

Data Collection Planning Worksheet

Module 4.7 — Data-Informed Advocacy: Building a Realistic Measurement Plan

Instructions

Complete one row per outcome metric. The plan should be executable with existing staff and no specialized research budget. If a collection method requires resources you don't have, identify a simpler proxy. A measurement plan that never gets executed is just a document.

Outcome Metric Planning Table

Metric Name + What It Measures	Collection Method	Timing (baseline / midpoint / endpoint)	Responsible Person	Instrument / Tool	Minimum Quality Standard
Metric 1:					
Metric 2:					
Metric 3:					

Collection Methods Reference

Method	Best For	Low-Cost Tool	Limitation
Survey (online)	Attitude shift, knowledge change, awareness	Google Forms, SurveyMonkey (free tiers)	Low cost; requires recruitment; response rate management
Survey (in-person)	Event audience attitudes, community sentiment	Paper or tablet at event	High response rate; geographic limitation; sampling bias risk
Key informant interviews	Decision-maker relationship quality, commitment level	Structured interview notes	High signal; low sample; qualitative — hard to aggregate
Behavioral observation	Meeting attendance, sign-up behavior, petition signatures	Staff tracking sheet or CRM	Direct; labor-intensive at scale; sampling not always needed
Administrative records	Policy adoption, vote records, regulatory changes	Government websites, board minutes	Definitive for policy outcomes; delayed; binary, not gradational
Media monitoring	Frame dominance, message penetration in coverage	Google Alerts, Meltwater, manual tracking	Measures coverage, not attitude — useful proxy for frame control

Baseline Planning

You cannot measure change without a baseline. For each metric, record your pre-campaign baseline before the campaign launches. If you can't collect a baseline before launch, note why and identify the earliest possible collection point.

Metric	Baseline Value	Date	Notes / Limitations
Metric 1 baseline:			

Metric 2 baseline:			
Metric 3 baseline:			

Strategy Adjustment Triggers

Define in advance the conditions under which you'll change strategy based on data:

Condition	Response Action	Decision Timeline
If metric 1 shows [threshold]:		
If metric 2 shows [threshold]:		
If all metrics lag at midpoint:		
Decision-makers:		