

Tips for collecting data in Public Sector Organisations

Recent issues of *The Quarterly* have included articles on the practicalities of collecting data in schools (Jayman, 2014; Rix, 2014). Reading these led me to reflect on my own experiences of data collection in the NHS and, more recently, in the civil service. I resonated with some of the challenges the authors described, such as planning the research and building relationships. However, in conducting research in public sector organisations I have also experienced many unique challenges. The following tips are based on these experiences of collecting data within such organisations and I believe that they will be helpful to anyone planning to collect data within the public sector.

Tip number 1: Be aware of organisational priorities

Public sector organisations are expected to deliver high quality services within a small, and variable, budget. Their staff are normally their most expensive resource and they are therefore likely to expect their employees to only spend their time on important tasks. They are also usually very careful about who they allow access to their customers or patients. You are unlikely to be allowed access to customers or staff unless you can show that your research will be of some benefit to the organisation, and can ensure that the research will be conducted ethically. Accordingly, it is beneficial to think about what your research will offer the organisation and how it will help them to provide a better service. If the organisation can envisage clear benefits from your research, they are more likely to support it. You should also aim to minimise disruption to staff and customers. For example, when conducting my research in the civil service, I wanted to measure a wide range of variables. Using a large battery of questionnaires was not feasible within the employees' working day. Therefore, I used a short questionnaire made up of single item measures to ensure that staff could complete it within 10 or 15 minutes in order to minimise disruption to the business.

Tip number 2: Be realistic about the amount of time you will need

Public sector organisations often have formal processes and procedures which you will need to follow before you can begin collecting data. These can take several months to complete. It is best to find out about procedures as early as possible and allow plenty of time in the planning stage of the research to complete these procedures. For example, if conducting research in the NHS, you will need to receive ethical approval from NHS Research Ethics Committee (REC). You should allow up to 3-4 months for this process (including preparing the application and making any changes that the committee recommends). If you are conducting research in a government organisation, you may need to undergo background checks for security reasons. You may also need a Disclosure and Barring Service (DBS) check, particularly if you will have contact with patients, children or other vulnerable groups. Ensuring you understand the processes you need to go through early on will allow you to make a realistic plan for managing your time.

Tip number 3: Expect and accept change

Change happens frequently in the public sector. This will be more obvious in certain areas and at particular times. Major change often occurs following a change in government policy, however, short term drives on particular issues are apparent at all times. The outcome of this may be that you are asked to provide some data on issues which were not mentioned at the outset of the project. It can be difficult to predict what these will be – particularly if you are collecting data over a relatively long period. Two years into my current project, I have noticed that organisational priorities have shifted several times. It can be stressful when it seems as though expectations have suddenly shifted. Tips 4 to 6 contain some of the things I have put into place to try and manage this.

Tip number 4: Agree aims early on but be flexible

The aims of the research need to be agreed clearly at the start of the project; this should reduce miscommunication from the outset. It is useful to have a written agreement including a timeline which states what you will measure and when, as well as who is responsible for each task identified. This document can then be referred to throughout the research process. I had an agreement in place near the start of my current project and it was very useful to be able to refer back to this. I have been asked along the way about adding in extra questions or variables which are of interest to the organisation. My approach to this has been to take it on a case-by-case basis and discuss the implications of adding these variables with the organisation. I did not feel it would be helpful to dismiss these requests immediately but, at the same time, needed to evaluate how these requests might affect my research question. Discussing the organisation's requests in terms of the impact on staff and the original question allowed us to agree on how to proceed. I have added additional questions into my original survey in response to one request. However, after discussing another request, the organisation and I came to the conclusion that measuring what they wanted to measure would be too disruptive to the research and therefore could be a separate piece of work for the future.

Tip number 5: Offer 'quick wins'

The research process often takes a long time from beginning to end. Since organisational priorities may change over time, offering regular feedback and recommendations based on interim results can be a good idea. These 'quick wins' for the organisation can reinforce the value of what you are doing by reminding them that you are offering them something useful. They also ensure that the feedback they get is timely and relevant. However, you may need to think carefully about how and when you provide feedback and the impact this will have on future data collection. Since I am collecting longitudinal data on staff well-being, I have had to carefully consider what data to share with the organisation and how to do so. Sharing information could potentially affect the results of later data collection if the organisation make changes to their well-being policy or practice as a result. However, without these 'quick wins', organisations may become frustrated with the research process and believe that their goals are not being met in a timely manner. They may therefore provide less support to access participants. The amount of information to feed back, as well as when and how to do so, needs to be carefully considered at the start of the project.

Tip number 6: Do not lose sight of your research aims

It is important to keep the organisation happy and get them engaged with the research. This will probably involve some compromise, whether that involves measuring an extra variable that they are interested in or changing your methods to reduce disruption to the organisation. However, it is important that in making compromises, you do not lose sight of what you set out to do. It is easy to be influenced by the organisation's wider aims and move away from your original question. It is worth regularly coming back to your original aims and asking yourself if you are still on track.

Tip number 7: Find out who your stakeholders are and maintain contact

Public sector organisations are often large and multi-layered. There are likely to be a number of interested parties who will need to be informed about your research before it begins, and who may have their own questions, concerns and input to your project. At a minimum, it is likely you will need to inform senior management, human resources and the relevant unions about the research you are planning to undertake. It is worth doing this as soon as possible in order that any concerns can be addressed at an early stage. The stakeholders you identify may have some important insights which can help you in your planning. My discussions with trade union representatives early in my research were very valuable in providing a very different perspective on the workplace than the one I had gained from speaking to management. This allowed me a more complex and rounded understanding of the workplace which informed my research planning. Agree with your stakeholders the kind of involvement they will have and how often you will keep in touch with them.

Tip number 8: Maintain your independence (and perceived independence)

Engaging and building good relationships with managers is really important in gaining access to your participants, planning the research and understanding the organisation. However, if conducting research with staff or customers, it is important that you are independent of the organisation and do not feel compromised by a close relationship with managers. Firstly, you will need to ensure that you are clear about your boundaries. For example, when conducting research within an organisation, confidentiality and anonymity of participants are particularly important and should be stressed. You will also think about how your participants may perceive you. One of the things which I considered when conducting my current research was how my clothing affected how I was perceived. I noticed that there was a big difference between how the managers and the other employees dressed. Managers wore formal business wear whereas their employees dressed casually in jeans and t-shirts. I wanted to ensure that my participants felt comfortable with me and I was not seen as too close to the management team. However, I also wanted to be seen as professional by managers, particularly when attending meetings. I decided that smart casual wear would be most appropriate. This would allow me to form an independent identity, distinguishing me from managers. I aimed to be seen as both approachable and professional and, importantly, as independent of the organisation.

Tip number 9: Promote your research to staff 'on the ground'

Whether research is with staff, customers or patients, frontline staff are probably the most important people in making it happen. You will need to think about how to communicate with the staff group you are targeting and promote what you are doing. I found the best way to connect with staff in the civil service organisation was attend some team meetings and communicate with the employees face to face. I have also kept in touch by sending email updates on the research which were circulated to all staff. However, when researching in the NHS, going in to speak to staff was not practical due to the nature of the organisation. In this case, I found that the intranet was the best way of disseminating information. The most appropriate format for communication depends on the organisation you are working in and the group that you are targeting. Your contact in the organisation should be able to provide advice on the ways that information is normally communicated and the practicalities of getting your message out.

Tip number 10: Reflect and learn from the experience

Every organisation is different and the challenges you will face cannot always be predicted. Sometimes problems do not have clear answers and you will need to use trial and error to find out what works. As a postgraduate researcher, it is important to reflect on your experience. I feel it is useful to write my reflections by hand; carrying a notebook to jot down ideas and reflections as I go along. However, you need to find a way that works for you. Remember that doing research is a learning experience and it is a huge opportunity to develop your skills and personal characteristics.

Carrying out research in the public sector is challenging. However, I have found that it can be hugely rewarding. I have met many committed people who are keen to improve their working environment and are willing to give up their time to do so. It is a huge privilege to do research which could make an improvement to the ways in which public sector organisations work. Therefore, my final piece of advice is to enjoy it!

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