

# *Collecting Performance Measurement Data*



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## Introduction

Performance measurement uses data—that is, systematically-collected information, relevant to your program—to assess whether your program achieved its intended results (outputs, intermediate outcomes, and end outcomes). Performance measurement data can come from the content of surveys, questionnaires and interviews, tallies from logs or checklists, tests, self-assessments and other methods. Your instruments may produce both qualitative data (e.g., notes from interviews, open-ended questions on a survey, observation notes) and quantitative data (e.g., test scores, statistics, and ratings). Data collection itself involves administering instruments as well as gathering and organizing responses for analysis. A well-planned data collection strategy is critical to obtaining reliable, consistent, and useful information about the effects of your program.

This packet will describe the steps you need to collect meaningful information for performance measurement. Each step includes explanations and examples. On page 10, you will find a sample Data Collection Plan. In addition, there is a blank Data Collection Plan on page 11 for you to complete as you work through this packet.

### Steps in Data Collection:

1. Identify Data Types and Sources
2. Identify Who Will Be Involved
3. Set a Schedule
4. Train Your Data Collectors
5. Pilot Test Your Collection Processes
6. Implement Your Data Collection



## Step 1

### **Identify Data Types and Sources**

During instrument development, you identified the data you need to measure results. An important initial step in planning for data collection is to make an inventory of the types of data you want to collect, where you will collect the data, and from whom you will collect the data. You may be collecting two types of data: existing and program-generated. Engaging in planning with organizations and people who will provide data before implementing data collection are important. Planning and stakeholder involvement will help ensure that the data are accessible and available in the form that you need.

<b>In identifying data and data sources, ask yourself the following questions:</b>	<b>Example</b>
What type of existing data will I need to collect?	<i>Neighborhood crime statistics</i>
Where will I get it?	<i>Police Department crime log</i>
What type of program-generated data will I need to collect?	<i>Neighbor ratings of neighborhood safety</i>
Where will I get it?	<i>Neighbor surveys</i>

**Data you need, data types, and data source information might look like the following:**

<b>Data You Need</b>	<b>Data Type</b>	<b>Data Source</b>
# of car break-ins and burglaries in neighborhood	Existing	Police crime log
# of neighborhood watch groups	Existing	Police records
Neighbor ratings of neighborhood safety	Program-generated	Neighbor surveys



### **It's Your Turn**

Turn to page 11 and complete the “Data You Need,” “Data Type,” and “Data Source” information for your national service program.

## Step 2

### ***Identify Who Will Be Involved***

It is important to involve stakeholders—as well as anyone who will be involved in collecting data—in your data collection planning. This will help eliminate issues that may impede or delay data collection. If permission to collect data is necessary, such as parental permission for student surveys or patient permission for access to immunization records, this must be arranged before data collection begins. Stakeholders not directly involved in data collection should also be informed of the data collection plan. Being clear up front about who will actually collect the data will eliminate confusion about people's roles and will help in thinking about whether or not data collectors are qualified and have the necessary access to collect the data. You will also want to consider the appropriateness of your data collectors (e.g., do not have participants collect satisfaction data about their own performance).

<b>To identify who will be involved, ask yourself the following questions:</b>	<b>Example</b>
What data will you be collecting?	<i>Individual child immunization data</i>
Who will the data collectors be?	<i>National service participants and Public Health nurses</i>
Who are the stakeholders?	<i>Parents, children, health center director, immunization program staff</i>
How do they need to be involved?	<i>Information release from parents, approval of health center director, cooperative agreement to collect data at immunization clinic from public health nurses</i>

**People involved in data collection information might look like the following:**

<b>Data Type</b>	<b>Data Collector/ Stakeholder/Other</b>	<b>Type of Involvement</b>	<b>Additional Issues</b>
Child Immunization Data	National Service Participants	Data collectors for post-service data	Need clearance from parents (release)
Child Immunization Data	Public Health Nurses	Data collectors for pre-service data	Must get their commitment prior to collection
Child Immunization Data	Health Center Director	Informed of program and will oversee public health nurse activities	Must get agreement regarding use of staff and access of national service participants to immunization records, provide with updates on data collected
Child Immunization Data	Parents	Informed of program; informed of child's immunization status	Must get their approval for release of child immunization information

***It's your turn***



Turn to page 11 and complete the sections “Data Collectors” and “Others Involved” with the names of people who will be involved in data collection for your national service program.

## Step 3

### Set a Schedule

Timing is one of the most critical elements of data collection. Many types of existing data, such as grades and crime statistics, may be available only on set schedules. In addition, people who can give you access to existing data (for example, teachers or camp counselors) may be less available at certain times of the year. To ensure that you plan your data collection for times when data are most likely to be available, involve those people you have listed in Step 2 that can give you access to existing data as early in the planning process as possible. It is a good idea to consult agency schedules and calendars. Timing is also important for program-generated data. It is critical that you have planned for the collection of pre-service/program data before services have been provided or very early in service provision. For example, if you are doing “neighborhood clean-ups” and want to measure a change in residents’ perceptions of their neighborhood, a pre-program survey should be completed before any cleanup begins.

Before developing your data collection schedule, ask yourself the following questions:	Example
What existing data do I need?	Reading grades
When are they collected?	Quarterly
When do I need to collect them?	At end of the last quarter, provided that tutoring begins at the beginning of the quarter
What program-generated data do I need?	Self-esteem ratings (self-assessment by students)
When do I need to collect them?	Before any mentoring and after mentoring is completed

**A data collection schedule might look like the following:**

Data Method	Data Collectors/ Data Source	Collection Deadline	Collection Date(s)
Pre-program Self-esteem Ratings	Teachers/ Students	Before program begins on 1/6	12/15-1/6
Pre-program Reading Grades	Teachers/ Teachers	At end of winter quarter in December	12/18
Post-program Self-esteem Ratings	Teachers/ Students	At end of program, but before summer vacation in June	5/27-5/29
Post-program Reading Grades	Teachers/ Teachers	At end of program, but before summer vacation in June	5/30



### It's Your Turn

Turn to page 11 and complete the sections “Contact Dates” and “Data Collection Dates” for your national service program.

## Step 4



### **Train Your Data Collectors**

To ensure that your data collection is consistent and accurate, it is important to train your data collectors. Provide clear instructions to your data collectors on how to use the relevant instruments (forms) and any other data collection activities (e.g., conduct interviews, run focus groups, etc.).

#### **Points to remember for training data collectors:**

- Walk through the instrument with your data collectors to point out specific instructions.
- Provide an example of a completed instrument for your data collectors.
- Provide clear instructions for your data collectors to follow.
- If you will conduct interviews or focus groups, allow interviewers and focus group facilitators to practice by “role playing.”
- Have your data collectors practice to make sure they are recording data in the same way.

<b>When planning your data collector training, ask yourself the following questions:</b>	<b>Example</b>
Which data collection methods will require training?	<i>Neighbor focus group</i>
Whom will I need to train?	<i>Neighborhood Watch Corps participants who will be focus group facilitators</i>
What training will this data collection require?	<i>Conducting focus groups, asking non-leading questions, following the focus group format, recording responses</i>
What will my training look like?	<i>Materials on conducting focus groups, one-day training, two-hour trial focus group</i>

#### **Data collector training information might look like the following:**

<b>Data Collection Method/ Instrument</b>	<b>Data Collectors</b>	<b>Training Needs</b>	<b>Training Activities</b>	<b>Training Date(s)</b>
Parent Interview	National Service Participants	Interviewing techniques, how to follow interview guide	Interview guide instructions, building rapport, how to ask questions, mock interview	8/15-9/1
Math Grades	Teachers	How to complete grade log/tally sheet	Instructions for tally sheet, mock data set	12/2-12/15
Student Goal Setting Plan	National Service Participants	How to complete and use plan	Instructions, mock student plan/data set	9/5-9/15

### **It's Your Turn**



Turn to page 11 and complete the sections “Training Needs” and “Training Dates” for your AmeriCorps VISTA project.

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## Step 5

### ***Pilot Test Your Data Collection Processes***

As previously mentioned, it is important to practice using data collection methods and instruments. A pilot test exercise can alert you to problems you will need to resolve before your scheduled data collection later. Keep your pilot test as realistic as possible. For example, to train data collectors to interview students, it would be ideal to have student interviewees of similar ages and backgrounds as those in the program for practice interviews.

#### ***Include the following in your pilot test:***

- 1.** Pilot test the instruments and collection methods. Try to mimic the conditions you expect to encounter when you collect data for your performance measures later.
- 2.** Get feedback from data sources (e.g. pilot interviewees). Did they understand the instrument/questions and the process?
- 3.** Analyze data collected during the pilot test to ensure you are getting the information you need to respond to your anticipated performance measurement targets.
- 4.** Hold a feedback session with data collectors to discuss any challenges. Determine solutions to challenges that arose. Do data collectors need more training? Does the instrument need revisions? Will the method be feasible when you need to collect larger set of data?

If the pilot test indicates that changes need to be made to data collection approaches or instruments, these should be made prior to actual data collection. If changes are drastic, another pilot test of instruments and/or another practice session with data collectors may be appropriate. Training issues may also arise, requiring additional training for data collectors in instrument/method use.

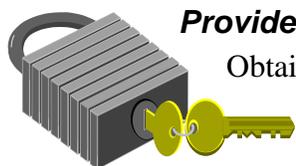
## Step 6

### ***Implement Your Data Collection***

You have spent a lot of time planning for your data collection. It is important that your data collectors and others involved are aware of the data collection schedule as well as their deadlines for collecting and returning data back to you. One issue you will need to consider during your planning, and especially during your data collection, is the willingness of respondents to participate (complete surveys, focus groups, etc.). The following are some additional tips to remember while you plan for your data collection.

### ***Take Steps to Ensure that You Get Enough Information***

- Keep instruments short, one or two pages if possible.
- Provide directions on how to return the survey.
- Provide a self-addressed, stamped envelope if budget permits.
- Let people know how you will use the data to make their lives better. Always find a way to report the information back to the participants. This will not only improve their cooperation, but may improve your data (e.g., getting feedback on observations and other qualitative data to validate quantitative results).
- Offer incentives like money, free food samples, or coupons, if appropriate.
- When possible, use a captive audience (e.g., classes, waiting rooms, people in offices, or people who need a service).
- Sometimes changing methods of collecting data will help improve response rates. For example, mailed surveys usually have lower response rates than phone surveys or in-person surveys and interviews.



### ***Provide Confidentiality***

Obtaining data from respondents can be difficult if they are concerned that the data will be shared with others or that they will be identified in a report. It is always important to consider the potential impact of collecting and providing data on the respondent. This is especially important when respondents are providing information that is sensitive or may have personal or legal implications (e.g., surveys on drug use or child abuse, school grades, or opinions about teachers, mentors, program staff).

- Always inform respondents about your confidentiality guidelines when you begin data collection. These guidelines can be included in the directions or cover letter for a survey, or in the permission letters distributed before existing or interview data are collected.
- Always provide the confidentiality you promise.
- Make surveys anonymous; if you need to collect pre-post data, have respondents use code numbers or names.
- When reporting results collected from interviews, focus groups, or observations, assign fictitious names to respondents or summarize answers by categories rather than by respondent.
- When collecting grades, discipline records, or other existing data, it may be useful to assign each student a code for reporting purposes, or to report data in aggregate form.

### **Identify the Quantity or Dosage of Service**

When appropriate, make sure your data collection processes contain a system for separating individuals who received a lot of service from those who received little or none. This means that it will be important to keep track of program attendance through sign-in sheets or attendance logs. For anonymous instruments, it may help to ask questions such as “how often did you attend the drop-in counseling sessions?” or “how many times did you meet with your mentor?”

### **Use Low Burden Methods**

Data collection should not be a burden: plan to integrate it with service provision when you can. Some instruments, such as goal-setting logs and journals, may be implemented as part of the activity provided by the programs. For example, goal setting can serve both to plan tutoring sessions and to measure their impact. Journals can act as a forum for learning writing skills, as well as a demonstration of change in skills and attitudes. Similarly, in an immunization program, child immunization cards can serve as a data collection instrument and an educational tool as well as an appointment reminder system for parents.

### **A Complete Data Collection Plan might look like the following:**

<b>Data Type/ Method</b>	<b>Data Collectors</b>	<b>Data Source</b>	<b>Others Involved/ Contact and Dates</b>	<b>Training Needs</b>	<b>Training Dates</b>	<b>Data Collection Dates</b>	<b>Additional Issues</b>
<i>Immunization data</i>	<i>National service participants</i>	<i>Immunization records</i>	<i>Health center director (9/1); Nurses (9/15); Parents (10/1-11/15)</i>	<i>Immunization schedule; Reading records; completing immunized child tally sheets</i>	<i>10/15-17</i>	<i>Baseline: 11/16-28  Post-service: 8/20-31 of next year</i>	<i>Must get signed information release forms from parents.</i>



### **It's Your Turn**

Turn to page 11 and finish the “Data Collection Plan” for your national service program. Add important dates and any additional issues to keep in mind.



## Data Collection Plan



Data You Need		
Data Type/ Method		
Data Source		
Data Collectors (include type of involvement)		
Others Involved (include type of involvement)		
Contact Dates		
Training Needs		
Training Dates		
Data Collection Dates		
Additional Issues		