TOOL #4: DATA COLLECTION: STEP-BY-STEP PROCESS TEMPLATE

The Evaluation Process helps to manage and monitor program impact throughout the life cycle of a program. Key affected parties involved include program staff (their role), M&E team (their role), strategic partners (their role), and others.

This process sheet can be used to design and implement data collection processes and should include dates, tasks assigned to specific individuals, and descriptions of how the data will be used. Feel free to include survey links for drafts and final tools to document the process.

This process sheet should be a guide, not a rule book, to increase efficiency without compromising intentionality.

Please modify it as needed, but keep a record of changes and reasons for changes as other programs may learn from your adaptations. This template (as modified to fit your context) can be used consistently across years and across programs.

Ecotrust

Designed by Austin Advocates With LLC, modified by Ecotrust

Designing Data Collection Processes

For List of Instruments Refer to the Methods section of the [Thumbnail.](#))

EXAMPLES: Survey Sequence	Brief Description
1. Intake Survey	A survey conducted at the beginning of a program to gather information about participants, possibly including their hopes and expectations for the program.
2. Midpoint Survey	A survey conducted during the course of a program to gather information about participants' experiences to date.
3. Endline Survey	A survey conducted at the end of a program to gather information about participants' experiences of the whole program.
4. Feedback or Follow-up Survey	A survey distributed after a program, event, or other engagement has concluded, to gather information about participants' experiences and takeaways.

List of Possible Instruments:

- Survey Sequences:
    - Program: Intake/Baseline, Midpoint, Endline, Follow-Up
    - Event Feedback (webinar, in-person, etc.)
- Interviews:
    - Program: Intake/Baseline, Midpoint, Endline
- Check-ins (1:1, 2:1, etc.):
    - Program: Intake/Baseline, Midpoint, Endline
- Focus Groups
- Observation Sessions
- Listening Sessions
- Document Review

EXAMPLE 1. Survey

Phase 1. Design

Why: What is the purpose of the survey? Why is this survey important?	
What: What will the survey questions try to measure? (Refer to Evaluation Questions in Thumbnail.)	
Who: Who are the members of the survey design team? What are their role/s in the process?	
Who: Who will review, pre-test, and approve the survey?	
Who: How many work hours will the survey design process require from each team member?	
When: What are the start and due dates for the initial (draft) survey design?	
When: What are the start and due dates for the survey review, revision, and approval?	

Phase 2. Distribution and Data Collection

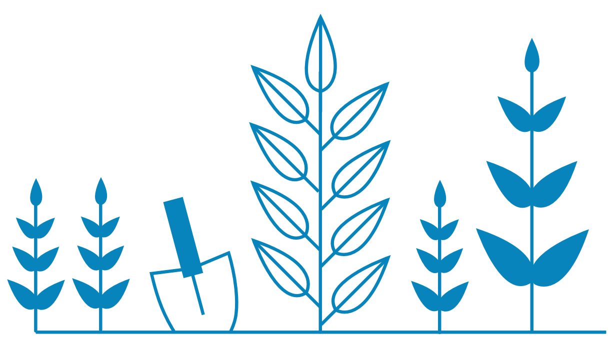
Who: Who will distribute the survey? How many additional work hours will distributing the survey require?	
How: How will the survey be distributed (email, in-person, iPad, social media, etc.)?	
How: How will the data be collected? What tools will be used? (E.g., paper survey forms, software such as Google Forms, SurveyMonkey, etc. More than one tool can be used.)	
When: When will the survey be distributed? What are the open/close dates?	
When: How many follow-up reminders will be sent to potential participants? Who will draft those reminders? Who will send them? When will they be sent? *Suggestion:* send out at least two reminders, one 1 week before the survey close date, and one more 2-3 days before the close date.	
By whom: Who will take the survey? (E.g., program participants)	

By whom: How many people do you want to take the survey? What is the target number of survey respondents? What is the minimum number of respondents?	
By whom: How much time will it take respondents to fill out the survey?	
By whom: What, if any, incentive will be provided for taking the survey? (E.g., gift card, stipend, etc.)	
By whom: Will you follow up with folks who do not complete the survey? If so, when (e.g., within 1 week) and how (e.g., verbal check-in, email, phone call, Facebook message, etc.)?	

Phase 3. Data Retrieval and Analysis

Who: Who will be allowed to see the data?	
Who: Who will retrieve, export/download, and analyze the data for findings?	
Who: How many work hours will data retrieval and analysis require of each team member?	

For whom: Who will have access to the findings? Who will not have access to the findings?	
When: When will the data be analyzed? What is the due date for the analysis?	
What: What methods will be used to analyze the findings? (E.g., summary statistics, word frequency analysis, etc.)	
When: When will the findings be presented or shared?	



EXAMPLE 2. Interview

Phase 1. Protocol Design

Why: What is the purpose of the interview? Why is this interview important?	
What: What questions or issues will the interview questions try to understand? (Refer to Evaluation Questions in Thumbnail.)	
Who: Who are the members of the interview protocol design team?	
Who: Who will review, pre-test, and approve the interview protocol?	
Who: How many work hours will the interview protocol design process require from each team member?	
When: What are the start and due dates for the initial interview protocol?	
When: What are the start and due dates for the protocol review, revision, and approval?	

Phase 2. Distribution and Data Collection

Who: Who will conduct the interviews using the protocol?	
How: How will the interviews be conducted? (E.g., in-person, Zoom, phone. More than one method can be used.)	
How: How will the interview be recorded? What tools will be used? Who will be responsible for those tools? (E.g., Notetaker, voice recording, Zoom recording, AI assistant, etc. More than one tool can be used.)	
When: When will the interview period begin and end?	
Who: How many interviews do you aim to conduct? What are the minimum, target, and maximum numbers of interviews?	
By whom: Who will be interviewed? (E.g., current program participants, former program participants, members of the public)	

How: How will you recruit interviewees? (E.g., in-person announcements at meetings; emails; phone calls; social media)	
By whom: How much time will each interview take? (A range is okay, e.g., 30-60 minutes)	
By whom: What, if any, incentive will be provided for being interviewed? (E.g., Gift card, stipend, etc.)	
By whom: What, if any, logistical support will you provide interviewees (E.g., travel, transportation, child care)?	

Phase 3. Data Retrieval and Analysis

Who: Who will be allowed to listen to, view, and read the interviews?	
Who: Who will transcribe the interviews? Who will code the interview data?	
What: What methods (e.g. transcription software) will be used to transcribe the interviews? What methods will be used to code the data (e.g. tagging systems)?	
Who: Who will analyze the interview data?	
What: What methods will be used to analyze the findings? (e.g., word frequency analysis, etc.)	
Who: How many work hours will data transcribing, coding, and analysis require of each team member?	
When: By when will the interview data be transcribed, coded, and analyzed?	
When: When will the findings be presented or shared?	

Phase 4. Meaning-making and Reporting

Who: Who will be responsible for sharing the findings? Who will facilitate meaning-making sessions?	
With whom: Who will be invited to meaning-making sessions? With whom will findings be discussed for meaning-making purposes? Who will be in the room when next action steps/recommendations are generated? Who will decide how findings will be used? Who will decide with whom specific findings will / will not be shared?	
When: When will meaning-making discussions happen? How many discussions, of what length, and before what date?	
How: How will the findings be used? (E.g., program refinements, grant reporting, etc.)	
Who: Who will conduct reporting activities?	
For whom: Who will receive reports?	