



Tool: Guidelines for designing data collection tools

Organisations often get stuck when trying to convert a Monitoring, Evaluation and Learning plan into a data collection tool. The framework below provides guidelines for developing data collection tools, regardless of the type of data collection method (qualitative or quantitative) selected.

Data collection tools should include the following:

Instructions to data collectors

- Provide general instructions to data collectors upfront. These should include guidelines about what interviewers should do before, during and after the data collection session.

Demographics

- Include demographic questions related to variables considered important for data analysis (such as gender, age, geographic location, organisation, etc.)

Introduction and ethics

- Clarify the purpose of the interview/focus group discussion, how data will be used and shared, the affiliation of the researcher/evaluator, and issues related to anonymity and confidentiality.
- Building a rapport is important! The introduction provides the data collector with an opportunity to do this.

Structure and flow

- Start with more general, factual questions to create a sense of comfort.
- More sensitive questions should be dealt with later in the data collection process, to allow for sufficient time to establish a rapport.

Use of sub-headings

- Use sub-headings to help segment the instrument and to make navigation easier for the data collector.
- Consider using the key evaluation criteria/questions/results framework as section headings and sub-headings.

Ending the interview

- Always provide an opportunity for the respondent to add anything that has not been covered during the discussion, and to ask the data collector any questions they may have.
- Check in to see how the respondent is feeling (particularly if the content discussed is sensitive) and offer debriefing/counselling support if necessary.