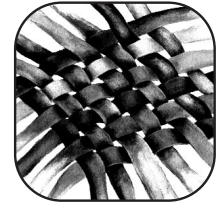# Module 7: Information Gathering, Part 3: Compiling Results

Step One: Creating Your Inclusiveness Committee

Step Two: Training and Consultants

Step Three: Definitions and Case Statement

Step Four: Gathering and Analyzing Information

Step Five: Creating Your Inclusiveness Blueprint

Step Six: Implementation

MODULE 7: INFORMATION GATHERING, PART 3: COMPILING RESULTS

Overview of Content

In this module, you will be provided with a method for compiling the information you collected in Modules 5 and 6. You will also:

- Decide who will be responsible for compiling the available facts (gathered in *Module 5*) and the stakeholder perspectives (gathered in *Module 6*).
- Compare pertinent community information with field data and organizational data.
- Create spreadsheets, to tabulate available facts and stakeholder perspectives, that will be used as you create the inclusiveness blueprint.

Note that this module is specifically about compiling information as compared to *analyzing information*. In *Module 8: Creating the Framework for the Blueprint,* you will do a preliminary analysis of the data and determine which categories (e.g., Mission, Personnel, Programs) to prioritize. In *Modules 9-16*, you will do a deeper analysis of the data and develop an action plan to achieve the changes you identify are needed.

Who to Involve

The majority of the work in this module requires the attention of one or two people rather than the entire Inclusiveness Committee. After being selected, that person(s) will complete the exercises and report back to the Inclusiveness Committee with their compilations.

Exercises to Complete

The chair of the Inclusiveness Committee and the executive director complete the following exercise:

- *Exercise 7-A: Identify Who Will Be Responsible for Compiling Data*

The person(s) selected to compile the data review the following content:

- Tips for Compiling the Data on Stakeholder Perspectives
- *Sample 7-D: Sample Survey of Stakeholder Perspectives*
- *Sample 7-E: Sample Stakeholder Perspectives: Likert Scale Responses (Quantitative)*
- *Sample 7-F: Sample Stakeholder Perspectives: Narrative Responses (Qualitative)*
- Tips for Compiling Focus Group Responses

The person(s) selected to compile the data completes the following exercises:

- *Exercise 7-B: Available Facts: Making Numerical Comparisons (Quantitative)*
- *Exercise 7-C: Available Facts: Compiling Other Information (Qualitative)*
- *Exercise 7-G: Stakeholder Perspectives: Compiling Likert Scale Responses (Quantitative)*
- *Exercise 7-H: Stakeholder Perspectives: Compiling Narrative Responses (Qualitative)*
- *Exercise 7-I: Stakeholder Perspectives: Compiling Focus Group Responses (Qualitative)*
- *End-of-Module Checklist*

Then, hold meeting(s) to review the compilations of the data as developed by the data compiler(s).

Step Four: Gathering and Analyzing Information

MODULE 7: INFORMATION GATHERING,
PART 3: COMPILING RESULTS
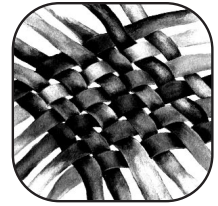
Selecting Someone to Compile the Information

Depending on the depth of your information-gathering process, compiling the information you collected may be simple or more complex.

If you have resources, you may wish to save time by hiring someone to compile the information. If you don't have resources to hire someone, identify someone in your organization who has comfort and ability with basic spreadsheet usage to help with this part of the inclusiveness initiative. Or, you may want to use a volunteer such as a graduate student who is interested in the subject of inclusiveness. In order to split up the workload, you may select one individual to compile the existing data and another to work with stakeholder perceptions.

Spreadsheets are useful for sorting information by position within the organization, by demographic characteristics, or by any other attribute you may have asked of your stakeholders. If you asked *questions* using the Likert see Module 6, pg 55 (numerical rating scale), spreadsheets can make it easy to compute the average score, or mean, of the answers to a given question. While this process doesn't require complex statistical analysis, it does require taking the time to tally up the answers and the ability to do basic math.

Complete *Exercise 7-A: Identify Who Will Be Responsible for Compiling Data.*

Compiling Available Information

Complete *Exercises 7-B: Available Facts: Making Numerical Comparisons (Quantitative) and 7-C: Available Facts: Compiling Other Information (Qualitative).*

Tips for Compiling the Data on Stakeholder Perspectives

The information you gather from stakeholders will be useful only when you put it into a format that allows you to analyze it. Looking at the information as a whole will allow you to see trends for all stakeholder groups and compare perspectives of different groups. For example, you may learn that there are significant discrepancies between the perceptions of stakeholder groups, such as the board of directors and the staff.

Here are some other tips that you may find useful when compiling the information you have gathered:

- Use different spreadsheets for quantitative information and qualitative information.

- Assign a number to each person who responded to a survey or interview and associate all answers from that respondent with their assigned number. Also be sure to record the assigned number on the individual surveys or the interview write-up form so that you can go back to the answers from a particular respondent if you need any clarifying information later.

- For individual respondents, be sure to include personal information on each, such as what group(s) they belong to (e.g., former board member, donor, etc.) and anything else you may have decided to collect on respondents (e.g., their race or ethnicity). Do not include names. Use consistent language for personal information. For example, do not say "donor" for one respondent and "contributor" for another respondent.

- Use the same format or the same questions for surveys and interviews if you collected similar information from different groups, such as volunteers and staff.

Review Exercise 7-D: Sample Survey of Stakeholder Perspectives (This information-gathering tool includes a short selection of questions. For more questions, refer to Module 6, Exercise 6-B: Reviewing Information-Gathering Topics.)

Review Exercises 7-E: Sample Stakeholder Perspectives: Likert Scale Responses (Quantitative) and 7-F: Sample Stakeholder Perspectives: Narrative Responses (Qualitative).

Complete Exercises 7-G: Stakeholder Perspectives: Compiling Likert Scale Responses (Quantitative) and 7-H: Stakeholder Perspectives: Compiling Narrative Responses (Qualitative).

Tips for Compiling Focus Group Responses

If you completed focus groups as part of your data gathering, it is important that you prepare a summary shortly after each focus group has been completed.

In general, there are three basic ways to look at the responses that come from focus groups:

1. Themes: The most important outcome from a focus group is capturing the themes that arise from the group regarding the issues about which you are most concerned. Typically, the moderator will be responsible for capturing the themes and for writing a summary of the pertinent themes after the focus group is over.
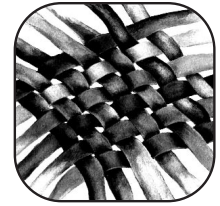
2. Verbatim Responses: A transcript of a focus group can provide you with a clear sense of the tone of the group, the dynamics within the group, and most importantly, the word-for-word responses from participants. Sometimes there are things that individuals might say in a focus group that are of particular relevance but might not get picked up in someone else's interpretation of key themes. Creating transcripts requires audio-taping a focus group, and then having someone type the responses from the audio-tape. This can be costly and time-consuming, so if your budget is limited, this might not be feasible.

3. Insightful Comments/Suggestions: In most focus groups, there are a few very illuminating comments made by participants that aren't necessarily shared by the whole group but that are insightful nonetheless. Sometimes the comments come in the form of constructive criticism, particularly astute analysis or observation, or a recommendation about how an organization's work can be improved. Whoever is responsible for creating a report at the completion of the focus group should pay close attention to these valuable comments and be sure they get recorded.

When summarizing the results from a focus group, break down the responses into categories (e.g., Mission and Organizational Values, Board of Directors, Personnel, Programs, etc.). Keeping data in categories will help you easily review the necessary information when it comes time to create the inclusiveness blueprint.

Complete *Exercise 7-I: Stakeholder Perspectives: Compiling Focus Group Responses.*

Analyzing Information

In *Modules 9-16* you will complete exercises to identify trends and important points from the data within each prioritized category. Here are some of the things you will be looking for as you analyze the data:

- *Overall:* Are there clear themes that came from a majority of your stakeholders regarding the organization's strengths and challenges in regards to inclusiveness?

- *Inconsistencies in Existing Data:* Are there inconsistencies between the community, field, and organizational data? For example, do you find that the community data show that 45 percent of your service area is comprised of people of color, yet your client base is only 25 percent people of color?

- *Inconsistencies in Stakeholder Perspectives:* Are there inconsistencies between stakeholder groups? For example, do you find that your Board of Directors believes that the organization is effectively serving
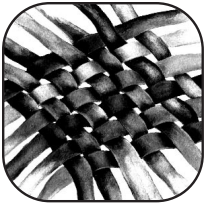
communities of color, but your client base tells you something different? Do you find that people of color and white people affiliated with the organization have widely divergent opinions about the organization's services?

- *Strongly Held Beliefs of Stakeholders:* Are there any stories or strongly held beliefs about the organization that are preventing the organization from moving forward on inclusiveness matters? For example, do some people in your organization believe that the mission of your organization is irrelevant to communities of color?

As is true with any planning process, analyzing the results from your information-gathering work will require some interpretation of the data, especially in regards to the stakeholder perspectives. The Inclusiveness Committee may be overwhelmed by the amount of potentially valuable information it receives. In this case, it is important for the committee to look at two important variables:

- *Information must be interesting **and** important:* Is the information simply interesting, or is it really important to the work that we do? For example, you might find that there is a perception that your organization does not adequately serve rural communities; however, if your catchment area does not include rural communities, then this may not be an important issue to focus on right away. (For more description on determining whether or not information is interesting and important, refer to *Module 5*, the section on *Developing a Scope and Strategy.)*

- *There must be an acceptable threshold for defining themes:* Can you establish a threshold for the minimum number of people who need to share a perspective for an issue to be deemed a relevant "theme"? For example, is it important if only two stakeholders articulate a particular problem, if those two people represent ten percent of the people who were interviewed? Your Inclusiveness Committee should discuss this issue ahead of time and get a general sense of a threshold that is acceptable to most members of the committee.

Track your progress in completing Module 7 on the *End-of-Module Checklist,* located after the exercises.

Module 7: Information Gathering Part 3, Compiling Results

Members of the Inclusiveness Committee compile information and present the results.

Joe asked Eleanor and Trevor to come into his office a couple of weeks before the next Inclusiveness Committee meeting. "I'd like to ask you two if you'd work together to compile the information we've collected," said Joe. "I've read the next chapter, and we're a little ahead of the game, since people have been reporting back on their findings as we go along. But it would be very useful to bring everything together. And I think you two would make a great team. Trevor, could you compile the available facts? And Eleanor, could you compile the stakeholder perceptions?"

"Sure, Joe," said Eleanor. "Of course," said Trevor.

"Take your time," he said. "We're doing the staff inclusiveness training with Ed next month on communicating across cultures, and I don't expect we'll get the committee together until after that session."

Trevor and Eleanor sat down with the workbook and the reports that they'd received from the other staff members over the last three months. Using the worksheets, they compiled the data into four categories: Available facts quantitative and qualitative, and Stakeholder Perceptions, quantitative and qualitative. Instead of following Joe's suggestion, Trevor compiled the quantitative data and Eleanor the qualitative for both areas. Afterwards they worked together to identify any trends they'd seen.

Trevor noted that while the staff was fairly diverse, the Board was not at all diverse. Eleanor reported that several Board members had themselves brought up this issue, and that interviews with other community health clinics had revealed that CHC was one of the only remaining community clinics in a city of their size and demographics that had an all-white Board.

"Gee," said Trevor. "I'd hate to bring this up to Mrs. Dreyfuss."

By comparing the focus group data from the patient group with quantitative information on patient visits, they identified that patients vastly preferred receiving care from a professional who spoke their own language, yet only 15 percent of visits were conducted in the patient's native language. "Luisa will be interested in this," said Eleanor, "but she won't be surprised. This is what she's been telling us for years. Frankly, I thought she was projecting her own concerns. That's obviously not the case."

The findings that proved most interesting to Eleanor related to CHC's donors. She and her assistant had reviewed the guest lists for the fundraising events in the last two years, and they found that only 5 to 8 percent of the people who came to their events represented any type of diversity. Yet the donations that came in through their contribution boxes in the clinics represented a fairly diverse group. "This shows that people from all communities would support us," said Trevor.

"It does," said Eleanor. "I've always had a picture of our potential donors as wealthy, social, and I'll admit it - white. I've got to change my thinking."

At the next Inclusiveness Committee meeting, the first topic was the "communicating across cultures" session. Committee members were enthusiastic, especially Luisa.

"This was the best one yet," she said. "I learned so much about what people assume based on non-verbal communication. I never thought about that! That Ed is very good, Joe."

"What do the rest of you think of Ed and our "valuing differences" trainings?" Joe asked.

People shared quick, positive comments. Only Marcie was quiet.

"Marcie," Joe said. "What do you think?"

"Oh, Ed's doing a great job for where we are. It's just slower than I would like," she said. "But we're moving, and that's something."

"Okay, great. Speaking of moving ahead, Trevor and Eleanor will now present their compilation of the results of our information gathering. I've seen a preview, and I think you'll find the information to be very interesting."

EXERCISE 7-A

Identify Who Will Be Responsible for Compiling Data

Write the name of the person or persons who will be responsible for compiling the existing data below:

_____

Write the name of the person or persons who will be responsible for compiling the stakeholder perspectives data below:

_____

Date Exercise Completed _____

EXERCISE 7-B

Available Facts: Making Numerical Comparisons

This exercise allows you to compare whether your organization's demographics are similar to or different from the community's and the field's.

Instructions:
Refer to
- *Exercise 5-B: Selecting Facts to Collect About Your Community,*
- *Exercise 5-D: Selecting Facts to Collect About Your Field*, and
- *Exercise 5-E: Selecting Facts to Collect About Your Organization* for the data topics to include in your comparison.

Create a spreadsheet as follows:
- In one column record all of the <u>community</u> information that you collected, (e.g., race/ethnicity, class, language capacity, etc.).
- In another column, record any parallel information about your <u>field</u> (e.g., demographical information on typical users of an organization similar to yours).
- In another column, record any parallel information about your <u>organization</u> (e.g., demographical information on your board of directors, staff, etc.)

	Community	*Field*	*Organization*
EXAMPLE *language capacity*			
non-English speaking	*25%*	*40%*	*15%*
English only	*50%*	*30%*	*70%*
Bilingual/multilingual	*25%*	*30%*	*25%*

Date Exercise Completed _____

EXERCISE 7-C

Available Facts: Compiling Other Information

This exercise allows you to compare non-numerical data between your organization and your community and field.

Instructions:

Refer to
- *Exercise 5-B: Selecting Facts to Collect About Your Community,*
- *Exercise 5-D: Selecting Facts to Collect About Your Field*, and
- *Exercise 5-E: Selecting Facts to Collect About Your Organization* for the data topics to include in your comparison.

Create a spreadsheet or word processing document as follows:
- Put all of the non-statistical available facts that you gathered (e.g., personnel policies, etc.) into one document using either a spreadsheet or a word processing program. This will ensure that when you analyze the data you will have all the information you need for each category.
- Be sure to separate the data into categories. For example, create a heading that says "Mission" and put all of the information related to mission under that heading. Create headings for "Board of Directors," "Personnel," and so on, and place the information pertinent to each category under the appropriate heading.
- See example.

Topic	Facts About Community	Facts About Field	Facts About Organization
EXAMPLE Programs	*Another local arts organization also believes that its programs are under-utilized by individuals of color.* *Several artists of color in our community have recently received prominent national awards and press.*	*The national council for our field reports that the majority of organizations have looked to reach out to communities of color. Partnering with arts organizations based in communities of color and re-working advertising strategies have been successful methods for some organizations.*	*We do not currently have any programs featuring the work of artists of color.*

Date Exercise Completed _____

Sample Survey of Stakeholder Perspectives

The following is a sample of an inclusiveness survey. Then, after the sample survey, you will find an example of how the results from this particular survey might be compiled.

Thank you for agreeing to complete this short survey on the inclusiveness practices of _____ (name of organization). We seek to become more inclusive of communities of color. Your participation in this survey will influence our efforts. Your responses will be confidential. When you have finished the survey, please return it to:

contact person, name of organization, address

Your position with _____ (name the organization). (*Check the term that best describes your primary role with the organization*.):

_____ Staff
_____ Board
_____ Donor
_____ Former Board Member
_____ Former Staff Member
_____ Volunteer
_____ Client
_____ Community Partner (working closely with the organization)
_____ Community Leader
_____ Community Member

Your Race/Ethnicity
_____ African American
_____ Asian/Pacific Islander
_____ Latino/Chicano/Hispanic
_____ Middle Eastern
_____ Mixed Racial/Ethnic Background
_____ South Asian
_____ White/Caucasian
_____ Other _____

Please answer the questions below using the following scale and/or with a written answer:

1 = not at all
2 = a little bit
3 = somewhat
4 = quite a lot
5 = a great deal
dk = don't know

For the purposes of this survey, ***inclusiveness*** is defined as…

Organizational Mission

The mission of _____ (name of organization) is*...*
(Fill this in ahead of time so that respondents can reflect on the actual mission.)

1. Does the mission of _____ impact communities of color?
          1   2   3   4   5   dk

2. Do you feel that communities of color generally respond positively to
_____'s mission?
          1   2   3   4   5   dk

3. Are the values related to inclusiveness that are espoused by
_____ consistent with the values that it practices?
          1   2   3   4   5   dk

4. Do you have any suggestions about how _____'s mission
statement could be changed to expand inclusiveness?

5. Please provide further comments related to mission-related issues here:

Board of Directors

1. Do you feel people of color generally feel comfortable serving as members of the board of directors of _____?
        1   2   3   4   5   dk

2. Do people of color and white people generally serve as directors for the same amount of time?
        1   2   3   4   5   dk

3. Does the board of directors of _____ consider issues relating to race and ethnicity when it sets policies and makes decisions for the organization?
        1   2   3   4   5   dk

4. What could the board of directors of _____ do differently to become more inclusive, if anything?

5. What could the board of directors of _____ do differently to address the needs of communities of color, if anything?

Please provide further explanation on any governance-related issues here:

Personnel

1. Are people of color and white people with similar professional backgrounds and skills recruited and promoted equally at _____?

       1   2   3   4   5   dk

2. Has _____ been able to effectively retain people of color?

       1   2   3   4   5   dk

3. Are staff at certain levels of the organization more likely to be people of color than at other levels?

       1   2   3   4   5   dk

4. What factors have influenced retention among people of color at _____?

5. What could _____ do, if anything, to recruit and retain staff members of color at all levels?

6. Please provide further explanation on any personnel-related issues here:

Programs

1. Does _____specifically consider race/ethnicity and/or culture in designing and implementing programs?

      1   2   3   4   5   dk

2. Does _____make services available in geographic locations that are convenient and accessible to communities of color?

      1   2   3   4   5   dk

3. Does _____translate materials into languages that are spoken by communities of color in its service area?

      1   2   3   4   5   dk

4. Is there anything that _____does to hinder providing services to people of color? Please explain.

Please provide further explanation of any program-related issues here:

Date Exercise Completed _____

SAMPLE 7-E

Stakeholder Perspectives Likert Scale Responses (Quantitative)

Respondent ID #	Racial/Ethnic Background*	Stakeholder Group(s)	Mission	Mission Question 1	Mission Question 2	Mission Question 3	Governance	Board of Dir. Question 1	Board of Dir. Question 2	Board of Dir. Question 3	Personnel	Personnel Question 1	Personnel Question 2	Programs	Programs Question 1	Programs Question 2	Programs Question 3
1	W	S		4	2	2		3	5	1		4	5		2	1	1
2	SA	FS		3	2	5		4	4	4		2	2		4	3	3
3	L/C/H	B		4	4	4		3	3	2		2	3		5	4	4
4	W	B		5	5	4		5	4	4		dk	dk		3	4	4
5	W	S		dk	3	3		3	dk	dk		4	3		2	2	2
6	AA	FB		4	5	4		dk	dk	dk		dk	dk		3	2	1
	Total Score			20	21	22		18	16	11		12	13		19	16	15
	Total # of responses			5	6	6		5	4	4		4	4		6	6	6
	Average score			4.0	3.5	3.7		3.6	4.0	2.8		3.0	3.3		3.2	2.7	2.5

*Racial/Ethnic Background Code
AA = African American   S = Staff
API = Asian/Pacific Islander   B = Board
L/C/H = Latino/Chicano/Hispanic   C = Client
ME = Middle Eastern   FS = Former Staff
MX = Mixed Racial/Ethnic Background   FB = Former Board
NA = Native American/American Indian   dk = don't know
SA = South Asian
W = White/Caucasian   Scale of 1 - 5, with 1 being the lowest
O = Other

Sample Stakeholder Perspectives Narrative Responses (Qualitative)

Question Number	Respondent ID #	Respondent's Stakeholder Group	Racial/ Ethnic Background	Comments from Respondents
Mission Q1	2	FS	SA	Communities of color are in great need of XYZ's work.
Mission Q4	5	S	W	It should explicitly state that serving diverse communities is a priority.
Mission Q4	4	B	W	It is great the way that it is; it's generic and it speaks to everyone's needs.
Mission Q5	6	FS	AA	There's a myth at XYZ organization that they are already serving the needs of communities of color adequately, which isn't true.
Governance Q3	1	S	W	The board tries to address issues of race but without more diversity it's very hard.
Governance Q3	3	B	L/C/H	The Board did a good job when it created a policy regarding bilingual language capacity - now it needs to be implemented.
Governance Q5	6	FB	W	Become more diverse; develop advisory committees with p.o.c.
Personnel Q1	1	S	W	We try to recruit people of color but they don't seem to want to work for us
Personnel Q1	3	B	L/C/H	People of color won't be interested in XYZ organization until its programs are more responsive to communities of color.
Personnel Q3	6	FB	AA	The ED has only limited knowledge about communities of color so she doesn't recruit effectively.
Personnel Q3	6	FS	AA	There's a lot of good effort made to recruit people of color but the organization is based in a mostly white community so people of color are not as interested in working there.
Programs Q3	2	FS	SA	Good work translating into Spanish; could improve with more Vietnamese translations.
Programs Q4	4	B	W	The staff are diverse.
Programs Q4	1	S	W	The executive director has prevented staff from developing new outreach programs that would help us learn more about communities of color.
Programs Q5	2	FS	Y	There's a lack of basic knowledge about communities of color,E1 especially immigrant communities. For example, there are concerns among immigrants around utilizing law enforcement due to fears of deportation that staff don't seem to get.

EXERCISE 7-G

Stakeholder Perspectives: Compiling Likert Scale Responses (Quantitative)

Instructions:

*Using the spreadsheet provided as a model (*Exercise 7-E: Sample Stakeholder Perspectives Likert Scale Responses*), create a document with all of the numeric answers provided by your stakeholders.*

To the extent possible, be sure to keep the data segmented by category. This will be useful when you analyze the data in each of the subsequent modules.

Date Exercise Completed _____

EXERCISE 7-H

Stakeholder Perspectives: Compiling Narrative Responses (Qualitative)

Instructions:

*Using the example provided as a model (*Exercise 7-F: Sample Stakeholder Perspectives Narrative Responses*), create a spreadsheet with the verbal or written responses to survey and interview questions for all non-numeric questions.*

To the extent possible, be sure to keep the data segmented by category. This will be useful when you analyze the data in each of the subsequent modules.

Date Exercise Completed _____

Stakeholder Perspectives Compiling Focus Group Responses

Instructions:

Write a report on each focus group.

Summarize the findings by category (e.g., Mission, Board of Directors, Personnel). This will be useful when you analyze the data in each of the subsequent modules.

Include one or more of the following elements:
- *Themes*
- *Verbatim transcripts*
- *Insightful comments and suggestions*

END-OF-MODULE CHECKLIST

Module 7

Action Item	Date Completed	Notes
Select person(s) to compile data.		
Compile available facts (quantitative).		
Compile available facts (qualitative).		
Compile stakeholder perspectives (Likert scale responses; quantitative).		
Compile stakeholder perspectives (narrative responses; qualitative).		
Compile stakeholder perspectives (focus group responses; qualitative).		
Share data compilations with Inclusiveness Committee.		

Recognize your progress to date and communicate it to appropriate stakeholders.		