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Gathering Information: Finding the Right Method for Your Needs

Getting Started

Your agency is planning a new initiative, and your supervisor has given you a mission. Learn about the technical and management requirements. Find out which other agencies have implemented similar programs. Investigate the political climate. Gauge the potential public reaction.

You know what information you need, but now you have to actually find it.

There are many ways to gather information. Surveys, interviews, and environmental scans are some of the basic methods. You may use just one, or a combination, depending on your resources and the kind of results you want. It's important to recognize that different methods require different techniques and deliver different results.

Before you start any information gathering effort, make sure you understand how the mechanics of the process will impact the results. Consider these questions:

- What specific questions are you trying to answer?
- What you will do with the results?
- Do you need hard facts, or are you seeking opinions, or looking for stories and trends?
- Will you try to generalize what you learn from your sources to a larger situation or population?

Here we'll look at three basic methods used to gather information: surveys, interviews, and environmental scans. Keep your project's objectives and requirements in mind when deciding which method is best suited to your needs.

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Surveying the Landscape

When you need structured information from a large number of people, surveys are the way to go. They allow you to fairly quickly collect data from many people in different locations. Surveys usually employ short, simple questions. They generally offer a series of answers from which participants choose one. For example, your survey could ask respondents how strongly they agree or disagree with statements about the potential impact of your new program. Or you might offer multiple-choice questions that ask people to choose among alternative answers.

Surveys take on a variety of forms. They may be self-administered questionnaires that are distributed by hand, mail, fax, or e-mail. They can also be administered face-to-face or over the phone.

A critical element of survey planning and design is called sampling. For example, if you want to learn what people over 65 think about a particular issue in your state, you could try to find and ask every person over age 65. However, this is not likely to be logistically or financially feasible. Instead, you will probably ask a random sample of the population of seniors. If your sample is drawn with statistical precision (a topic much too complicated for this note), you can then generalize the results from this smaller group to the entire population of people in that age group.

This is what public opinion polls do. When they say in their footnotes that the results are within a “+ or - 5 point margin of error,” they are telling you that the sample size gives them confidence that the result of their survey is within 5 points of the result they would have gotten if they could have collected data from everyone in the population. In other words, if 73 percent of the people interviewed like the new service, the pollsters are confident that 68-78 percent of all seniors agree.

If you don't use statistical sampling, you cannot generalize your findings beyond the group you actually contacted. This is fine when the group is relatively small and well known. For example, if you want to know what county clerks in your state think about a new proposal, you can ask them all, and report your results without worrying about statistical validity.

Benefits of surveys:

- They allow you to assess user, client, or stakeholder opinions and evaluations.
- You can obtain quantifiable results for statistical analysis of such subjective material as attitudes, opinions, and values.
- They enable you to gather demographic descriptions of users, clients, and stakeholders.
- They require little time, cost, and commitment from the participants.
- You can preserve the anonymity of respondents.

Limitations of surveys:

- The questions must be carefully designed and field-tested. You must know what questions to ask and how to word them. Even slightly imprecise wording in the question or the answer choices can give results very different from the ones you seek.
- Surveys provide little or no opportunity to discuss, elaborate, or explain answers. Respondents who don't understand a question may answer improperly.
- Biases or flaws in a sample can make it difficult or inappropriate to generalize about the larger population.



Interviewing Stakeholders

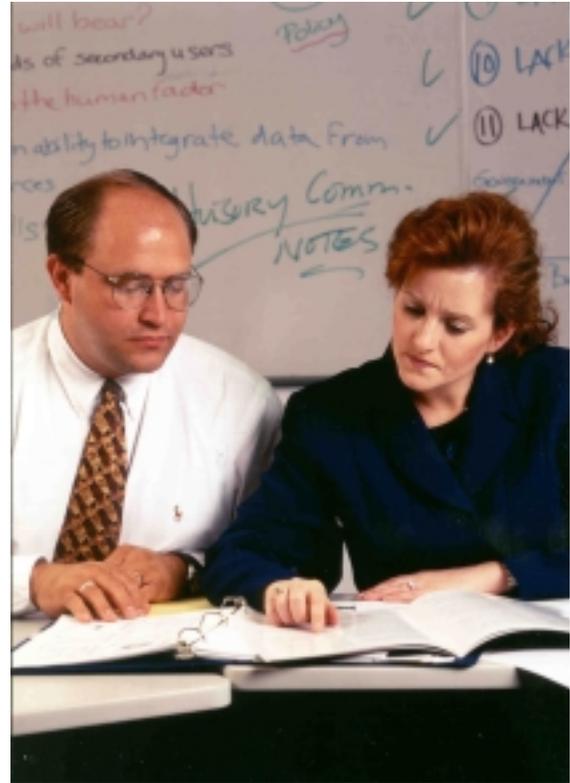
When you want to gather detailed information about people's impressions, experiences, ideas, and attitudes, interviews are often the best method. Face-to-face or telephone conversations yield richer information than surveys, and are a good way to understand complex topics.

There are several types of interviews. All of them can take place with individuals or groups. You may conduct a structured interview with a series of pre-set questions and answers from which the participants choose. A semi-structured interview uses pre-set questions, but allows people to answer them in their own way. Unstructured interviews rely on a general idea of the types of questions you want to ask, but use no predetermined phrasing or order. A computer-mediated conversation, such as an online chat, is another form of interview.

All interviews are documented in some way. This may involve the interviewers taking notes by hand or on laptop computers. Or, the interview sessions may be recorded with audio or video equipment. Having a record of the conversation allows for thorough and accurate analysis and interpretation.

Benefits of interviews:

- You can collect and record complex responses.
- They allow the interviewer and participant to have full discussions and explanations of the questions and answers.
- Interviews encourage participation, establish rapport, and enable observations of non-verbal behavior.



Limitations of interviews:

- Interviews are often more expensive and time consuming to conduct than other information-gathering processes.
- They require considerable commitment and involvement of the participants.
- Training is required to conduct good interviews. Unstructured interviews especially, take special skills.
- Transcription and analysis of interview data can be complex and expensive.



Scanning the Environment

When you want to monitor your surroundings, such as the business climate, environmental scans are useful. These scans help you identify the issues and trends that have important implications for your project. Environmental scans help you identify emerging trends and issues that may have strategic importance for the initiative.

Scanning the environment involves gathering information from a variety of sources: publications, conferences, personal and organizational networks, experts and scholars, market research, etc. The information you gather is then analyzed for planning purposes. Simply gathering the environmental data isn't enough. You must also organize and interpret the data and make it useful for planning and decision making. An environmental scan needs to start with a few specific questions to be answered. For example, what kinds of businesses are being established in our region? Or, what are the characteristics of companies that are drawing in venture capital? Decide which questions you need answered and use them to frame your environmental scans.

Benefits of environmental scans:

- They give rich contextual information.
- You can compare how different media and data sources are reporting on your topic.
- They can help identify emerging opportunities and problems.
- Environmental scans can be an important part of strategic planning by helping you shape a strategy to fit the conditions.
- They enable you to anticipate developments and avoid costly mistakes.

Limitations of environmental scans:

- It's hard to judge the appropriate level of resources to devote to environmental scans.
- You must be careful in interpreting trend information and applying it to forecasts.

Making it Work

Now you know more about the ways to gather information. Carefully consider the kinds of information you need and tailor your efforts to those requirements. You may want to survey other agencies to see how they handled similar projects, interview community members about their opinions, or scan the environment for important trends. You may choose just one of these options if you have a simple project, or you may use all three to obtain a more comprehensive set of results. Choose the methods that maximize your investment. Use the knowledge you gain to fulfill your mission and move your project forward.



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