How to design an evaluation plan, part 2: Plan for data collection

Did you identify the best sources of reliable data to answer the evaluation questions? Ask yourself these questions:

- Which source is likely to provide the best information? For example, you could gather information about blood pressure levels by asking patients to recall their latest results, but their medical records might be a more accurate source. How to decide? It may be helpful to do a spot check to compare self-reported blood pressure levels with those reported in patients' charts. That could help you detect the degree to which self-reported data are accurate.
- How easy or difficult will it be to gather the information you need from a particular source?

You will have to weigh the level of accuracy you need against the degree of difficulty in obtaining the information. Building on the previous example, how difficult will it be to access medical records? And if you can access them, how much time and money will be needed to do a medical records review? On the other hand, a question about blood pressure could be easily added to a patient questionnaire.

- Is there more than one source for a particular item of information? Using more than one source provides a check of your data, which can help you avoid bias in your results.
- Are there any existing data sources that would meet the evaluation's needs? Depending on your evaluation, some of the data you need may be available from an existing source. Using existing data may be less costly and time-consuming than collecting your own data, but it might not be as useful. It should only be used when it fits intended purpose of your evaluation.

Have you identified the persons responsible, the timeline, and the budget for data collection to help you make your decisions about data collection methods?

- Who will be responsible for overseeing each data collection method? That person has to have the time and also the necessary skills, so if additional training is needed, factor that into your plan. Although one person will have overall responsibility for that activity, if more than one person is collecting data, all those involved need to coordinate and ensure they are collecting data in a consistent way.
- What is the timeline for data collection? What will be collected by when and/or at what intervals? This may be driven by many factors, such as when your program activities will occur. Set an end date for each method so you can project when all data collection will be completed.
- What is the budget for data collection? What resources will you have for this part of your evaluation? This may drive decisions about the feasibility of data collection methods and frequency.

Have you considered the advantages and disadvantages of a range of data collection methods?

Collecting new data for your evaluation

Method	Purpose	Advantages	Disadvantages
Questionnaires, surveys, checklists	Get lots of information from people in a non-threatening way	• Can be anonymous • Can be inexpensive to administer • Easy to compare & analyze • Administer to many people • Can get a lot of data • Sample questionnaires already exist	• Might not get careful feedback or the full story • Wording can bias responses • Impersonal • May need sampling expert for large scale or community surveys
Interviews	Fully understand someone's impressions or experiences, or learn more about their answers to a survey	• Get full range and depth of information • Develops relationship with interviewee • Can be flexible with interviewee	• Time intensive • More expensive for each respondent • Interviewer can bias client's responses
Focus groups	Explore a topic in depth through group discussion to get people's reactions to an experience or suggestion, understanding common complains, etc.	• Quickly and reliably get common impressions • Can be an efficient way to get much range and depth of information in a short period of time • Can convey key information about programs to participants • Useful in evaluation and marketing	• Need good facilitator for safety and closure • Managing recruitment and logistics can be time consuming • Typically need to provide incentives
Observation	Gather accurate information about how a program operates, particularly about processes	• View operations of a program while it is actually occurring • Can adapt to events as they occur	• Can be difficult to interpret behaviors • Can be complex to categorize observations • Can influence behaviors of program participants • Can be expensive and time consuming

Leveraging existing data sources

Method	Purpose	Advantages	Disadvantages
General document review (applications, finances, memos, minutes, etc.)	Impressions of how the program operates without interrupting the program	• Get comprehensive and historical information • Doesn't interrupt program or program participants • Information already exists • Few biases about information	• Time intensive • Information might be incomplete • Need to be clear about what you're looking for • Data is restricted by what already exists
Electronic database queries (EHRs, population health registries, program databases, etc.)	Leverage electronic databases to gather specific data on individual health outcomes or clinic processes	• Often includes the advantages of document review (above) • Leverages data already being collected on items of interest like health outcomes and services provided to individual patients/participants	• Often includes the disadvantages of document review (above) • Can require access to patient/participant level data • Requires specialized knowledge about how to extract the data from the electronic system • Creating customized reports can be time consuming • May require data mapping and validation process to ensure data in report are reliable
Secondary data (Cottage Health2Go, etc.)	Use publicly available data sets to understand the needs of your community or region	• Allows programs to understand needs and health outcomes at a community level • Is available before your program starts	• Is not specifically about program participants or outcomes • It might not directly answer your questions

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Have you done a quality check on the data sources and methods you have selected?

As you are selecting your data sources and methods, consider the following quality check questions. This will help ensure the evaluation serves its purpose and meets the needs of your stakeholders.

- **Useful –** Will the data collected be useful to your program? Is this information source best suited for the job? Will the data sources and methods you selected provide you with the information that you need to demonstrate achievement and make improvements. Will your stakeholders see these data as credible and useful?
- **Feasible –** Are these data available? Consider the time, resources and expertise you have available to carry out data collection efforts. Consider what data you are already collecting or have access to, and if they could be used to answer your evaluation questions.
- **Ethical –** How intrusive is the data collection method? Will your data collection take a lot of participants' time away from the program itself? How will you ensure the confidentiality of participants' responses?

  Is the method cultural appropriate? It's important to keep your target audience in mind, including their age, culture, language, literacy level, phone and computer access, and so on. For example, in some communities, having people tell stories in person may be a more effective and respectful way to collect data than administering a questionnaire.
- **Accurate –** Are your methods the right ones to measure what you want to measure? Have you considered using more than one method to collect data? Evaluations that use more than one method (also called mixed methods) provide stronger evidence because they gather data from different sources.

Take a look at the Case Study Example to see data sources and methods that the *Health Connect* program team created with their stakeholders. Once you have brainstormed and prioritized your data sources and indicators, you are ready to finalize your evaluation plan. After you add these pieces to the plan, be sure to look at it all together to make sure the pieces fit.

Case study example: The *Health Connect* Evaluation Plan

Evaluation Question	Indicator(s)	Data Source	Data collection method	Person/entity responsible	Timeline/frequency

This section of the evaluation plan is completed in part 1