Logistics Guide for Mail Surveys

Tool Kit Step	Tasks	Required Roles	Suggested Timelines	Equipment and Supplies
3a	❏ Check for existing measures or tools	Project leader	6 weeks before initial mailout	
3b	❏ Develop new tool or modify existing one	Project leader	4 weeks before initial mailout	• *Tool Worksheet*
3c	❏ Assess quality of the tool	Project leader	3 weeks before initial mailout	
4a	❏ Order envelopes and address labels (plus paper and postcards if you plan to do your own copying)	Project leader	3 weeks before initial mailout	• Minimum of 2 envelopes, 3 address labels, 1 copy of questionnaire, 1 copy of initial cover letter and 1 copy of reminder postcard per person
	❏ Arrange for postage (either purchase stamps or arrange for metering)	Project leader	3 weeks before initial mailout	• 1 stamp or meter mark for each outgoing and return envelope of initial mailout and outgoing reminder postcard
	❏ Pre-test and revise if necessary	Project leader/data collectors	2 weeks before initial mailout	• Mailing address of all people intended to receive survey (may have to purchase)
	❏ Reproduce cover letter and questionnaires for initial mailout	Clerk or printshop	1 week before initial mailout	• Cost per page multiplied by the total number of pages
	❏ Stuff envelopes, and affix address labels and postage for initial mailout, which should contain: • cover letter • questionnaire • stamped or metered, addressed return envelope	Clerk	Day of initial mailout	
	❏ Mail envelopes (keep track of how many are mailed)	Clerk	Day of initial mailout	
	❏ Print reminder postcard	Clerk or printshop	8-10 days after initial mailout	
	❏ Affix address labels and postage to reminder post-card	Clerk	10-12 days after initial mailout	
	❏ Mail reminder postcard	Clerk	14 days after initial mailout	
4b and/or 4c-d	❏ Analyse data	Project leader and/or analyst	1-2 weeks after survey cut-off	• *Quantitative Data Analysis Worksheet* and/or *Quantitative Data Organisation Worksheet* and/or *Qualitative Data Analysis Worksheet* • Copy of the questionnaire
5a 5b 5c	❏ Interpret data ❏ Make decisions and prepare action plan ❏ Prepare and disseminate report	Project leader and/or analyst and/or writer	2 - 3 weeks after survey cut-off	• *Interpretation of Findings Worksheet* • *Decisions and Action Plan Worksheet*

Logistics Guide for Activity Logs and Attendance Sheets

Tool Kit Step	Tasks	Required Roles*	Suggested Timelines	Equipment and Supplies
3a 3b 3c	• Check for existing measures or tools • Develop new tool or modify existing one • Assess quality of the tool	Project leader Project leader Project leader	4 weeks before data collection is scheduled to begin 3 weeks before 2 weeks before	• *Tool Worksheet*
4a	• Prepare instructions for people completing the tool	Project leader	1 week before data collection is scheduled to begin	• Completed data collection tool
	• Pre-test and assess data collectors	Project leader/data Collectors	2 weeks before data collection is scheduled to begin	
	• Reproduce tool and instructions	Clerk or printshop	10 days before data collection is scheduled to begin	
	• Distribute tool and instructions	Project leader	3-4 days before data collection is scheduled to begin	
	• Complete tools	Data collector	Ongoing basis during specified time period	
	• Gather completed tools	Project leader	Specified return date	
4b and/or 4c-d	• Analyse data	Project leader and/or analyst	1-2 weeks after completed tools collected	• *Qualitative Data Analysis Worksheet* and/or *Quantitative Data Organisation Worksheet* plus *Quantitative Data Analysis Worksheet* • Copy of the tool
5a 5b 5c	• Interpret data • Make decisions and prepare action plan • Prepare and disseminate the report	Project leader and/or analyst and/or writer	2-3 weeks after completed tools collected	• *Interpretation of Findings Worksheet* • *Decisions and Action Plan Worksheet*

*   This does not necessarily mean you will require different personnel. The same person may assume several of these roles.

Logistics Guide for Case Studies

Tool Kit Step	Tasks	Required Roles*	Suggested Timelines	Equipment and Supplies
3a 3b 3c	• Check for existing measures or tools • Develop new tool or modify existing one • Assess quality of the tool	Project leader Project leader Project leader	6 weeks in advance of data collection 4 weeks in advance of data collection 3 weeks in advance of data collection	• *Tool Worksheet*
4a	• Recruit and select data collectors	Project leader	3 weeks in advance of data collection	• May have to advertise position • Job description (expected duties and tasks plus required abilities, skills and knowledge)
	• Prepare instructions and train data collectors	Project leader	2 weeks in advance of data collection	
	• Pre-test and assess data collectors	Project leader/data collectors	1 week in advance of data collection	• Completed data collection tool
	• Gather data from various sources	Data collectors		
4b and/or 4c-d	• Analyse data	Project leader and/or analyst	Ongoing and 1-2 weeks after data collection	• *Qualitative Data Analysis Worksheet* and/or *Quantitative Data Organisation Worksheet* plus *Quantitative Data Analysis Worksheet* • Copy of the data collection tool
5a 5b 5c	• Interpret data • Make decisions and prepare action plan • Prepare and disseminate the report	Project manager and/or analyst and/or writer	1-3 weeks after analysis is completed	• *Interpretation of Findings Worksheet* • *Decisions and Action Plan Worksheet*

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Logistics Guide for Self-completed Questionnaires and Registration Forms

Tool Kit Step	Tasks	Required Roles*	Suggested Timelines	Equipment and Supplies
3a	• Check for existing measures or tools	Project leader	6 weeks in advance	
3b	• Develop new tool or modify existing one	Project leader	4 weeks in advance	• *Tool Worksheet*
3c	• Assess quality of the tool	Project leader	3 weeks in advance	
4a	• Prepare instructions for people handing out the tool	Project leader	2 weeks in advance	
	• Train people handing out the tool (optional) and provide instructions	Project leader	10 days in advance	
	• Pre-test and revise if necessary	Project leader/data collectors	1 week in advance	• Completed data collection tool
	• Reproduce tool	Clerk or printshop	3-5 days in advance	
	• Distribute tool	Data collectors	Day people complete the tools	
	• Gather completed tools	Data collectors	Return date	
4b and/or 4c-d	• Analyse data	Project leader and/or analyst	1-2 weeks after completed tools collected	• *Quantitative Data Analysis Worksheet* and/or *Quantitative Data Organisation Worksheet* plus *Qualitative Data Analysis Worksheet* • Copy of the tool
5a 5b 5c	• Interpret data • Make decisions and prepare action plan • Prepare and disseminate the report	Project leader and/or analyst and/or writer	2-3 weeks after completed tools collected	• *Interpretation of Findings Worksheet* • *Decisions and Action Plan Worksheet*

* This does not necessarily mean you will require different personnel. The same person may assume several of these roles.