BSCC CalVIP Technical Assistance Workshop Series

RDA CONSULTING

Workshop 2. Best Practices in Data Collection, Administration, & Entry–Part II

October 19, 2023

Please Note…

- This workshop is being recorded & will be posted on BSCC's website once it becomes available

Zoom Etiquette

Remain on camera (when possible)	**Mute** when you are not talking	Stay **present** & **engaged; eliminate distractions**
Keep chat conversations **appropriate** & **on topic**	Make sure your **full name** is displayed	If you have a question, **raise your hand** using the Zoom function at the bottom of your screen, or **use the chat feature**

Agenda

- Introductions
- Project background
- Purpose of today's workshop
- Questions to consider to select the best data collection methods & sources
- Data collection methods & sources & best practices for using them
- Advantages & disadvantages of common data collection methods & sources
- Breakout activities
- Closing

Introductions

RDA Introductions

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Introductions

- Now we'd like to get to know you better!
  - Please select the position that best describes your role in your program

Community Agreements

- Be present at start of workshop
- Actively participate
- Keep statements respectful, constructive, & relevant to workshop topic
- Be brief & mindful of everyone's time when sharing
- Respect others' thoughts & feelings when they differ from yours

Project Background

Project Goal

- To provide regional technical assistance (TA) for CalVIP Cohort 4 grantees to help build capacity in:
  - Data collection
  - Data entry
  - The development of data-sharing agreements

Project Objectives

- Conduct grantee discovery
  - Review relevant documents (e.g., grantee proposals, LEPs, QPR-Baseline Reports)
  - Administer TA Interest Survey
- Refine TA delivery plan
- Deliver TA
  - Targeted TA
  - Group-based TA workshops
  - Ongoing TA as requested

BSCC CalVIP Data Collection Requirements

- Quarterly progress report data
  - Enrollments & service outputs
    - Enrollment quarterly totals
    - Participation in services
    - Project service outcomes
  - Exits & participant outcomes
    - Exiting participants
    - Outcomes
- Local Evaluation Report data
  - Quantitative & qualitative data to answer your project's process & outcome evaluation questions

Workshop Purpose

Workshop #1 Recap

- In Part 1 of this workshop topic, we discussed…
    - The difference between process & outcome evaluation questions
    - Quantitative vs qualitative data
    - Strategies to evaluate the quality of your data
    - Data collection strategies to address your evaluation questions

Workshop #2 Goal

- To help plan for the evaluation of your CalVIP Cohort 4 program by focusing best practices in developing data collection instruments & the creation of quality instruments to meet data collection needs
- To share best practices & resources to allow for grantee-to-grantee learning

Workshop #2 Objectives

1. Consider several questions to select the best data collection methods & sources
2. Understand the purpose of different data collection methods & sources & best practices for using them
3. Describe the advantages & disadvantages of common data collection methods & sources

Workshop #2 Objectives (Continued)

- We will focus on four common data collection methods throughout the workshop:
  1. Existing data, documents, & other records
  2. Interviews & focus groups
  3. Observations
  4. Surveys

What are you hoping to take away from today's workshop?

Questions to Consider to Select the Best Data Collection Methods & Sources

Key Questions to Consider

1. What is the purpose of the evaluation?
2. What are the evaluation questions you need to answer?
3. What is the evaluation design?
4. What resources are available to conduct your evaluation?

What is the Purpose of the Evaluation?

- The purpose of the evaluation helps determine why the evaluation is being conducted
  - Establishes expectations & narrows focus
- Who are the stakeholders & what do they want to know?
  - Drive your evaluation
  - Help you determine the evaluation purpose
  - Help you better understand why evaluation is being conducted, who needs the information, & how findings will be used

What are the Evaluation Questions you Need to Answer?

- Evaluation questions:
  - Encourage stakeholders to clarify what things the evaluation should address
  - Narrow evaluation focus by stating what aspects of the program will be further explored
  - Help determine the most suitable evaluation design & the best data collection method(s)
  - Reveal evaluation's focus on program processes &/or outcomes

What is the Evaluation Design?

Evaluation questions for process & outcome evaluations

Process evaluation	Who? Where? What? Why? When? How?	Includes quantitative & qualitative data collection
Outcome evaluation	Changes? Effects? Impacts?	Includes quantitative & qualitative data collection

What Resources are Available to Conduct your Evaluation?

- Key questions:
    - What data are you already collecting or have access to?
    - How much of your evaluation budget can be allocated to data collection?
    - How much staff time can be devoted to data collection?
        - What are staff members' areas of expertise?

Data Collection Methods & Sources & Best Practices for Using Them

Existing Data, Documents, & Other Records

Purpose

- A way of collecting data by reviewing existing data, documents, & records
- Information may be:
  - Internal (e.g., attendance records, staff meeting meetings) or external (e.g., data gathered by government agencies, schools, police, hospitals) to a program
  - Hard copy or electronic form

Uses

- To gather background information
- To determine if implementation of the program reflects program plans
- When you need information to help develop other data collection tools
- When you need data to answer evaluation questions regarding what & how many

Steps in Conducting Document/Record Reviews

1. Assess existing documents/records
2. Secure access to the documents/records identified via assessment
3. Ensure confidentiality
4. Compile documents/records relevant to the evaluation
5. Understand how & why the documents/records were produced
6. Determine the accuracy of the documents/records
7. Summarize the information from the documents/records reviewed

Participant Questions

1. What internal existing data do you/could you use to support your evaluation?
2. What external existing data do you/could you use to support your evaluation?
3. What are some other examples of data your program already collects that could help you answer your research question(s)?

Interviews & Focus Groups

Purpose

- Directly ask an individual (in an interview) or multiple participants (in a focus group) questions to collect data to answer an evaluation question(s)

Uses

- To obtain information about thoughts & behaviors
- To explore new issues or generate ideas
- To identify & define problems
- To identify new or assess existing solutions
- To pretest or refine questions for surveys
- To provide context for quantitative data

Steps in Conducting Interviews & Focus Groups

1. Identify evaluation questions to be answered through the interview or focus group
2. Determine your audience & develop questions
3. Develop a protocol
4. Develop a template or data collection form
5. Identify participants
6. Identify & train interviewers & facilitators
7. Conduct your interviews or focus groups

Participant Questions

1. What concepts would you like to explore through interviews &/or focus groups with program participants?

Observations

Purpose

- Watch & document key aspects of service delivery in real-life settings for data collection to help understand the program, services, & its impact

Uses

- To collect information about processes or situations
- To study interactions & behaviors
- To describe a physical environment
- To record characteristics of individuals & groups, or measure fidelity

Steps in Conducting Observations

1. Identify evaluation questions to be answered through observations
2. Identify what you would like to observe
3. Choose an approach to collect the data /choose controlled or natural observations
4. Determine timing & select an observation site(s)
5. Develop a protocol
6. Identify & train observers
7. Conduct your observations

Participant Questions

1. Does your organization conduct observations as a component of measuring program impact or fidelity?
2. For those who have used surveys, what has your experience been using this method? Or, what evaluation question(s) were you hoping to answer by conducting surveys?

Surveys

Purpose

- To collect information directly from individuals through a standardized set of questions

Uses

- When you need data from many people
- To gather client feedback or data about knowledge, beliefs, attitudes, & behaviors
- When you need demographic information from clients
- When it is important to protect the privacy of participants

Steps in Conducting Surveys

1. Identify evaluation questions to be answered through the survey
2. Determine what you are measuring
3. Decide on open-ended or close-ended questions
4. Determine the response scales & number of response options for close-ended questions
5. Ensure the language is clear, culturally relevant, & developmentally appropriate

Steps in Conducting Surveys (continued)

6. Make the survey readable
7. Decide on the order of survey questions
8. Share important information with respondents
9. Select a mode for administering the survey
10. Pilot test & conduct the survey

Participant Questions

1. Does your organization use surveys to gather information from participants?
2. For those who have used observations, what has your experience been using this method? Or, what evaluation question(s) were you hoping to answer by using observations?

Advantages & Disadvantages of Common Data Collection Methods & Sources

Data Collection Instruments: Advantages & Disadvantages

Method	Advantages	Disadvantages
Existing data, documents, & other records	• Can be cost-effective because data are often collected by the program & therefore already exist • Can add additional contextual information to program outcomes (e.g., backgrounds of participants who achieve expected outcomes)	• A data request may be needed to obtain information • Data entry errors may decrease accuracy • Data may be incomplete • Data collection process is out of the control of the evaluation team
Interviews	• Can be used to explore new ideas or issues • Follow-up questions can be used to obtain more detail about responses when needed • Follow-up probes can be used to determine how interviewees are interpreting questions • Nonverbal communication during in-person interviews aids in response interpretation • Interviewees might be more comfortable in a one-on-one setting	• Time-consuming to conduct • Time-consuming to analyze data • Limited number of participants • May require individuals outside of direct program staff to conduct

Data Collection Instruments: Advantages & Disadvantages

Method	Advantages	Disadvantages
Focus groups	• Can be used to explore new ideas or issues • Follow-up questions can be used to obtain more detail when needed • Follow-up questions can be used to determine how participants are interpreting questions • Participants can build on one another's responses • Often more cost-effective than interviews • Nonverbal communication during in-person focus groups can aid in response interpretation	• Group setting may inhibit participants from speaking freely • Difficult to coordinate schedules with multiple people • Participants may focus on one topic, limiting exploration of other ideas • Requires a skilled facilitator(s) • Time-consuming to analyze data

Data Collection Instruments: Advantages & Disadvantages

Method	Advantages	Disadvantages
Observations	• Provide a sense of the implementation of a program • Allow the evaluation team to gain an understanding of the environment of participants • Help to provide a context for interpreting data • Help to monitor fidelity	• Provide a sense of the implementation of a program • Allow the evaluation team to gain an understanding of the environment of participants • Help to provide a context for interpreting data • Sometimes need multiple observations to gain a realistic sense of a program • Time-consuming to observe, & thus can be expensive • Time-consuming to analyze data • Participant behavior may be affected by the presence of an observer
Surveys	• Can be used to quickly collect information from lots of individuals • If conducted in person, response rates can be high • Electronic or online surveys can save time & costs with data entry, & they can improve data quality by reducing data entry errors	• Cannot ask additional probing questions • Response rates of mail & electronic surveys can be low • If questions are confusing or unclear, resulting data may be unusable

Program Breakout Activity

Program Breakout Activity

1. Select your program from the list of breakout rooms
2. Pick one of the four data collection sources you are not already using at your program & brainstorm how to implement it at your program
3. Based on your logic model & evaluation questions, what data should you collect using that method/source?
4. What type of data collection method or source are you currently using but would like to improve the use of?

Methods & Sources Breakout Activity

Methods & Sources Breakout Activity

1. Choose a breakout room based on the strategy you selected in the previous Program Breakout Activity
2. Goal = To learn from each other & get ideas about how other programs are using your selected method/source

Methods & Sources Breakout Activity (continued)

- Prompting questions for the activity:
    1. What evaluation question(s) would you hope to answer with this method or source?
    2. If you have used this method or source before, what strategies have worked well?
    3. What barriers or challenges have you encountered or do you anticipate encountering when implementing this method or source?
    4. How could these barriers or challenges be addressed or avoided?

Closing

Upcoming BSCC CalVIP TA Workshop Topics & Dates	
Title	**Date**
~~1. Using best practices in data collection, administration, & entry-Part I~~	~~Sept.13, 10:00 am - 12:00 pm PST~~
~~2. Using best practices in data collection, administration, & entry-Part II~~	~~Oct. 19, 11:00 am - 1:00 pm PST~~
3. Measuring client progress through outcome data	Dec. 6, 10:00 am - 12:00 pm PST
4. Streamlining & managing data collection processes-Part I	Jan. 31, 10:00 am - 12:00 pm PST
5. Streamlining & managing data collection processes-Part II	Feb. 28, 11:30 am - 1:30 pm PST
6. Monitoring data collection & establishing CQI processes	April 3, 10:00 am - 12:00 pm PST
7. Using secondary data to support BSCC-Part I	April 24, 11:30 am - 1:30 pm PST
8. Using secondary data to support BSCC-Part II	May 23, 11:00 am - 1:00 pm PST

Ongoing TA as requested

Two ways to request TA support from RDA!

1. Via the RDA TA Request Portal—Use your phone to scan the TA Interest Form QR code

or

2. Email RDA_TA@RDAconsulting.com
    - Provide your name, agency & program name, & a brief description of your TA needs

TA Interest Form

We want to hear from you!

BSCC CalVIP TA Workshop 2 Feedback Form

survey.alchemer.com

Help us improve future BSCC CalVIP TA workshops!

Use your phone to scan the QR code or click on the link in the chat to provide feedback on today's session

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Thank you!