

Handout: Data Collection Tools and Techniques¹

Case study: A detailed descriptive narrative of individuals, communities, organizations, events, program, or time periods. They are particularly useful in evaluating complex situations and exploring qualitative impact.

Checklist: A list of items used for validating or inspecting that procedures/steps have been followed, or the presence of examined behaviours.

Closed-ended (structured) interview: A technique for interviewing that uses carefully organized questions that only allow a limited range of answers, such as "yes/no," or expressed by a rating/number on a scale. Replies can easily be numerically coded for statistical analysis.

Community interviews/meeting: A form of public meeting open to all community members. Interaction is between the participants and the interviewer, who presides over the meeting and asks questions following a prepared interview guide.

Direct observation: A record of what observers see and hear at a specified site, using a detailed observation form. Observation may be of physical surroundings, activities, or processes. Observation is a good technique for collecting data on behavior patterns and physical conditions.

Focus group discussion: Focused discussion with a small group (usually 8 to 12 people) of participants to record attitudes, perceptions, and beliefs pertinent to the issues being examined. A moderator introduces the topic and uses a prepared interview guide to lead the discussion and elicit discussion, opinions, and reactions.

Key informant interview: An interview with a person having special information about a particular topic. These interviews are generally conducted in an open-ended or semi-structured fashion.

Laboratory testing: Precise measurement of specific objective phenomenon, for example, infant weight or water quality test.

Mini-survey: Data collected from interviews with 25 to 50 individuals, usually selected using non-probability sampling techniques. Structured questionnaires with a limited number of closed-ended questions are used to generate quantitative data that can be collected and analyzed quickly.

Most significant change (MSC): A participatory monitoring technique based on stories about important or significant changes, rather than indicators. They give a rich picture of the impact of development work and provide the basis for dialogue over key objectives and the value of development programs.

Open-ended (semi-structured) interview: A technique for questioning that allows the interviewer to probe and follow up topics of interest in depth (rather than just "yes/no" questions).

¹ This list is not exhaustive, as tools and techniques are emerging and evolving in the M&E field.

Participant observation: A technique first used by anthropologists; it requires the researcher to spend considerable time with the group being studied (days) and to interact with them as a participant in their community. This method gathers insights that might otherwise be overlooked, but is time-consuming.

Participatory rapid (or rural) appraisal (PRA): This uses community engagement techniques to understand community views on a particular issue. It is usually done quickly and intensively – over a 2 to 3-week period. Methods include interviews, focus groups, and community mapping.

Questionnaire: A data collection instrument containing a set of questions organized in a systematic way, as well as a set of instructions to the enumerator/interviewer about how to ask the questions (typically used in a survey).

Rapid appraisal (or assessment): A quick cost-effective technique to gather data systematically for decision-making, using qualitative and quantitative methods, such as site visits, observations, and sample surveys. This technique shares many of the characteristics of participatory appraisal (such as triangulation and multi-disciplinary teams) and recognizes that indigenous knowledge is a critical consideration for decision-making.

Self-administered survey: Written surveys completed by the respondent, either in a group setting or in a separate location. Respondents must be literate (for example, it can be used to survey teacher opinions).

Statistical data review: A review of population censuses, research studies, and other sources of statistical data.

Survey: Systematic collection of information from a defined population, usually by means of interviews or questionnaires administered to a sample of units in the population (e.g., person, beneficiaries, and adults).

Visual techniques: Participants develop maps, diagrams, calendars, timelines, and other visual displays to examine the study topics. Participants can be prompted to construct visual responses to questions posed by the interviewers, for example, by constructing a map of their local area. This technique is especially effective where verbal methods can be problematic due to low literate or mixed language target populations, or in situations where the desired information is not easily expressed in either words or numbers.

Written document review: A review of documents (secondary data) such as project records and reports, administrative databases, training materials, correspondence, legislation, and policy documents.