

Data Collection Plan Worksheet

Use this worksheet to help you plan how to collect SCP Performance Measure Surveys. Consider it a working document and revise it to fit your needs.

For an example of a [completed worksheet](#), see page 6.

WHAT (task)	HOW (describe details, jot down your notes)	WHO (person responsible)	WHEN (schedule)	COMPLETION DATE
Talk to stakeholders: <ul style="list-style-type: none"> Who will you talk to? When and where? What should be included in the talking points? Do you want their help with data collection? 				
Put together lists of clients and caregivers: <ul style="list-style-type: none"> What information do you need to include about clients/caregivers on your lists? Who can provide this information? 	(Resource: <i>Client Survey Tracking Sheet</i> and <i>Caregiver Survey Tracking Sheet</i> samples)			
Determine how and when you will give out surveys: <ul style="list-style-type: none"> What is the most practical method for your project (in person, by telephone, mail, or some combination)? What materials do you need? When do you need to report results? (Work backwards from there to schedule tasks.) 	(Resource: Task Lists for Data Collection Methods)			

Data Collection Plan Worksheet (continued)

WHAT (task)	HOW (describe details, jot down your notes)	WHO (person responsible)	WHEN (schedule)	COMPLETION DATE
Prepare survey helpers (if needed): <ul style="list-style-type: none"> • Who will be trained? How much training do they need? • What resources will you need? • Who will train them? • When and where will training take place? 	(Resource: <i>Survey Helper Training Materials, at the National Service Knowledge Network</i>)			
Distribute the surveys and follow up with people who haven't responded: <ul style="list-style-type: none"> • How and when will you follow up? • Who can help? • What materials do you need? 				

Task Lists for Data Collection Methods

Following are basic task lists for collecting surveys in person, over the telephone, or through the mail.

Task List: Giving the Survey in Person

To hand deliver the surveys, you will need:

- Lists of clients and caregivers with addresses
- Copies of the survey
- Sealable envelopes
- Trained “survey helpers” (if you have people assisting)
- Written instructions/script for survey helpers

IN PERSON SURVEY Tasks
1. Make lists of the clients and caregivers who should get a survey and their addresses.
2. Download surveys and make copies.
3. Determine who can give the surveys to clients/caregivers (survey helpers).
4. Train survey helpers on how to: <ul style="list-style-type: none"> • introduce survey and provide instructions, answer questions; • use sealed envelopes for completed surveys and maintain confidentiality • return completed surveys; and • record whether surveys were completed or need follow-up.
5. (If clients or caregivers need assistance) Train survey helpers to give the survey to a client/caregiver by reading the survey and marking their answers (interview format). Survey helpers who assist should be staff or volunteers who do not directly serve the client/caregiver.
6. Survey helpers collect surveys.
7. Collect all surveys from survey helpers and store them in a safe place.

Task List: Giving the Survey over the Telephone

To do the survey with clients and caregivers over the phone, you will need:

- Lists of clients and caregivers with telephone numbers
- Copies of the survey
- Trained “survey helpers” (if you have people assisting)
- Written instructions/script for survey helpers

TELEPHONE SURVEY Tasks

1. Make a list of the clients and caregivers who should get a survey with phone numbers.
2. Download surveys needed and make copies.
3. Decide when calls will be made and how much time you will need (assume 10-20 minutes per person).
4. Decide who will do the interviews (survey helpers, if available).
5. Train survey helpers on how to:
 - introduce survey and provide instructions, answer questions;
 - read questions and responses in a neutral manner;
 - mark answers on the survey form;
 - maintain confidentiality;
 - record whether surveys were completed or need follow-up; and
 - store completed surveys in a safe location.
5. Project Director/staff should let clients/caregivers know about the survey in advance and schedule the calls if needed.
6. Survey helpers conduct surveys.
7. Collect all surveys and store them in a safe place.

Task List: Mailing the Survey

To mail the survey, you will need:

- Lists of clients and caregivers with addresses
- Copies of the survey
- Copies of the cover letter
- Envelopes and postage
- Self-addressed, stamped envelopes
- Thank you/reminder postcards and postage

MAIL SURVEY Tasks

1. Make a list of the clients and caregivers who should get a survey with mailing addresses.
2. Download surveys needed and make copies.
3. Write a cover letter explaining the survey and make copies.
4. Put together the mailing. Each stamped envelope is addressed to the client/caregiver and includes:
 - Cover letter signed by the Project Director;
 - Blank survey form; and
 - Self-addressed stamped envelope.
5. Mail out the surveys.
6. Remind clients/caregivers who have not completed the survey to do so (for example, send a general thank you/reminder postcard to everyone after about 5 days).
7. Collect all surveys and store them in a safe place.

Data Collection Plan Worksheet **Completed Example**

WHAT (task)	HOW (describe details, jot down your notes)	WHO (person responsible)	WHEN (schedule)	COMPLETION DATE
<p>Talk to stakeholders:</p> <ul style="list-style-type: none"> Who will you talk to? When and where? What should be included in the talking points? Do you want their help with data collection? 	<p><i>Set up a conference call with supervisors (9) and invite all advisory council members.</i></p> <p><i>Email draft data collection plan prior to call.</i></p> <p><i>Agenda:</i></p> <ul style="list-style-type: none"> <i>Purpose of surveys, who we want to do them, that they are confidential and optional, etc.</i> <i>Walk through the plan and discuss. Asking 6 stations to participate. Point out where we need their help (client/caregiver lists; supporting Senior Companions as survey helpers).</i> <i>Can they provide help? Do they think timing will work? Any other issues?</i> 	<p><i>James (scheduling); Delia (talking points and lead the conference call)</i></p>	<p><i>Schedule a call for week of Sept. 9-13</i></p>	<p><i>Sept. 13</i></p>
<p>Put together lists of clients and caregivers:</p> <ul style="list-style-type: none"> What information do you need to include about clients/caregivers on your lists? Who can provide this information? 	<p><i>Six stations participating: Rosa Williams Senior Center; Greenville Senior Center; Greenville Community Center; UCLB Health Center; Beehive Family Resources; Clay County Senior Resource Center</i></p> <p><i>For each client and caregiver, can we get:</i></p> <ul style="list-style-type: none"> <i>Name and contact information</i> <i>Beginning date of service</i> <i>Disability or special needs (that would affect ability to complete a survey)</i> <i>If a surrogate respondent is needed and their contact information</i> 	<p><i>Supervisors: E. Yuen J. Smith E. Barry C. Lopez J. Guerra L. Wen</i></p>	<p><i>Sept. 15 - Oct. 15</i></p>	<p><i>Oct. 15</i></p>
<p>Determine how and when you will give out surveys:</p> <ul style="list-style-type: none"> What is the most practical method for your project (in person, by telephone, mail, or some combination)? What materials do you need? When do you need to report results? 	<p><i>For clients: in person</i></p> <p><i>For caregivers: in person</i></p> <p><i>check numbers</i></p> <p><i>Materials: 350 SCP Independent Living PM surveys; 60 SCP Respite PM Surveys; 410 stamped envelopes (may also want cover letters)</i></p> <p><i>Report is due January 10. All surveys should be collected by Dec. 6.</i></p>	<p><i>James and Delia</i></p>	<p><i>Oct. 28 – Nov. 30</i></p>	<p><i>Dec. 6</i></p>

Data Collection Plan Worksheet Completed Example (continued)

WHAT (task)	HOW (describe details, jot down your notes)	WHO (person responsible)	WHEN (schedule)	COMPLETION DATE
Prepare survey helpers (if needed): <ul style="list-style-type: none"> • Who will be trained? How much training do they need? • What resources will you need? • Who will train them? • When and where will training take place? 	<i>Delia, James, and 2 SCP Leaders will train Senior Companions as survey helpers at October in-service meetings.</i> <i>Dates: Oct. 15, 17, 22, 24</i> <i>Location: Greenville Community Center, Cherry Hill Project Main Office, and UCLB Health Center</i> <i>Resources: Survey Helper Training Sessions</i> <i>Materials: 150 Survey Helper packets</i>	<i>Delia and James</i>	<i>Oct. 15-24</i>	<i>Oct. 24</i>
Distribute the surveys and follow up with people who haven't responded: <ul style="list-style-type: none"> • How and when will you follow up? • Who can help? • What materials do you need? 	<i>James will telephone clients and caregivers to remind them to do a survey. SCP Leader Julie can assist if needed.</i> <i>Materials: telephone numbers, tracking sheet with names of people who have not turned in a survey</i>	<i>James</i>	<i>mid Nov. to Dec. 3</i>	<i>Dec. 3</i>