### Surveys and Questionnaires

**Online or paper-and-pencil**

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| ***Surveys and Questionnaires*** | |
| **PROSCheckmark** | * Can be wide-reaching (collect data from large numbers). * Cost effective method relative to others. * Easily offers participant anonymity. * Can collect both quantitative and qualitative data. * Best for collecting baseline data. * Electronic platforms facilitate easy data organization, cleaning, and analysis preparation. |
| **CONS**  **Close** | * Getting the desired response rate can be difficult with electronic surveying because it is a low-touch method. Paper-and-pencil surveys are more time and resource consuming, but get higher response rates because they are administered in person. * Varying literacy and language skills may affect stakeholder access and ease of survey completion. * Completion rates correspond to survey length and quality of construction (e.g. number of items, item clarity, sequence and logic of items, etc.) |
| **HeartPARTICIPANTS**  **Group brainstorm** | * Carefully consider who authors and distributes the survey, especially for issues of cultural relevance. * Use native or home language and terms as appropriate for cultural relevance. * If possible, pilot the survey with a small/sample stakeholder group prior to distribution. * Explain what you will do with the survey results and how it will benefit participants/group/community. |
| **TIPS**  **Lightbulb and gear** | * Ensure items are aligned to project outcomes and indicators. * Write reliable and valid survey items (e.g., they should ask/query one thing, use clear and concise language, do not lead respondents to answer in a particular way). * Keep introductions concise and reduce technical jargon. Spell out acronyms. * When appropriate, feature higher effort items upfront and lower effort items towards the end (e.g., feature open response items before demographics items). * Plan and coordinate survey distribution thoughtfully to reduce participant fatigue (e.g., leverage events already happening or distribute the survey so it does not coincide with similar surveying efforts; this may require coordinating with other organizations). * Surveys can be used to recruit focus group volunteers (“if you are interested in participating in a focus group, please share your contact info…”). |

### Interviews

**Group and individual interviews**

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| ***Focus Groups/Group Interviews*** | |
| **PROSCheckmark** | * More personable data collection method. * Facilitates probing to understand participant reasoning, motivations, and actions (the “why” and “how”). * Opportunity for participants to feel heard; can facilitate relationship-building and trust between researcher and participant. * Opportunity to gather more robust and “deeper” data for analysis. |
| **CONS**  **Close** | * Generally requires greater time and resources to gather information than survey distribution (i.e., more human resources). * Qualitative analysis can be time consuming and requires skills/strengths in literacy, writing and critical reflexivity (e.g., to construct conceptual frameworks, identify significant themes). * Anonymity must be agreed upon and upheld by participants in group setting. |
| **HeartPARTICIPANTS**  **Group brainstorm** | * Carefully select facilitator; someone technically qualified with an understanding of or place in the community is ideal. * Explain what you will do with participants’ feedback and how it will benefit them. * Use native language and terms as appropriate in the protocol and conversation. * Allow ample time for introductions and storytelling. * Keep group interviews small to facilitate meaningful sharing. * Contextualize/nest protocol questions in the context of community or use community examples to illustrate the relevance of the questions. |
| **TIPS**  **Lightbulb and gear** | * Keep introductions concise and reduce technical terms/jargon. * Use focus groups to sample a population for more in-depth information. It is not a method for broad data collection. * Get participant consent, which ensures they understand the purpose of the focus group and any associated risks or rewards. * Keep group sizes small so they are manageable (e.g., 4-6 people). * Choose comfortable facilities if possible (e.g. lighting, temperature, seating, restroom access). Environment affects experience. * Budget ample time for interviews, especially when allowing for personal sharing and storytelling. * Keep protocols short; 3-5 major questions. Use probes if more detail is needed. * For group interviews, consider a meaningful icebreaker beyond “what is your name and where do you work?”. Other Possibilities: “Why are you here?”; “Share a meaningful memory or experience about this community or place”; “What is your hope for this community”, “Share something about yourself you’d like others to know”, etc. * Avoid questions with overlap that force participants to repeat themselves. * Be conscious of group composition, such as age and gender, and how this might affect dynamics (e.g., feeling safe or entitled to share). * In group settings, the facilitator should be fully engaged. This may mean audio recording the session for note taking purposes, or having another person in the room to take notes. * Follow-up afterwards with a thank you email or letter. |

**Observations**

**In-person and virtual; classroom, demonstration activities, events and artifacts**

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| ***Observation*** | |
| **PROSCheckmark** | * Good for measuring skills gains. * Collects data in context. * Potential access to diverse stakeholder groups. * Observation as a method aligns well to Native/Indigenous values in research, teaching, and learning. * Who/what is observed can be varied – classrooms, outdoor activities, and everyday events; artifacts (e.g. work portfolios, arts projects, essays); digital products (e.g. observation of a video of an event; online posts). * Rubrics developed to “score” observations can be highly tailored and adaptable. |
| **CONS**  **Close** | * High dependency on observer for scoring. * More resource intensive than surveys or interviews. Requires the development of a rubric for each category of observation and some level of training or norming for the observer(s). Time consuming. |
| **HeartPARTICIPANTS**  **Group brainstorm** | * When appropriate, collect community or stakeholder input on observation dimensions or opportunities (e.g., this could be asked in a needs assessment or information sharing forum). * Explain how observations will be used and how the results will benefit participants/group/community. |
| **TIPS**  **Lightbulb and gear** | * Like focus groups, observations should only be used to collect sample data. It is not a method for broad data collection. * Create clear and concise scoring criteria and associated definitions. The wordier and longer the definitions, the harder they are to observe and score. * Rubrics can be maximized by creating a scoring system for immediate observation, with a notes section for the observer to offer additional insights tied to those scores. * Rubrics can be designed to score “what” stakeholders do, “how often” they do it, and the “quality” with which they do it. * Observers should ‘norm’ in training/skills-checks sessions to ensure that criteria and methods are deployed as consistently as possible (e.g., what is the difference between “high engagement”, “moderate engagement” and “low engagement”?) |

**Assessments**

**Standardized tests and pre/posttests**

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| ***Assessments*** | |
| **PROS**  **Checkmark** | * Good for collecting benchmarks. * Can be distributed to an entire group (e.g., class, cohort, grade-level). * Can be easily scored and data analyzed using statistical procedures (i.e., cost-effective). * Standardized assessments: Already be vetted for reliability and validity. * Standardized assessments: Built-in distribution timeline and participants/respondents (i.e., may be logistically easier to administer). * Pre/posttests: Good for measuring changes in knowledge/knowledge gains. |
| **CONS**  **Close** | * Pre/posttests: Work best with highly structured and disciplined projects or curriculum (i.e., may be difficult to determine what about the project added value to explain participant gains). * Pre/posttests: Not as good at measuring changes in values or skills * Standardized assessments: Cannot be tailored to specific project needs; may offer limited data or data with limited relevance. * Standardized assessments: May measure assessment taking ability vs. content knowledge. * Standardized assessments: May be biased against non-dominant or disadvantaged groups. |
| **HeartPARTICIPANTS**  **Group brainstorm** | * Explain what you will do with the assessment data collected. * Emphasize data will be kept strictly confidential and will be reported in aggregate. * Measure only relevant components. * Make every effort to consider equity and develop culturally appropriate assessments. * Participation should be voluntary. |
| **TIPS**  **Lightbulb and gear** | * Standardized assessments: Triangulation with other data sources may be necessary if the assessment data is limited. * Standardized assessments: Perform a crosswalk of the assessment items to project outcomes and indicators; identify what within the assessment is directly relevant to your measurement goals to determine its usefulness and data collection purpose. * Pre/posttests: Allow enough time between first and second administration so that the intervention has the chance to work (so the desired change in participants can occur). |

### Extant Data

**Official records, reports, and statistics; existing survey or assessment data; online user data and analytics**

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| ***Assessments*** | |
| **PROSCheckmark** | * Extant data are data that already exist. * Can be easily accessed (i.e., publicly available data). * Can be cost effective and relatively low effort (e.g., document review, internet and database searching). * Can save on community goodwill (i.e., reduce participation fatigue). |
| **CONS**  **Close** | * Sometimes, data sharing agreements or MOUs with other organizations may be necessary to access the needed data; these processes can take time and run into bureaucratic roadblocks. * Data may be limited in their usefulness because they were not collected for the specifics of your project. * Data quality can be questionable (especially if retrieved from an open data source or data not accountable to a review process). |
| **TIPS**  **Lightbulb and gear** | * In evaluation, extant data review is usually a supplemental data collection method (not a primary method). * Develop a protocol to code and organize extant data by topic, theme, grain size, and/or other relevant criteria. * If available, use digital files to reduce costs and clutter. |