### 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.
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| **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.)
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| **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.
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| **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…”).
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### 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.
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| **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.
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| **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.
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| **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.
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**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.
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| **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.
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| **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.
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| **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”?)
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**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.
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| **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.
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| **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.
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| **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).
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### 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).
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| **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).
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| **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.
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