ORGANIZING A FIELD DATA COLLECTION RUN

Going into the field to gather data is a standard facet of research. While each project will have unique factors that impact on how the field run will occur, there are some standard factors that you need to consider when preparing to gather data.

Selecting the Team:
Several weeks prior to the data run, the data collection team must be selected, notified, and travel arrangements made. While there are a number of factors to consider when selecting the research team, there are three major considerations; when organizing a team it is important to consider the **skills needed** (i.e. you may need someone who can type quickly), the **time frame** (i.e. some projects require attending night meetings that finish at 10:00 pm), and **transportation issues** (i.e. rush hour patterns, vehicle availability). Team members must be able to work together amicably and their skill sets should be complementary. Staff should have input on which team they would like to work with whenever possible (although it is not always reasonable to accommodate all requests). Each data collection group should have an assigned "group leader" or "car captain" (see Tip 4 under the next section). Given last minute issues that may occur, it is a good idea to have a back-up person selected.

Plan in Advance:
The key to a productive field trip is to be well organized and to have a well-trained data collection team. To accomplish this you make plans well in advance of the data run. First, meet with your supervisor to review the tasks and data collection needs. Then, consult the data collection instructions for your project (if it is an ongoing project and you have assumed responsibility from a prior staff member). If any questions arise, consult with the PI immediately. Then, review the following items that present some generic tips.

1. Develop site lists if you will be visiting multiple locations. When developing the site/ subject list it is important to divide locations evenly with reference to the time anticipated to get to and conduct the data gathering. For example, if the data collection run requires that the team visit many sites, keep the data collection teams in one geographic area so that the data collection is as efficient as possible. Your team members will get frustrated if they are driving back and forth to different areas.

2. Develop clear driving instructions and directions from campus or other start points (i.e. Riverside) to the site. The directions can be created using websites (i.e. randmcnally.com and mapquest.com) and/or the Thomas Bros. Guide. Place these instructions in a binder with a complete list of all sites and include extra information that might help; such as possible range problems or a difference in directions, and add it to the packet (see Figure 1).

3. Compile packets for each data collection team. Suggestions for what to include in packets include:

- Complete list of home/cell telephone numbers for each person involved in the data run and the project managers/ principal investigators,

- Data collection instruments for each subject (i.e. interview consent forms, surveys, debriefing forms) and a number of extras just in case,
- A list of sites or subjects to be surveyed with their contact information,
- Maps to each study site, meeting places, and/or hotels, and
- Hotel reservations and contact information.

Figure 1. Additional info sheet

ID	Address	City	Map Page#	North Latitude	West Longitude	Disks or Photo No.s	Additional Info

Team: ___________ Date: ___________
Area: ___________ Names: _________

4. A leader (also referred to as a "group leader" or "car captain") for each data collection group must be selected. Usually, this is the person in each group that has the most experience with doing field research. A meeting should occur with all group leaders a few days before the general data collection meeting (described in tip 5). At this orientation meeting, the group leaders must be provided with a sample of the completed package of materials so that they can be given an opportunity to go through the materials to check for clarity of instructions. Critical or problematic locations/ sites/ subjects should be noted. The most experienced staff should be assigned these challenging places/people.

5. Once a team is selected, they must be: trained on the use of data collection instruments and procedures (approximately 1 week prior to going into the field), and given an opportunity to do a pilot (approximately 1 week prior to the trip). This is usually done with a large group meeting and during the meeting a sample case is discussed. It is important to brainstorm all the possible things that could go wrong to develop contingency plans in addition to reviewing the packages. See the next section for additional tips about this meeting.

Pre-Data Run Briefing:
Schedule a pre-data run briefing within 1 week of the first scheduled data collection trip (if there are many trips you may have to have follow-up meetings to brief new staff). It is critical that all persons working on the data run are present for this meeting. Normally the project manager/principal investigator runs this meeting. Assemble all equipment that

will be used so you can demonstrate how to do things (i.e. demonstrate how to work the GPS).

Assume that those assisting are not familiar with the project and will need a comprehensive briefing on the, nature of the project, purpose of the data collection run, the specifics of the instruments, and details about how the data will be analyzed. Explain each item in the data collection instruments. Be sure to explain all coding and items that may appear commonsense. Be open to questions and never assume that the staff already understands.

Reiterate the importance of providing an answer to each item; missing data, does not apply, and will get the data later codes must be explained. Suggest to the staff that each instrument must be reviewed for completion (and handwriting legibility where appropriate) immediately after the interview or site visit (this may occur at the end of the day).

Remind everyone to keep receipts and document mileage. Reiterate Foundation policies on travel and reimbursement.

<u>Packet Requirements for the Run:</u>
Assemble all equipment needed; this includes copies of all instruments. Develop packages for each car and deliver the materials to the car captains. Be sure to include:

- Extra batteries and film
- Extra pens
- Extra instruments (i.e. surveys)
- Clipboards/Binders
- Maps (and telephone books if necessary)
- Contact lists
- Hotel information
- Subject list
- Driving instructions to the site
- GPS units

<u>Day of the Data Run:</u>
When necessary (for example, on the first execution of a new data run procedure) have all team members meet to review any changes in plans, answer questions or pass out information on the morning of the run. Again, reiterate the importance of completing the surveys in their entirety and reviewing them for obvious error prior to finishing the run. Remind everyone to keep receipts and document mileage. Check on the status of teams throughout the day (either by scheduling a meeting half way through the day or calling the car captains at regular intervals). Collect all completed instruments at the end of the day and check for completeness immediately. Give back items that are incomplete ASAP so the team can sort it out prior to leaving the field if possible.

It is most important to remain flexible, patient, and open for unexpected changes that most likely will occur on the data run. Project manager/principal investigators must stay in close contact with the field staff.

<u>Post-Data Run Briefing:</u>
Following the data collection it is important to meet with all staff that participated in order to gather feed back on procedures that could be improved in the future; procedures that went well and should be repeated, problems that arose, data coding issues and concerns, other general personnel issues (issues of safety), and how to resolve the issues. This meeting should be scheduled fairly soon after the completion of the data collection so that issues are not forgotten. Again, the project manager/ principal investigator typically runs this meeting.