (i.e., 99) won't be included in analyses.

Before Cleaning Data

Cases	Var 1	Var 2	Var 3
Staff 1	1	2	
Staff 2		2	3
Staff 3	1		
Staff 4			

After Cleaning Data

Cases	Var 1	Var 2	Var 3
Staff 1	1	1	0
Staff 2	0	1	1
Staff 3	1	0	0
Staff 4	99	99	99

  - All questions with Yes/No options should be labeled consistently. Recode values so "Yes" always equals one (1) and "No" always equals zero (0).
  - Check all questions that include an "I don't know" or "Not Applicable" option. Run preliminary frequencies and determine if you'd like to include that option in your analysis. If not, recode all "I don't know" values as system missing (i.e. 88=I don't know, 77 = Not Applicable). Make sure to declare your missing values. You may want to include "I don't know" and "Not Applicable" in the initial frequencies of all variables, and then declare these responses as missing when calculating means and other statistics.
  - For questions that include an "Other" category, see if the response given in the string variable can be included in one of the existing numeric categories. If so, recode appropriately.

- [ ] After data management, run frequencies on all variables and see if you notice any inconsistencies or additional cleaning that needs to happen before analysis. Check for:
    - Unexpected or counter-intuitive findings, such as consistently low ratings in an area where the agency has done a lot of work (the scale may have exported incorrectly).
    - Very high proportion of missing data (responses may have exported or coded wrong).
    - These responses may be real, but skimming your data for these red flags first can help catch coding errors.

Data Analysis

- [ ] Run frequencies for all variables. We suggest analyzing the data specific to each domain of the Matrix separately to make it easier to translate the output into tables that group similar data.
- [ ] Run cross tabs for selected variables. The Leadership and/or Implementation Teams should discuss what data groupings would contribute to the understanding of staff responses. For example, breaking out staff responses to certain questions by race/ethnicity, staff position, length of time at the agency, or whether they work directly with the community may provide important context to overall findings.
- [ ] If desired, run statistical tests, such as t-tests and ANOVAs for means differences and chi-square tests for differences in proportions, to test whether differences observed in the cross tabs are statistically significant.

Qualitative Data

Data Management

- [ ] Make sure all string (text) variables are exported. If you notice string variables where there are no responses from any of the respondents, check the original data to see if any responses that are actually given are missing in the exported file. Skimming the original data for this red flag first can catch any exporting errors.
- [ ] If a response is greater than 255 characters, it may get cut off when exported into SPSS. If a response appears incomplete, check the original data.

Data Analysis

- [ ] Organize all open-ended responses into recurring themes to make it easier to interpret.

    Throughout the survey, ratings matrices are often followed by an open-ended question asking survey participants to explain their ratings. It may be helpful to run the frequencies of the string variables individually by each of the preceding questions, so that its corresponding rating can contextualize each comment. In SPSS, an alternative for analyzing open-ended responses in the context of other responses given by the same staff member is to use the "List" function to display selected responses side by side for each respondent.

Staff Focus Groups and Management Interviews: Analysis Guidelines

Qualitative Data

The tips below provide suggestions for making use of the qualitative data generated by the focus groups and interviews with management staff.

Data Analysis

- ☐ Use the Matrix of Workforce Competencies and Organizational Characteristics for Addressing Health Inequities as an organizing framework for the analysis. Because the focus group and interview protocols are designed to elicit responses about personal and organizational characteristics on the Matrix, it may be helpful to start with the list of Matrix domains at the beginning of this section and assign these domains as themes under which to organize the responses found in the focus group and interview data.
- ☐ Of course, additional themes may emerge from the focus groups and interviews that do not easily fit into the Matrix domains; don't force a quote or theme where it doesn't comfortably fit. These themes that arise organically from one or more focus groups or interviews can hold important insights about the organization and its staff, and should be given equal consideration.
- ☐ For the data for the focus groups and separately for the interviews, it may be helpful to make the transcribed text of each session a different color. Then, for the focus group data and separately the interview data, you can cut and paste the responses from each session into a single document organized by Matrix domain and other categories as needed, allowing an at-a-glance view of whether a theme was repeated by several respondents, or if a respondent had a distinct take on an issue, or if the same respondent raised the same issue repeatedly.
- ☐ After all focus group and/or interview data have been grouped into categories, do a thorough re-read of all data to see if other ways of organizing the data come to light. For instance, something that was assigned to a domain early on may later seem to fit better in a different category, based on other responses that were categorized later.
- ☐ Once all focus group and/or interview data are organized, flesh out the themes of the responses relating to each Matrix domain and pull out illustrative quotes that directly represent the voice, tone and meaning of the group's and/or interviewees' responses on that theme.
- ☐ The final step in making use of these rich qualitative data is to refer back to the Staff Survey findings and use these data to help support, contextualize, explain or give an alternate perspective on those findings.
- ☐ The Leadership and Implementation Teams should discuss the added information about staff and organizational capacity provided by the focus groups and/or interviews. See Section V for recommendations for reflecting on the Toolkit data and translating the information into action for your LHD.