



Fund for Innovation  
and Transformation

Fonds pour l'innovation  
et la transformation

# 10 Tips & Tricks for Baseline Data Collection

**Baseline data** provides information about the existing conditions in the testing environment before you introduce your innovation. This makes it possible to measure progress towards indicators and outcomes, and assess the impact of your innovation!

## Ready to start planning and collecting your data?

Whether you're heading into the field or picking up the phone, here are some quick tips and tricks to keep in mind when collecting baseline data. If you're a FIT-funded SMO, use these tips to complement the provided guidelines.

*See Next Page for Tips and Tricks*

## Collecting Data in Covid-19

In the Covid-19 era, you might not be able to collect data face-to-face. Check out these resources on collecting baseline data remotely.

[Data collection and COVID-19: insights on phone surveys](#) provides tips on how to conduct effective phone surveys and whether they're right for your research project.

ODI's [Tips for collecting primary data in a Covid-19 era](#) is a great toolkit for planning remote research and testing in the current moment.

### Learn more:

Spur Change's [Micro-Learning Sessions: Baseline Survey](#) provide guidance on qualitative and quantitative methods, gender-sensitive approaches and ethics in the data collection process.

Watch these short presentations by FIT-funded SMOs [Change for Children Association](#) and [Embrace International Foundation](#) on collecting baseline data – including how they adapted and improved!



## 1. Choose your methods wisely:

- o Surveys and skills tests work better for **quantitative** data, and interviews, focus group discussions and observation are best for **qualitative** indicators.
- o Pick an appropriate **sampling strategy** (i.e. random sampling, stratified sampling, snowball sampling etc.) and sample size (many factors should be considered, but one common standard is 10 people per outcome level indicator!)
- o Find the balance between **primary and secondary data** – What needs to be captured directly from the field? Does previously collected, relevant data exist?

**2. Triangulate!** Use a mixed methods approach (quantitative, qualitative, primary and secondary data) to capture more accurate data.

**3. Craft your questions:** Avoid leading questions - this could skew your data. Keep questions simple and focused. Avoid long questionnaires – think about capturing info through other tools (such as interviews, focus groups etc.)

**4. Test your tools:** Always pilot your collection tools with a small sample and then make any necessary tweaks to language, approach or even indicators.

**5. Think about format:** Paper, phone or online survey? Consider the needs and abilities of your beneficiaries, and your own capacity to gather, manage and analyze.

**6. Consent is key:** Get informed consent from beneficiaries before they participate! Consider power dynamics and risks, and make opting out available. Clearly explain your innovation, who you are and how you'll be using their data. Ethics and transparency are key in a testing and research environment.

**7. Keep it local:** Present your project to the community. Incorporate local expertise as you develop and fine-tune your tools (keeping in mind language, social norms etc.). Use local enumerators to collect data.

**8. Mainstream gender:** Integrate gender at all stages of data collection. Include both women and men as enumerators. Separate beneficiaries by gender as appropriate. Pay attention to factors such as location, time of day and privacy concerns to make sure data collection is appropriate, safe and inclusive for all. Finally, always disaggregate your data!

**9. Don't overdo it:** Collect only what you need to measure progress toward your indicators. Try not to overburden your beneficiaries (or yourselves!) especially in a short testing period.

**10. Every baseline has an endline:** Think about how you'll collect data from the **same population** at the end of your project to effectively evaluate the impacts of your innovation and testing process.

