**What is a Data Collection Plan?**

This document serves a few main functions:

* Captures the Performance Measures (KPIs) for a process or project.
* Captures brief details on what data sources you’ll be using and documenting current state metrics if applicable.
* Identifies initial targets to guide where improvements need to be made.
* Allows you space to note concerns you may have about the performance measure itself or the data that will be used to support it.

**Directions**

1. Begin by assessing your project to determine what measure or statistics are meaningful indicators of how your process is performing.
2. List the relevant Performance Measures in the left column.
3. For each measure outline what data sources you have access to that can be used to monitor those KPIs.
4. If applicable list the current state for each measure to establish a working benchmark.
5. Identify a target for each measure to give guidance on where and how much of an improvement is desired.
6. Note any comments or concerns you may have relevant to collecting and processing your data.

*Tip: Not all performance measure may have an existing data source to be used or have specific access requirements. Part of your work may include establishing an appropriate data collection mechanism or requesting access to data that measures a KPI. In cases like these, outline the data source you intend use and complete the remaining columns when the information is available.*

*Tip: Keep this document concise. There will likely be iterative step over the course of your work that could change your perspective on the measures and data being used and this should be seen as a living document for the duration of your project.*

**Example**

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| Performance  Measure  *What performance indicators are being measured?* | Data Source(s)  *Where is the data coming from?* | Benchmark / Baseline  *What are today’s readings?* | Target  *What is the ideal goal for the scope of this project?* |
| Public engagement (# of survey responses/ facility) | Physical comment cards and inbox email responses | Averaging 50 responses per public meeting. | No target can be made at this time, each facility has a drastically different volume of citizens served |
| Average time to complete a work plan. (months) | Recorded planning completion start and end dates | Average of 26 months to complete a plan document. | Leadership would like the process to take an average of 18 months. |
| Number of steps needed to complete a plan. | Existing planning process map | Currently 32- steps | Reduce the number of steps to approximately 24 to start, further reduction if possible. |

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| Data Factors | |
| Performance measure | **Notes and Concerns** |
| Public engagement | Overall survey response needs to increase for all facilities, but comparing survey responses to annual facility visitation may be another good indicator of engagement |
| Average time to complete | The range of completion dates is from 9-36 months with an average of 26. However, some plans are updated more regularly and can be done quicker since they’re more relevant to staff than those that have been delayed for long periods of time. |
| Number of Steps to complete | Adjustments in the process and number of steps may influence the overall time to complete and will take time to effectively measure. |

**Worksheet**

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| --- | --- | --- | --- |
| Performance  Measure  *What performance indicators are being measured?* | Data Source(s)  *Where is the data coming from?* | Benchmark / Baseline  *What are today’s readings?* | Target  *What is the ideal goal for the scope of this project?* |
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\* *Use this space to outline details about the data you’ll be using for this project and identify the target outcomes. Reference your Project Charter or SMART goals as needed.*

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| Data Factors | |
| Data Source | **Notes and Concerns** |
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*\* Use this page to outline any concerns you may have with your data. This may include population/sample size, outside variables that influence your data, data biases, data collection time/method, etc.*