**Worksheet 5: Collect Evaluation Data**

Complete this worksheet to identify your data collection methods. This worksheet has three major steps:

* Step 5.1: Identify indicators, data sources, and appropriate, ethical data collection methods.
* Step 5.2: Specify data collection details.
* Step 5.3: Plan data management methods.

Step 5.1: Identify indicators, data sources, and data collection methods for each evaluation question. Some evaluation questions may need more than one indicator.

Use the table on the next page to complete the following for each of your evaluation questions:

• Include the evaluation question in the top row. You can duplicate this page for each evaluation question or create your own table in Microsoft Word using this table as a guide.

• Identify appropriate indicators that can help you fully answer each evaluation question. Enter one indicator per row in the first column.

• Include appropriate data sources used to provide information for each indicator in the second column.

• Detail how you will collect these data from identified data sources, such as participant surveys or staff interviews in the third column.

− Include whether the data collection method will be in-person, over the phone, or virtual, and note any software you may use, such as Survey Monkey (survey) or Zoom (focus group).

− Include the specific data collection instrument item for each indicator to show where and how this information will be collected. Please also note if you need to develop a new instrument to collect this.

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| **Evaluation Question:**  |
| **Indicators** | **Data Sources** | **Data Collection Methods** |
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Step 5.2: Specify data collection details for each method. Use the table on the next page to complete the following for each of your data collection methods:

• List each data collection method identified in Step 5.1 in the first column. Enter only one data collection method per row. This column should include all data collection methods for your indicators across each of your evaluation questions.

• Identify who is responsible for collecting the data in the second column. This can be the title/position of the person responsible, the department, or the name of the organization/agency. Be as specific as possible to increase accountability.

• Describe when and how frequently data collection will occur for each method in the third column.

Note: You may need to build data collection instrument(s) or update existing instruments to appropriately collect your indicator data. Please see the case examples for data collection instrument examples.

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| **Data Collection Methods** | **Person Responsible for Data Collection** | **Collection Timeline and Frequency** |
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Step 5.3: Plan data management methods for each data method. Use the table on the next page to complete the following for each of your data collection methods:

• Include data methods in the first column, including how you will transfer the data from the data collection instrument, store the data, and check for quality.

• Describe how each type of data will be stored and managed in the second column. Include any program, software, or resources you will need to store and manage the data.

• Include who is responsible for management in the third column. Consider if you will need to de-identify data to protect participant privacy, as well as any plans to destroy data after it is used. This can be the title/position of the person responsible, the department, or the name of the organization/agency. Be as specific as possible to help increase accountability.

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| **Data Collection Methods** | **Data Management Plan** | **Person Responsible for Management** |
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