Discovery Research and Qualitative Analysis

Analyzing 20+ hours of semi-structured interviews

Timeline:
1.5 months, 3 sprints (Spring, 2023)

My Team:
Devin Harvath, Senior UX Research Manager
Thomas Carlock, UX Research Intern

Impact:
Provided the organization with an understanding of how our users engage with demographics data and the role it plays in philanthropy across nonprofit development and funder program strategies. Also outlined prioritized solutions.

The ~~problem~~ situation: learn about nonprofit demographic data experiences

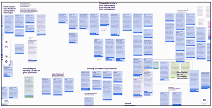
Individual funders often request demographic makeup information directly from their nonprofit partners. This places a burden on nonprofits that respond to multiple, often varied demographic data requests in their fund-seeking process. As a leader in philanthropic data, Candid saw an opportunity to establish a standardized measurement so that nonprofits can share their data one time. This initiative was called Demographics via Candid. Our research team was asked to gain an understanding of how nonprofit staff experience managing their organization's profile on our product (GuideStar), and their perceptions of collecting and sharing demographic information about their organization's leadership and staff.

My Approach

- Establish familiarity and understanding
- Identify research questions and/or goals
- Select method(s)
- Conduct the research
- Analyze data
- Identify insights
- Present and share with relevant stakeholders

Constraints

- I was brought onto this project after the interviews had already been conducted. As such, I was limited to only being part of the analysis, and could not collect new data.
- We had two other projects running concurrently to this one, and my work hours were split between them. This made the 3 sprint timeline feel significantly tighter.



One of the methods we used to identify themes in our qualitative data, similar to affinity mapping. This is only a small portion of the entire board.

Establishing familiarity and understanding, identifying research questions and goals, selecting method(s), and conducting research.

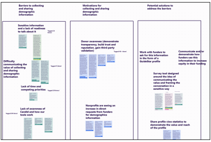
I was brought onto this project in a later stage. Research questions and goals had been established, interviews had already been conducted, and there was over 20 hours of recordings that were yet to be coded. As such, the most important part of my approach that applies here was to gain familiarity with and an understanding of the context around this research project so I could begin qualitative analysis. I was still relatively new to my organization, and spent a significant amount of time learning about our products and our users, including reviewing personas and journey maps. Early on I also took a few hours to watch some of the interviews conducted for this project, without yet worrying about coding or identifying themes.

Analyzing data and identifying insights.

It was my responsibility to identify the ideal methods for qualitative analysis. I decided to go with a combination of thematic analysis and affinity mapping, two methods I was familiar thanks to my two years as a research assistant in the UXP2 lab under Dr. Colin Gray. I chose these methods because listening and coding would be good preparation for a collaborative affinity mapping process. I suggested we begin by establishing inter-coder reliability, knowing the importance this holds in academic research. I also viewed it as a way to ensure I was on the same page as my manager, who was more familiar with Candid's products and the overall objectives of our project. Of the 15 total interviews, we were to each code two at first. After tagging and identifying related quotes and recurring insights, we would come together to identify a codebook that combined and aligned our perspectives. Afterwards, we would assign the remaining interviews to be coded.

Having coded all of the interviews on Dovetail, we created an empty canvas that would automatically pull all of the tagged quotes. I began the extensive process of grouping together tags and quotes to identify themes, as shown in the image above. I gave the board the first run through, and then we met multiple times to work simultaneously, reviewing and refining themes as we learned more about our data.

Throughout this process, we continuously reiterated on our themes as we reflected on the best ways to share our results. **Our initial over-arching categories of insights were: 'barriers to collecting and sharing demographic information', and 'motivations for collecting and sharing demographic information'. Over time, we came to realize that some barriers aligned with some motivations, and we could use our findings to ideate on solutions that would simultaneously capitalize on motivations while addressing the corresponding barriers.**

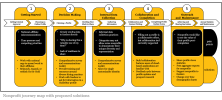


We used the groupings from our affinity mapping process to create a table. Columns were barriers, motivations, and solutions. Rows would end up becoming themes for our future presentation.

I'd like to share one specific example to make sure the process is clear. We learned that nonprofits don't want to be labeled as not representative of the community that they serve. This is a clear barrier to them collecting and sharing demographic information. On the other hand, we also learned that a motivation for collecting and sharing demographic information is that nonprofits know foundations care about whether or not organization's leadership is representative of the community that they serve. Some solutions for this include: providing support, guidance, and training around diverse hiring practices, and adding change-over-time charts that would visualize demographic data in a way that nonprofits can display changes in the makeup of staff and leadership that align with their goals for diversity. We grouped together these insights under one theme: 'Addressing fears'. We ended up identifying 7 themes in total.

Presenting research outcomes to relevant stakeholders

We decided that the best method of presenting our findings would be via a slide deck. After an introduction and a brief explanation of our methodology, we explained the structure of our themes and began to go through each one; covering motivations, barriers, and solutions for each theme. I included quotes and interview clips to keep the audience engaged in the presentation. At the request of my manager, I developed a user journey that highlighted pain points we identified and their proposed solutions. I also created a table that laid out solutions, the product team it corresponded to, and a priority of either high, medium, or low. My manager and I gave our final presentation together at a monthly organization-wide 'town hall' meeting.



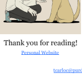
Nonprofit journey map with proposed solutions

Solution	Priority	Team(s)
Comprehensive survey and communications toolkit or application	HIGH	Product Management, Learning, Design, Technology
Work with funders to ask for this information in the form of a GuideStar profile	HIGH	Already in process
Work with national organizations to spread the word to their affiliates	HIGH	Partnerships (already in process)
Relaunch, expand, or rethink Go for Gold	HIGH	Product Management, Partnerships, Growth
Granular demographics search filters	MED	Product Management, Partnerships, Design
Suggest nonprofits to funders based on demographics	MED	Data Science, Product Marketing
Free aggregate reports for nonprofits	MED	Product Management, Data, Insights
Provide training (or referrals to resources) around diverse hiring practices	MED	Partnerships, Learning, Product Management
Allow for a single customizable demographic identity to be added to profiles	MED	Data, Partnerships, Product Management, Design
Create a feedback cycle between profile updates and prospect research	MED	Product Management, Design
Build collaboration features familiar to users of cloud-based applications	MED	Product Management, Design
Share profile view statistics	LOW	Product Management, Design, UXR
Side-by-side presentation of demographics and pop-served	LOW	Product Management, Design, Partnerships
Change-over-time demographics charts	LOW	Product Management, Design

Table of proposed solutions with corresponding teams and priority level

Takeaways and reflection:

- This project taught me about the importance of actionable research. During both the qualitative analysis and the creation of the presentation, we constantly were considerate of how teams in our organization could take our findings and make effective improvements to our product. This clicked for me when my manager stressed the importance of including recommendations in the form of the prioritization table.
- I learned that qualitative analysis can be pretty messy. It isn't convenient, and themes don't just show up out of nowhere, it takes significant time and effort to uncover good insights from qualitative data. We learn about iterative design, but in a way during this project I felt as if I was constantly iterating on my research findings. I would group some tags together just to un-group them during my next work session because I found a better fit somewhere else. It was fun.
- This was my first time creating a user journey outside of any academic assignments. While it was not terrible and worked for the purpose of this project, I have since refined my strategy and created a new template for user journeys that I have utilized a few times on a newer project where I am improving our collection of personas.



Thank you for reading!

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