

Project Data Collection Plan

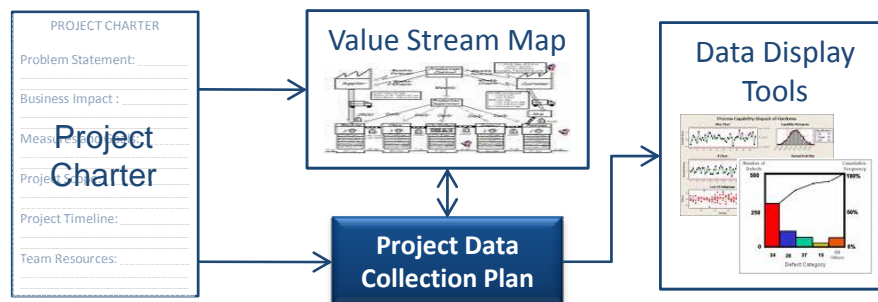
When to Use

- A Project Data Collection Plan should be created prior to formally collecting any project specific data from the process
- Use a Project Data Collection Plan to ensure the gathered data provides the insights needed to improve the process, without wasting resources on gathering unneeded data

Helpful Hints

- Run a pilot based on the data collection plan. Be present during the data collection phase of the pilot. Modify the plan based on the results of the pilot
- Always confirm the trustworthiness of the data before using it to make any decisions
- Use neutral observation of the workplace as another way to gather information. Be sure to only observe the facts – do not assign motives as well

Related Tools



Description

- Project data collection plans remind you of why you're collecting data, they reinforce the standard methods for collecting the data, and they ensure the right data is efficiently collected
- Each measure contained within the plan is described across the following three sections:

Measure Description

- This section provides a specific, agreed upon operational definition of the measure

Methods

- This section describes how the measures are made and how data will be captured and recorded

Sampling Plan

- Part of your challenge is to decide just how much data is sufficient (and representative) without going overboard or not collecting enough data

Existing Data

- Before collecting new data, you may want to see if you have existing data that fits your needs, but **use with caution**. You must be certain you understand exactly what the historical data represents
- Before using existing data, you should check to see if you know that it will answer the right questions, can tell how it was collected, and trust its accuracy and reliability

Project Data Collection Plan (Cont.)

Step by Step Instructions

1. Fill in the header section of the Data Collection Plan Worksheet:
 - Project Name: Title of the project being worked on
 - Process Name: Name of the process that the project is within
 - Project Sponsor: The name of the business leader accountable for the project's success and long-term sustainment of its results. It is best if this person is the Process Owner
 - Project Leader (Lean Belt): The name of the person responsible for leading the project
 - Date Last Updated: Date the worksheet was last updated
2. Working with the team and using the Project Charter and current state Value Stream Map as inputs, develop a list of the measures needed to provide full insight into process performance and the factors impacting that performance. This list should include all needed measures, whether data needs to be collected or is already existing
3. Complete the Measure Description portion of the worksheet, with one line dedicated to each measure
 - Measure: What is the name of the measure?
 - Type (Attribute or Continuous): What type of data is the measure?
 - Attribute = Data that are based on counts, and cannot be subdivided. Only a finite number of values is possible
 - Continuous = Data that can be measured on a continuous scale, and can be divided into ever-smaller measurements, limited only by the measurement or recording system
 - New or Existing Data?: Has the data previously been gathered (Existing), will it need to be gathered fresh (New), or a combination of both (Both?)
 - Operational Definition: Provide a clear, air-tight definition of what you are measuring, which all have agreed
4. Complete the Methods portion of the worksheet:
 - Measurement Method: What specific method will be -- or has been -- used to make the measurements? Inspection by counting? Physical measurement? Type of measurement device?
 - Additional Data Tags: What additional data tags, including stratification factors will be -- or has been -- collected along with the measure? Examples include: Date and time, shift, person, product type, customer, etc.
 - Data Collection Method: What specific method will be -- or has been -- used to capture/record the collected measurement data? Examples include: Data collection sheets, Excel spreadsheet, recorded on a white-board, etc.
5. Complete the Sampling Plan portion of the worksheet:
 - Responsible: Who specifically will be responsible for taking the measurements and/or collecting and organizing the corresponding data?
 - Sampling Approach: What sampling strategy will be -- or has been -- used? Examples include: The entire population of data points, a stratified random sample, process sampling, etc.
 - Frequency: When will samples be taken (or when were they taken), at what frequency, and for how long?
 - Quantity per Sample: How many items will be -- or were -- measured per sample?
6. Execute the plan