



Data Collection Methods and Field Quality Training Course

30 May – 3 June 2027
Cape town



AGILE LEADERS
Training Center

Data Collection Methods and Field Quality Training Course

Ref: 805_161170 **Date:** 30 May – 3 June 2027 **Location:** Cape town **Fees:** 4500 Euro

Overview

Data Collection Methods and Field Quality Training Course is a five-day professional course for analysts, researchers, monitoring functions, operational teams, and data coordinators who leave with a Data Collection Field Pack. Participants connect information needs, source selection, variables, sampling, questionnaires, interviews, observation, administrative records, field protocols, ethics, quality controls, and documentation. The course addresses evidence weakened by inconsistent instruments and field practice. Agile Leaders Training Center develops data collection methods and field quality.

Who Should Attend

- Analysis functions responsible for defining evidence needs, variables, sources, and collection plans
- Research functions responsible for questionnaires, interviews, observation, sampling, and field documentation
- Monitoring functions responsible for indicators, source quality, verification, and reporting readiness
- Operations functions responsible for site records, checklists, observations, and recurring data capture
- Data coordination functions responsible for codebooks, handovers, issue logs, and quality controls
- Field supervision functions responsible for protocols, consistency, escalation, and review

The course assumes participants can define a work question and use structured records, and leaves out advanced statistical estimation, software programming, database engineering, and academic research writing.

Departments and Industries

The course supports departments and industries that collect primary or administrative evidence for analysis and decisions.

- Research, monitoring, evaluation, planning, quality, operations, and analytics departments
- Healthcare, education, public services, and nonprofit organizations
- Retail, hospitality, telecommunications, and customer-service operations
- Manufacturing, logistics, utilities, and facilities services
- Banking, insurance, consulting, and professional services

Learning Objectives

By the end of this course, participants will be able to:



- Build an information-needs map and source-method decision matrix
- Apply variable, indicator, sampling, and instrument design controls
- Compare survey, interview, observation, and administrative sources
- Diagnose bias, nonresponse, missingness, and field consistency risks
- Evaluate ethical, consent, documentation, and handover requirements
- Build a field protocol, quality log, and analysis-ready codebook

Course Agenda

Day 1: Frame Collection Needs

- Decision Question and Information-Needs Map
- Variable, Indicator, and Operational Definition Register
- Primary, Secondary, and Administrative Source Matrix
- Collection Mode and Respondent Burden Assessment
- Data Collection Plan and Responsibility Map

Day 2: Design Samples and Instruments

- Sampling Frame and Coverage Review Checklist
- Probability and Nonprobability Sampling Decision Guide
- Questionnaire Wording and Response Scale Test
- Skip Logic and Instrument Flow Diagram
- Pilot Test and Revision Evidence Log

Day 3: Apply Field Methods

- Semi-Structured Interview Guide and Probe Bank
- Focus Group Moderator and Note-Taking Protocol
- Structured Observation Checklist and Coding Scheme
- Administrative Record Fitness Assessment
- Document Review Extraction and Traceability Sheet

Day 4: Control Field Quality

- Respondent Selection, Revisit, and Replacement Protocol
- Consent, Privacy, and Ethical Practice Checklist
- Nonresponse, Missingness, and Bias Issue Register
- Field Validation and Supervisor Review Dashboard
- Codebook, Version, and Data Handover Control



Day 5: Practice Data Collection Delivery

- Exercise: Repair an Information-Needs and Source Map
- Exercise: Test a Questionnaire and Sampling Note
- Exercise: Run an Interview and Observation Protocol
- Exercise: Diagnose Field Quality and Handover Issues
- Capstone: Data Collection Field Pack

Practical Exercises

The course uses suggested activities based on healthcare, education, retail, manufacturing, and service operations.

- Suggested activity: convert a decision question into variables, indicators, sources, and assigned collection responsibilities.
- Suggested activity: inspect a sample frame, repair questionnaire wording, test routing, and document a pilot revision.
- Suggested activity: conduct a short interview and observation exercise using consistent probes, codes, and field notes.
- Suggested activity: review nonresponse, bias, validation, codebook, version, and handover evidence before release.

FAQs

Who suits data collection methods and field quality training, and what does it assume?

Analysis, research, monitoring, operations, data coordination, and field supervision functions suit the course; it assumes participants can define a work question and use structured records.

How do data collection methods differ from general data analysis training?

Data collection methods govern how evidence is defined, sourced, sampled, captured, checked, documented, and handed over, while general data analysis training examines and interprets data after collection.

How should teams choose a data collection method?

Teams should compare the question, variable, population, access, sensitivity, timing, respondent burden, source availability, quality risk, and required level of structure before selecting a method.



What makes a field data collection protocol consistent?

A consistent protocol defines respondent selection, contact attempts, revisits, replacements, consent, instructions, coding, escalation, validation, supervision, issue handling, and documentation for every field team.

How should data collection quality be documented?

Data collection quality should be documented through instrument versions, pilot findings, field logs, response records, validation results, issue resolutions, codebooks, approvals, and a traceable handover.

Conclusion

Participants take back a Data Collection Field Pack containing an information-needs map, source matrix, variable register, sampling note, instruments, field protocols, ethics checklist, quality log, codebook, and handover record. It changes informal collection into a controlled evidence workflow. The pack connects questions, sources, participants, controls, issues, and analysis readiness.