Data Collection Planning Toolkit

WHY Make a Data Collection Plan?

When we think of collecting data, sometimes we just want to dive in and start asking questions! But it's so important to step back and take the time to plan out your data collection:

WHY are you collecting the data?

WHICH are the best ways to collect the data?

WHAT do you want to know?

Also, when we hear “evaluation” and “data collection”, we often think of a report that tells the progress and impact of a project. However, there are many other important reasons why we collect data. Evaluation is the systematic and intentional process of gathering and analyzing information to inform decision-making. A data collection plan helps determine which decisions you are trying to inform, and the best process to gather and analyze the data.

WHAT is a Data Collection Plan?

Data collection planning is also an equity principle! Communities can get pretty tired of having data collected from them all the time - surveys, interviews, questionnaires - especially if they don’t ever hear back about the data collected. Intentional data collection is a lot of work. A plan keeps you and your team on the same page, while building the capacity of everyone involved by growing new skills in evaluation.

A data collection plan helps make intentional decisions about what we will evaluate, what tools we’ll use, who will collect the data, and how we will use the data we collect. The key is starting with the end in mind, thinking through how you plan to use the information in the end, so you don’t waste time or resources on unnecessary data collection.

Planning makes sure you are collecting only necessary data and respecting the time and effort input from participants.

A good data collection plan should include:

Evaluation Questions
What are the overall questions you’re trying to answer?

Logistics
Who, when, and how will data be collected?

Sense-making Plans
How will you make sense of (analyze) what you collect?

FOR MORE ON ANALYZING YOUR DATA, SEE OUR SENSE-MAKING TOOLKIT

HOW to Make a Data Collection Plan

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Determine Your Evaluation Questions

First, you need to identify what you want to learn from collecting this data - in this toolkit we're calling these your evaluation or overall questions. Evaluation questions are different from the questions you will use in your specific data collection tools, like interviews or surveys.

For example, your evaluation question might be, "To what extent are Avondale community members more connected since the beginning of our program?" but when you go to ask community members their thoughts on this evaluation question, you'll probably use different questions like, "Who are you connected to in your community? What kinds of things encourages your connection to these people?" It's important to know what you want to be able to answer through the evaluation, so you can pick the right tools to answer the question (Step 2).

Tips for Evaluation Questions

Good Evaluation Questions are...

- Clear and specific (it is clear what you are studying) but not too narrow
- Measurable, given your resources and experience
- Meaningful to your audience

Types of Evaluation Questions

Use the table below to think about the type of evaluation questions that make sense for you and your team.

Type of Evaluation Question	Why and when should I use it?	How do I build the question?	Example Evaluation Questions
Learning Questions	When you want to explore the community context before starting a new project When you are in the beginning stages of designing a new project/program When you want to improve general understanding of your work When you want to improve your program and equity strategy When you want to look at patterns and trends in your programs to see what lessons can be learned for the future	What + [topic, event, program] + exist? What is + [working; not working] + about [program, event, topic]?	What resources currently exist for the LGBTQ community in this region? What gaps in resources exist? In what ways are folks already doing this work interested in power building among the LGBTQ community in the region? What are community thoughts and reactions to meetings?
Development Questions	When you are adapting in complex and changing conditions When you need to make some changes to your program, events, meetings, etc. When you want to know more about whats inside of your control, and what is outside of your control	[How] is + [program, groups, event] + [affected; influenced; limited] by + [larger environment; the city; the broader community]?	How is incorporating language justice into courts affected by the city government? What is outside of your control? In what ways can you respond or adapt?

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Type of Evaluation Question	Why and when should I use it?	How do I build the question?	Example Evaluation Questions
Outcomes / Results Questions	When you want to track progress towards short- medium- or long-term goals When you want to tell a story of the impact of a project/program When you want to know what results happen for specific groups of people When you want to identify early problems When you want to ensure that a program, project, event is effective When you want to decide where to put more resources	[To what degree did] + [program, event, organization, goals] [increase, decrease, improve, change] + [outcome of interest]?	To what degree are meetings increasing a sense of community in Grand Valley? To what degree did data storytelling change the way communities view data, evaluation, and reporting? To what degree is funding being used to change health equity in the community?
Accountability / Reach Questions	When you want to know where, when and how your projects are reaching people in your community, and how well When you want to track specific actions (outputs, inputs, events) to show goals and targets are being met When you want to ensure your projects are meeting the needs of your community When you want to show funds are being used efficiently	[Did, to what degree did] + [person, model, program, event] + [implement, complete, create] + [product, service, environment, opportunities]?	To what degree did your team achieve their goal of 50 community welcome baskets for diverse groups of people in our community? To what degree did the youth team implement the summer career opportunities events in the San Luis Valley?

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Choose Your Methods

Methods are simply the ways in which you collect data - things like interviews, surveys, focus groups and polling. What methods we choose depends on what it is we want to know and what opportunities exist to meet with people who can share their perspective.

Keep in mind there are two different types of data collection:

Primary

This is data that has been collected firsthand by you or your team.
This allows you to go deeper into topics because you can create your own questions.

Secondary

This is data that you gather from existing sources of information.
This means you do not have to create a new tool in order to gather data because it is already out there.

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Method	Good for when...	Who do I talk to?
Record / Document Review Secondary	… there is a lot of information already out there about your topic … you are building your project on the shoulders of many other organizations' historical work	Existing information/data (publicly-available data on the internet, articles, etc.) Emails / Conversations with community members Reviews or Reports from other programs Articles about the issue you're working on
Surveys Primary	… you want perspectives from a lot of different people on a broad topic … you have a few questions you want to ask wide variety of people … you have more close-ended questions that are easy to answer	General community members - get a wide reach to understand different perspectives (English/Spanish speaking, youth/older adults, immigrant/refugee, newer residents, business owners/government workers, etc.)
Interviews Primary	… you need to dive deeper on sub-topics that came out of other methods (like surveys) … you need specific information, on a specific topic, from specific people … you have more open-ended questions you want people to elaborate on	Program participants Community leaders (Local businesses, non-profits, etc.) Influential decision-makers who have information on the topic at hand (City councilors, teachers, etc.)
Focus Groups Primary	… you want to dive deeper on a few sub-topics that came out of other methods (like surveys) … you want to know more about perspectives from a specific group of people	Sub-groups (Spanish-speaking residents, LGBTQ+ youth, older adults, immigrant parents

One mistake evaluation often makes is asking the questions that are of greatest interest to the most powerful groups, which leads us down the path of reinforcing status quo. However, the evaluation questions we most likely need to answer are those that reflect the interests of people directly impacted by programs, events, etc. This is where real learning and transformation occurs.

Tips on METHODS

- **Co-create your methods** (e.g. surveys) with the people you are going to collect data from, to reduce power imbalances and bias
- **Use different methods together** (surveys + focus groups) to get a variety of information and ensure your findings are more accurate
- **Consider resources required** for each method. Online surveys are easier to administer but may not get all the information you need, while focus groups get you deeper, richer information, but take a lot of time and effort.

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Think About a Timeline

First, WHO will do the data collection?
You likely have several team members working together, so everyone needs to know their roles and responsibilities. It is always helpful to have a Data Lead, someone who is the head person of data collection and sense-making. For example, maybe Martha is leading the Focus Groups, but needs a notetaker for each one. Or maybe 6 different outreach assistants are doing interviews, and someone needs to keep everyone on track.

Then, WHEN will they collect the data?
Deadlines keep us on track towards our goals. Think about what month you want to complete your data collection in, and set some interim deadlines. The data collection template will help organize this information as well.

And, HOW will they clean and organize the data?
As you collect data, have a few individuals do an initial read through to ensure you have quality data and weed out the ones that might not be useful (an interview that didn't get any information, a failed survey) - this is called data cleaning. There are a lot of free options for collecting and organizing your data, like in the table below.

CHECK OUT THIS NOTE-TAKING TEMPLATE TO HELP YOU PLAN FOR YOUR INTERVIEWS AND FOCUS GROUPS

Type of Data	Suggested Platforms
Survey	Store: Google Forms Analyze: Google Sheets (great for quantitative data) or Google Docs (great for qualitative data)
Interviews	Store & Analyze: Google Docs or Microsoft Word
Focus Groups	Store & Analyze: Google Docs or Microsoft Word

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Think About How You Will Use the Data

Generally, there are two types of data:

Quantitative

Basically, this is numbers. For example, counting the number of events, participants, etc. This can also be based on the closed-ended questions on your surveys. Quantitative data is great for quickly communicating the reach of programs, giving the context of an issue, or comparing across groups of people. However, quantitative data alone gives us a limited picture of the story.

Qualitative

Qualitative practices are often referred to as the 'soft data' or stories and anecdotes from people. To be clear, though, qualitative data is just as rigorous as quantitative; it can be collected systematically and objectively just like quantitative data. Qualitative evaluation uses open-ended questions on surveys, focus groups or interviews to provide more detail than numbers can alone. Qualitative data is great for diving deeper on issues, telling a better story about the connection between a process (the way a project is done) and the outcome (the result).

Tips on Coding

You can take qualitative data and make it quantitative through a process called "coding". As a group analyzing the data, you make some agreements on what kinds of things (words, behaviors) mean something (a "code"). Using the codes, you count how many times a certain theme is coming up. Learn more about how to code your data in the sense-making toolkit.

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Make a Plan!

It's time to bring it all together - your evaluation questions, your methods, and when and how you'll collect and clean data. The best way to do this is in a table, like the one below, where you tie each of your methods back to one of your evaluation questions.

CHECK OUT THE GOOGLE DOC TEMPLATE OF THIS TABLE AND FILL IT OUT YOURSELF!

Evaluation Question	What method will you use?	Who will you collect the information from?	When will you collect it?	Who will collect it?	How will you clean and store the information?
What resources currently exist in the region for LGTBQ+ people?	Review existing datasets	• Montrose Police Department • Community Clinics in the region	Jan - Feb	Jennifer	Google Drive folder, upload the documents
	1-1 Interviews (~8 to 10)	• Community Development Organizational leaders • Faith Institution leaders (e.g. pastors)	Jan - Feb	Marcos	Interview notes taken in Google Docs, stored in a journal on our shared Google Drive here (link)
In what ways are residents of the Chester community connected to each other socially?	Community surveys (~100)	Community residents - make sure sample includes: • Spanish speakers (10) • Immigrant parents (10) • White, long-term residents (20) • Youth (30) • Older Adults (30)	Mar - May	Community Outreach Assistants	Surveys will be administered through a Survey Monkey link. Marcos will download and a spreadsheet with all the results from Survey Monkey on 4.6.20 in our shared Google Drive
In what ways are inequities experienced by residents of Chester County in regards to social determinants of health?	Focus groups (4)	• Spanish speaking youth (2) • Spanish speaking adults (1) • English speaking youth (1)		Luisa	Jennifer will be the notetaker. All notes will be taken in google docs and shared on our Google Drive folder here (link)

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Ensure Privacy and Consent

Practices around identity, privacy and confidentiality are especially important in this work. You want to collect data in ways that promote community connection as opposed to fear and distrust. This includes 1) getting informed consent, 2) being intentional about demographic data, and 3) storing data securely.

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Make a consent form

You need to get consent from the people you are collecting data from either orally or in writing. It may differ depending on your methods, but a general consent form at the beginning of your project ensures your team knows the importance of consent and where to find that information. A good consent form includes:

- A choice about whether to participate or not (No one should feel pressured to participate in evaluation; it should be voluntary)
- The purpose of the evaluation, and what is being asked of them and why
- Any risks or benefits to them for providing the information
- Who owns the data, how the information will be used and by whom
- Who they can contact if they have questions or concerns

CONSENT STATEMENTS

Consent statements do not need to be long. As an example, a consent statement can look like the following:

Thank you for taking the time to speak to us about your community. This interview will take about an hour of your time. It asks questions about your experience with your community. We plan to use this information to find ways that we can work together to strengthen what you love about your community and improve the challenges about living here. You may choose to answer all or none of the questions.

If you would like to provide feedback, or have any questions or concerns before, during or after the interview, please contact Lora Jones at (555) 555-5555 or ljones@gmail.com.

CHECK OUT THIS EXAMPLE CONSENT FORM FROM FORT MORGAN CULTURES UNITED FOR PROGRESS!

Decide if/how you'll collect demographic information

Demographics include data that socially locates an individual (i.e. race, gender, age, education, income, sex, religion, etc), which can be super helpful for making sense of data you've collected down the road, especially when talking about equity and disparities. For example, to understand how different groups of people are experiencing a community issue (transportation), it will be useful to collect age and primary language spoken in your notes during an interview or focus group, because you might notice a specific population (e.g. Spanish speakers, youth, seniors) being affected in different ways than others. Other demographics that could be important to your project may include: gender, race/ethnicity, economic status, sexual orientation, geographic location/county, type of job (service provider, business owner, government, resident).

Whether or not to collect demographic data is a choice you make in your data collection plan. As a general practice, we recommend the following:

- Demographics are only asked if they're directly relevant to the evaluation question. This means you should not collect it "just in case."
- Demographics should always be optional or have a "prefer not to answer" option
- Only the individual themselves can supply demographic information – this means we cannot answer for an individual or change their response based on how we identify that individual
- Demographic data is only reported in aggregated (group) form and only when necessary to tell the story Seek specific consent to share this information

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De-Identify Data

As you may have a lot of data from individual people, and you may have a lot of people looking at that data, the best practice to ensure privacy of those who have shared their personal data with you is to de-identify personal information. Assign a unique number or code to your individual surveys or interviews so that their name and demographic information is no longer associated with the data in the interview. For example, you could use a code like: (first two letters of participants name + last two letters of interviewers name + date of interview), so the title of the interview when you store it becomes something like : KRTU050420. Work with your team to come up with a unique identifier code that works best for you.

Store Your Data in a Secure Place

As you can see by now, you are going to have a lot of information! There are lots of options for storing files securely, but what is most important is that you make a plan for where data is stored, that it lives with the community and not one specific person, that your team sticks to that plan. We recommend Google Drive and use the sharing settings to make sure data (interview notes, survey responses, focus groups notes) is secured and to ensure privacy. To set the sharing settings on a Google Drive Document/Sheet:

- Open sharing settings (click on colored SHARE button)
- Type-in the email addresses of the specific people you want to share the notes with. Maybe this is the other team members doing data collection with you including the community outreach assistants, regional associates or your community partners.
- If you want to share via a URL link: under "Get Link," select “Restricted" so that only people added can open with this link, then click "Copy Link."

Make sure that one of the email addresses is accessible by the community team (e.g., staff@healthyfood.org), so that if there is staff turnover, access to the file is not lost.

Fill Out the Template

Now that you understand the process and tips for developing a Data Collection Plan, we created a template to get you started with your own team or community!

To fill out the template, please follow these steps:

1. Click this link to access the view-only Google Doc: https://bit.ly/3e9Y8i4
2. Go to "File" and click "Make a Copy"
3. Name your template and decide where you want to file it in your Google Drive
4. Fill out the template!

Questions? Feel Free to Contact Us:

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