

Comprehensive Field Data Collection Itinerary Planning for Monitoring and Evaluation: A Framework for Strengthening Field Implementation

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ABSTRACT

Field data collection is a critical phase of monitoring and evaluation (M&E), yet its operational planning is often simplified into generic schedules that inadequately address the complexities of field implementation. Although evaluation literature provides extensive guidance on evaluation design, logistics, supervision, and implementation planning, limited attention has been given to the comprehensive field data collection itinerary as a distinct operational planning instrument. This paper addresses this gap by conceptualizing the comprehensive field data collection itinerary as a micro-level planning tool that bridges evaluation design and field implementation. Anchored in Implementation Science and Utilization-Focused Evaluation, the paper adopts a practice-oriented case scenario of a hypothetical endline evaluation of a multi-component education programme in Mwanza Region, Tanzania, to demonstrate how a comprehensive itinerary can be systematically developed and operationalized. The proposed framework integrates respondents, activities, data collection methods, responsibilities, logistics, supervision, and scheduling into a single implementation plan. The paper shows that, unlike conventional planning instruments, a comprehensive itinerary enhances coordination, logistical efficiency, methodological consistency, stakeholder engagement, and quality assurance, thereby strengthening the validity, reliability, credibility, and utilization of evaluation evidence. It concludes that comprehensive field data collection itineraries should be institutionalized as a standard component of evaluation practice to improve implementation quality and evidence-informed decision-making.

Keywords: Monitoring and Evaluation (M&E); field data collection; field data collection itinerary; implementation science; operational planning; mixed-methods evaluation; education evaluation; Tanzania.

Introduction

Monitoring and evaluation (M&E) plays a central role in evidence-based decision-making, accountability, organizational learning, and adaptive management of development interventions. Within the M&E cycle, field data collection is the principal mechanism for generating primary evidence to assess programme relevance, coherence, effectiveness, efficiency, impact, and sustainability. Consequently, the credibility and usefulness of evaluation findings depend not only on sound methodological design but also on the quality of field implementation (Fitzpatrick et al., 2011; Rossi et al., 2018). Contemporary evaluation guidance similarly emphasizes that credible evaluations require systematic planning of where, when, how, and from whom evidence will be collected (World Bank, 2016; UNICEF, 2025; UNEG, 2016; OECD, 2021; IOM, 2020). Despite this recognition, operational planning for field data collection is often reduced to simplified schedules that provide limited guidance for coordinating respondents, field teams, logistics, supervision, and quality assurance in complex evaluation settings.

These challenges are particularly evident in multi-site, mixed-methods evaluations involving geographically dispersed implementation areas and diverse stakeholder groups. Although the evaluation literature provides extensive guidance on evaluation design, logistics management, supervision, and implementation planning, relatively little attention has been paid to the comprehensive field data-collection itinerary as a distinct operational planning instrument. Existing guidance generally discusses work plans, Gantt charts, logistics plans, travel schedules, supervision arrangements, and field protocols separately rather than integrating them into a framework that systematically translates evaluation design into coordinated field implementation (BetterEvaluation, 2023; OECD, 2021; American Evaluation Association, 2025; UNICEF, 2022; Wilde Ganzen, 2024).

This paper addresses that gap by conceptualizing the comprehensive field data collection itinerary as a micro-level operational planning instrument that links evaluation design with field implementation. Anchored in Implementation Science (Chen, 2015) and Utilization-Focused Evaluation (Patton, 2021), the paper argues that systematic operational planning strengthens implementation quality by integrating methodological, logistical, managerial, and supervisory processes within a single implementation framework.

Using a practice-oriented case scenario of a hypothetical endline evaluation of a multi-component education programme in Mwanza Region, Tanzania, the paper makes three contributions to the monitoring and evaluation literature. First, it introduces a conceptual definition of the comprehensive field data collection itinerary as a distinct operational planning instrument. Second, it demonstrates how such an itinerary can be systematically developed and operationalized within a realistic evaluation context. Third, it presents a transferable planning

framework that evaluators, project managers, researchers, and development practitioners can adapt to strengthen coordination, implementation quality, and the generation of credible and useful evaluation evidence in complex field-based evaluations.

Literature Review and Conceptual Framework

Operational Planning in Monitoring and Evaluation Fieldwork

Operational planning is widely recognized as a fundamental component of successful monitoring and evaluation (M&E) because it translates evaluation designs into implementable field activities. Contemporary evaluation literature emphasizes that methodological rigor depends not only on appropriate evaluation questions, sampling strategies, and analytical techniques, but also on the ability to organize and coordinate field operations in a manner that ensures efficient evidence generation (World Bank, 2016; Bamberger et al., 2016; Rossi et al., 2018). Evaluation planning, therefore, extends beyond preparing data collection tools to include scheduling field activities, assigning responsibilities, coordinating stakeholders, allocating resources, and managing operational risks throughout the evaluation process (Fitzpatrick et al., 2011; UNDP, 2021).

The distinction between evaluation planning and evaluation implementation has become increasingly important within implementation science and evaluation practice. While evaluation planning establishes the overall methodological framework, implementation concerns the practical execution of field activities under real-world conditions (Chen, 2015; Patton, 2021). BetterEvaluation (2023) similarly argues that operational planning should anticipate logistical constraints, stakeholder availability, ethical requirements, and contextual factors that influence fieldwork. Likewise, the OECD (2021) emphasizes that effective evaluations require systematic planning that links evaluation design with practical implementation. Consequently, successful evaluations require planning instruments that bridge the gap between methodological design and operational execution.

Evaluation fieldwork frequently involves multiple teams, geographically dispersed implementation sites, and diverse stakeholder groups whose participation depends on effective coordination. The OECD (2021), the United Nations Evaluation Group (UNEG, 2016), and the American Evaluation Association (2025) highlight that credible evaluations require systematic planning to ensure consistency, transparency, accountability, and professional practice throughout implementation. Field management, therefore, becomes an essential managerial function involving the coordination of personnel, transport, schedules, communication, supervision, and quality control. Without structured operational planning, even technically sound

evaluation designs may encounter implementation challenges that compromise efficiency and evidence quality.

Field Logistics and Data Collection Management

Field logistics constitute one of the most important determinants of successful data collection, particularly in multi-site evaluations involving diverse respondent groups and dispersed geographical locations. Mixed-methods evaluations often require multiple data collection techniques to be implemented within limited timeframes while coordinating respondents, venues, field teams, and transport arrangements (Creswell & Creswell, 2018; Creswell & Plano Clark, 2018). Consequently, effective logistics should encompass route planning, respondent scheduling, accommodation, transport coordination, supervision arrangements, and contingency planning before field implementation begins.

International guidance increasingly recognizes logistics as an integral component of evaluation management rather than merely an administrative activity. FAO (2015), WHO (2024), UNDP (2021), UNICEF (2022), UNEG (2016), and IOM (2020) all emphasize that operational planning should incorporate travel schedules, stakeholder availability, communication mechanisms, field supervision, and resource allocation to facilitate efficient and ethical data collection. These considerations become particularly important in education evaluations where access to schools, local authorities, and community respondents depends upon prior coordination and institutional approval.

Efficient logistical planning directly influences evidence quality by reducing delays, minimizing respondent non-response, improving supervision, and enabling systematic implementation of field protocols. Well-coordinated logistics also reduce unnecessary travel, optimize resource utilization, and allow evaluation teams to devote greater attention to methodological quality rather than operational challenges. Consequently, logistics should be viewed as a strategic component of evaluation quality assurance rather than simply a transport management function, a position also supported by Bamberger et al. (2016), who argue that operational realities frequently influence the quality and utility of evaluation evidence.

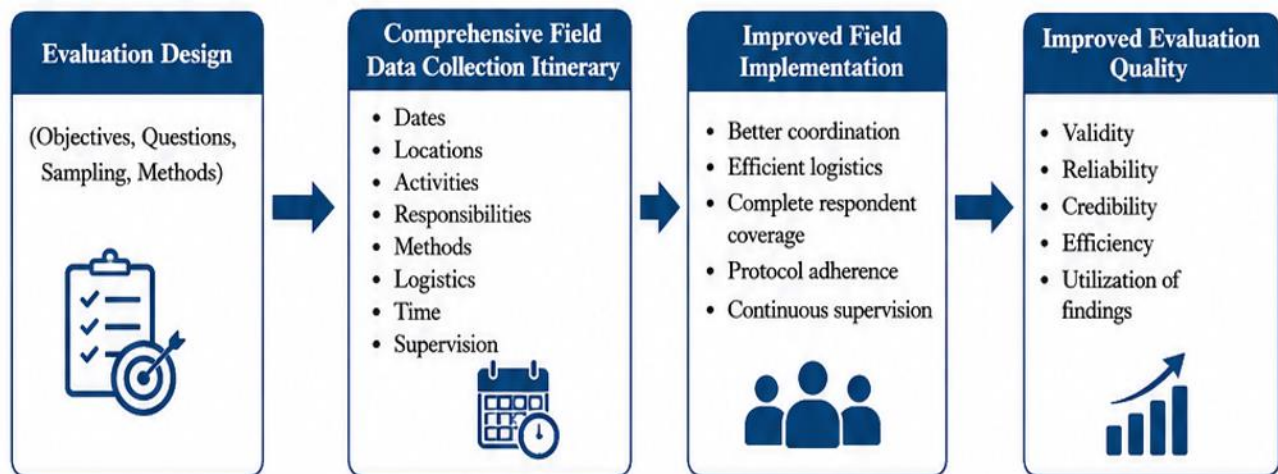
Theoretical Framework

This paper is anchored in *Implementation Science*, which examines how well-designed interventions are translated into effective implementation in real-world settings (Chen, 2015). Within monitoring and evaluation, implementation quality depends not only on sound evaluation methodology but also on the operational systems that support consistent execution of field activities. A comprehensive field data collection itinerary can therefore be understood as an

implementation mechanism that bridges the gap between evaluation design and field execution by coordinating respondents, personnel, logistics, schedules, and supervision.

The paper is also informed by *Utilization-Focused Evaluation* (Patton, 2021), which emphasizes that evaluation processes should be deliberately designed to produce credible and useful evidence for intended users. From this perspective, a comprehensive itinerary contributes to evaluation use by improving respondent coverage, methodological consistency, transparency, supervision, and logistical efficiency, thereby strengthening the credibility and utility of evaluation findings. The proposed itinerary is therefore viewed not merely as a planning schedule but as an operational framework that supports implementation quality and evidence utilization.

Fig 1: Conceptual Framework



Comprehensive Field Data Collection Itinerary: Concept and Components

Although evaluation guidelines provide extensive guidance on evaluation planning and field implementation, few explicitly define a comprehensive field data collection itinerary as a distinct operational planning instrument. Existing guidance typically addresses work plans, travel schedules, supervision plans, and logistics separately rather than integrating these elements into a coherent framework that translates evaluation designs into coordinated field operations (World Bank, 2016; OECD, 2021; BetterEvaluation, 2023). This conceptual gap has limited recognition of the itinerary as an independent component of evaluation methodology.

This paper defines a comprehensive field data collection itinerary as a micro-level operational planning instrument that translates an approved evaluation design into a sequenced fieldwork schedule by integrating sites, respondents, data collection methods, responsibilities, logistics,

travel time, supervision, and daily implementation arrangements required for systematic evidence generation. Unlike a generic work plan, the itinerary focuses on the operational execution of fieldwork by specifying where activities will occur, who will participate, which methods will be used, and how field operations will be coordinated over time. By integrating these operational dimensions within a single framework, the itinerary serves as the practical mechanism through which evaluation methodology is translated into consistent field implementation. It therefore strengthens coordination, logistical efficiency, protocol adherence, supervision, and quality assurance, thereby supporting the generation of credible and useful evaluation evidence in accordance with internationally recognized principles of evaluation management and implementation quality (Patton, 2021; Rossi et al., 2018; UNEG, 2016; OECD, 2021; American Evaluation Association, 2025).

Comprehensive Itinerary Planning, Implementation Quality, and Data Quality

Implementation Science emphasizes that the quality of evaluation evidence depends not only on the soundness of research design but also on the consistency with which field activities are implemented under real-world conditions (Chen, 2015). While data quality is commonly associated with methodological considerations such as sampling, indicator selection, instrument design, and analytical procedures, operational processes during field implementation are equally important determinants of evidence quality (World Bank, 2016; Bamberger et al., 2016; Rossi et al., 2018). Weak coordination, unrealistic scheduling, inadequate supervision, and poorly sequenced field activities can compromise respondent coverage, increase interviewer fatigue, introduce protocol deviations, and generate incomplete or inconsistent datasets. Consequently, implementation quality should be regarded as a methodological consideration rather than merely an administrative concern.

From this perspective, a comprehensive field data collection itinerary functions as an implementation mechanism that operationalizes evaluation methodology through systematic coordination of respondents, data collection methods, logistics, supervision, and daily field activities. By aligning field operations with the approved evaluation design, the itinerary promotes protocol adherence, efficient sequencing of mixed-methods data collection, timely supervision, and rapid resolution of operational challenges (Creswell & Creswell, 2018; Creswell & Plano Clark, 2018). These mechanisms reduce operational errors, strengthen respondent coverage, and improve the completeness, consistency, and credibility of collected evidence. Consistent with Utilization-Focused Evaluation (Patton, 2021) and guidance from UNICEF (2022), UNDP (2021), and UNEG (2016), comprehensive itinerary planning therefore contributes to evidence quality by strengthening the implementation processes through which valid and useful evaluation findings are generated.

Knowledge Gap and Contribution of this Paper

The literature demonstrates substantial progress in evaluation methodology, mixed-methods research, field supervision, and operational management. Nevertheless, limited attention has been devoted to conceptualizing the comprehensive field data collection itinerary as a distinct operational planning instrument within monitoring and evaluation. Existing evaluation guidance generally treats itinerary planning as an administrative or logistical activity rather than recognizing its contribution to methodological rigor, coordination, and evidence quality (BetterEvaluation, 2023; OECD, 2021; American Evaluation Association, 2025; UNICEF, 2022). Consequently, the relationship between evaluation design and day-to-day field implementation remains insufficiently articulated in both scholarly literature and professional guidance.

The absence of a clearly articulated itinerary framework has implications beyond terminology. Without an operational planning model that explicitly links evaluation design with day-to-day implementation, field coordination is often treated as an administrative rather than methodological issue. Consequently, implementation processes that influence respondent coverage, protocol adherence, and evidence quality remain underrepresented in evaluation literature.

This paper addresses that gap through three complementary contributions. *First*, it makes a *conceptual contribution* by defining the comprehensive field data collection itinerary as a distinct micro-level operational planning instrument within monitoring and evaluation. *Second*, it makes a *methodological contribution* by demonstrating how such an itinerary can be systematically developed using a realistic multi-component education evaluation case scenario. *Third*, it makes a *practical contribution* by presenting a replicable operational planning model that evaluators, project managers, researchers, and monitoring and evaluation practitioners can adapt to strengthen coordination, logistical efficiency, supervision, and evidence quality in complex field-based evaluations.

Methodology

Research Design

This paper adopted a practice-oriented case scenario methodology to examine how a comprehensive field data collection itinerary can strengthen monitoring and evaluation (M&E) practice during endline evaluations of complex development programmes. Rather than evaluating a single project, the paper uses a hypothetical but realistic case scenario to illustrate how an evaluation design can be translated into an operational field implementation plan. The objective was therefore methodological rather than empirical, focusing on the conceptualization

and operationalization of a comprehensive field data collection itinerary under real-world conditions.

Development of the Case Scenario

The paper presents a hypothetical endline evaluation of a multi-component education programme situated in Mwanza Region, Tanzania. The scenario incorporates intervention components commonly found in education programmes, including education policy advocacy, school infrastructure development, provision of teaching and learning materials, water, sanitation and hygiene (WASH), child protection, and teacher capacity building. Although the scenario is hypothetical, it was systematically developed from established monitoring and evaluation practice and reflects the typical structure, implementation arrangements, and fieldwork demands of education programmes implemented by governments and development partners.

Mwanza was deliberately selected as the illustrative setting because it represents the operational realities of many large-scale development evaluations in Tanzania. Its geographical location relative to Dar es Salaam and Dodoma, together with its reliance on multimodal transportation systems, rail, road, air, and water transport, creates logistical complexities that require careful coordination of field activities. Consequently, the scenario provides a realistic context for demonstrating how comprehensive itinerary planning can address challenges associated with geographically dispersed implementation sites, multiple administrative levels, and diverse stakeholder groups.

Methodological Principles Guiding the Itinerary

The comprehensive field data collection itinerary was constructed using six methodological principles: operational realism, methodological consistency, stakeholder inclusiveness, logistical feasibility, quality assurance, and implementation efficiency. These principles ensured that every field activity was logically aligned with the evaluation design while remaining feasible under actual field conditions. The itinerary integrated respondent identification, stakeholder mapping, data collection methods, administrative entry procedures, site sequencing, travel logistics, assignment of responsibilities, supervision arrangements, and daily scheduling into a single operational planning framework.

The rationale for this methodological approach is that the quality of evaluation evidence depends not only on research design and data collection instruments but also on the effectiveness with which field operations are planned and implemented. By explicitly linking evaluation methodology with operational execution, the itinerary serves as an implementation mechanism that enhances coordination, methodological consistency, and quality assurance throughout the field data collection process.

Justification for Selecting the Education Sector

The education sector was selected because it represents one of the largest areas of development investment in many low- and middle-income countries and typically involves multiple interventions, geographically dispersed implementation sites, and numerous stakeholder groups operating at national, regional, district, school, and community levels. Endline evaluations of education programmes therefore present considerable logistical and coordination challenges that cannot be adequately managed using simplified field schedules. The sector consequently provides an appropriate context for demonstrating the methodological value of comprehensive itinerary planning.

Transferability of the Framework

Although the illustrative case scenario is situated within an education programme in Mwanza Region, the proposed framework is intended to be transferable rather than context-specific. The planning logic underlying the comprehensive itinerary, including systematic scheduling, stakeholder coordination, logistical planning, supervision, and quality assurance, is applicable across a wide range of development sectors. The framework can therefore be adapted for monitoring and evaluation assignments in health, agriculture, governance, livelihoods, social protection, WASH, and other sectors where fieldwork requires the coordination of multiple respondents, institutions, locations, and data collection methods. Its value lies not in the education context itself but in providing a replicable operational model that strengthens implementation quality and supports the generation of credible, reliable, and useful evaluation evidence.

Development, Verification, and Validation of the Field Data Collection Itinerary

The field data collection itinerary should be developed by the lead evaluator or evaluation team during the inception phase of the assignment after the evaluation methodology, sampling framework, and data collection plan have been finalized. The itinerary should translate the evaluation design into a detailed operational fieldwork schedule by specifying the sequence of activities, locations, respondents, data collection methods, travel arrangements, responsibilities, and daily time allocations. Its preparation should be informed by multiple sources of information, including the Terms of Reference (ToR), technical proposal, inception report, sampling framework, project implementation documents, stakeholder mapping, administrative procedures, travel routes, locations of sampled sites, and the proposed data collection methods. Inputs should also be obtained from the client, project management team, regional and district focal persons, and other relevant stakeholders to ensure that the itinerary reflects the operational realities of the evaluation while remaining consistent with the approved methodology.

Before field implementation, the draft itinerary should undergo both verification and validation to confirm its technical quality and operational feasibility. Verification should be undertaken by the evaluation team to assess the logical sequencing of activities, consistency between respondents and data collection methods, adequacy of travel time, feasibility of daily workloads, and alignment with the evaluation objectives and sampling design. Following internal verification, the itinerary should be shared with the client, project management team, Regional Administrative Secretary (RAS), District Executive Directors (DEDs), and other relevant local authorities for validation. The validation process should confirm respondent availability, accessibility of sampled sites, transport arrangements, administrative entry procedures, and the practicality of the proposed schedule. Comments received during the validation process should be incorporated into the final itinerary before fieldwork commences. Although minor adjustments may become necessary during implementation in response to unforeseen operational circumstances, the validated itinerary should serve as the principal operational document for coordinating field activities, managing logistics, supervising field teams, and ensuring systematic implementation of the evaluation.

The Case Scenario

For purposes of this paper, the case scenario assumes an endline evaluation of a hypothetical multi-component education project implemented in two districts of Mwanza Region, namely Nyamagana and Ukerewe. The project represents a typical education programme implemented by governments and development partners and comprises intervention areas commonly found in the education sector, including education policy advocacy, school infrastructure development, provision of teaching and learning materials, water, sanitation and hygiene (WASH) services, child protection interventions, and teacher capacity building. The scenario is designed to illustrate how a comprehensive field data collection itinerary can be developed and operationalized to support effective planning and implementation of monitoring and evaluation (M&E) fieldwork.

The project office is assumed to be located in Dodoma, while the consultant commences and concludes the assignment in Dar es Salaam. Preparatory activities include travel from Dar es Salaam to Dodoma by Standard Gauge Railway (SGR), a kick-off meeting with the project team at the project office, and a consultative meeting with the Commissioner for Education at the Ministry of Education. Following these engagements, the consultant travels by air from Dodoma to Mwanza to undertake regional and district-level field data collection.

Upon arrival in Mwanza, the consultant conducts a courtesy meeting with the Regional Administrative Secretary (RAS) to obtain administrative clearance and discuss the purpose and schedule of the evaluation before commencing district fieldwork. At the completion of field

activities, a regional exit meeting is held with the RAS to present preliminary observations and formally conclude regional-level engagement.

Within each district, fieldwork begins with an entry meeting with the District Executive Director (DED), followed by a Key Informant Interview (KII) with the District Education Officer (DEO). These activities provide administrative entry, facilitate coordination with district authorities, and generate contextual information on education service delivery and project implementation. At the conclusion of fieldwork in each district, an exit meeting is conducted with the DED to provide preliminary feedback and formally close district-level engagement.

The evaluation includes field data collection in one purposively selected primary school in each district. School-level respondents comprise students, teachers, the Head Teacher, and members of the School Management Committee (SMC). Additional data are collected from implementing agencies, community representatives, and development partners operating within the project area. The evaluation adopts a mixed-methods approach, employing survey questionnaires, Key Informant Interviews (KIIs), Focus Group Discussions (FGDs), direct observation, document review, and consultative meetings to generate comprehensive endline evidence.

The proposed transport arrangements reflect the geographical characteristics of the assignment. Standard Gauge Railway (SGR) is used for travel from Dar es Salaam to Dodoma; commercial air transport is used between Dodoma and Mwanza, and for the return journey from Mwanza to Dar es Salaam, sea ferry transport is used for travel to and from Ukerewe District, while motor vehicles are used for movement within and between districts, administrative offices, schools, and community locations.

District-level engagements are conducted primarily at District Executive Director offices, project implementation sites, partner offices, community venues, and sampled primary schools. The itinerary assumes that field activities are undertaken between 8:00 a.m. and 5:00 p.m. on weekdays only, with weekends and public holidays reserved for rest, although they may be used for travel when operationally necessary. Daily schedules incorporate realistic allowances for travel between venues, health breaks, meal breaks, internal team debriefings, and other operational transitions to ensure that the itinerary remains practical and implementable under normal field conditions.

For purposes of this illustrative scenario, field data collection is assumed to commence on Monday, 5 October 2026. The scenario further assumes that all required administrative clearances, ethical approvals, institutional permissions, and logistical arrangements have been secured before commencement of fieldwork. Although Global Positioning System (GPS) coordinates are maintained within the operational version of the itinerary to facilitate navigation,

supervision, and verification of site visits, they are omitted from the publication version to improve readability and conserve space.

Table 1. Comprehensive Field Data Collection Itinerary (Illustrative Case Scenario)

Date	District/ Location	Venue	Activity	Responsibility	Data Collection Method/ Other	Distance from Previous Site (km)	Transport	Time
Mon 5 Oct 2026	Dar es Salaam	SGR Station	Depart for Dodoma	Consultant	Travel	452	SGR	06:00–11:30
Mon 5 Oct 2026	Dodoma	Hotel	Check-in and preparation	Consultant	Internal preparation	5	Vehicle	11:30–12:30
Mon 5 Oct 2026	Dodoma	Ministry of Education	Consultative meeting with the Commissioner for Education	Consultant, Commissioner	Consultative meeting	4	Vehicle	14:00–16:00
Tue 6 Oct 2026	Dodoma	Project Office	Kick-off meeting	Consultant, Project Team	Meeting	3	Vehicle	08:00–10:00
Tue 6 Oct 2026	Dodoma	Project Office	Review project documents	Consultant	Document review	0	—	10:00–11:00
Tue 6 Oct 2026	Dodoma	Airport	Travel to Mwanza	Consultant	Travel	12	Vehicle/Air	11:00–14:00
Tue 6 Oct 2026	Mwanza	RAS Office	A courtesy meeting with the Regional Administrative Secretary	Consultant, RAS	Consultative meeting	9	Vehicle	15:00–16:00
Tue 6 Oct 2026	Mwanza	Hotel	Team briefing and review of field schedule	Consultant	Internal meeting	3	Vehicle	16:00–17:00
Wed 7 Oct 2026	Nyamagana	DED Office	Entry meeting with District Executive Director	Consultant, DED	Entry meeting	6	Vehicle	08:00–08:45
Wed 7 Oct 2026	Nyamagana	DED Office	Key Informant Interview with District Education Officer	Consultant	KII	0	—	08:45–10:00
Wed 7 Oct 2026	Nyamagana	DED Office	Review district education documents	Consultant	Document review	0	—	10:00–11:00
Wed 7 Oct 2026	Nyamagana	Primary School	Travel to sampled primary school	Consultant	Travel	9	Vehicle	11:00–11:45
Wed 7 Oct 2026	Nyamagana	Primary School	Courtesy meeting with Head Teacher	Consultant	Consultative meeting	0	—	11:45–12:00
Wed 7 Oct 2026	Nyamagana	Primary School	Lunch break	Team	Break	0	—	12:00–13:00
Wed 7 Oct 2026	Nyamagana	Primary School	Observation of school infrastructure	Consultant	Observation	0	—	13:00–15:00
Wed 7 Oct 2026	Nyamagana	Primary School	Daily debrief	Consultant	Internal review	0	—	15:30–17:00
Thu 8 Oct	Nyamagana	Primary	Survey administration	Enumerators	Survey	0	—	08:00–

2026	na	School	to students					09:30
Thu 8 Oct 2026	Nyamagana	Primary School	Focus Discussion Group with students	Consultant	FGD	0	—	09:45–10:45
Thu 8 Oct 2026	Nyamagana	Primary School	Focus Discussion Group with teachers	Consultant	FGD	0	—	11:00–12:00
Thu 8 Oct 2026	Nyamagana	Primary School	Lunch break	Team	Break	0	—	12:00–13:00
Thu 8 Oct 2026	Nyamagana	Primary School	Key Informant Interview with Head Teacher	Consultant	KII	0	—	13:00–14:00
Thu 8 Oct 2026	Nyamagana	Primary School	Focus Discussion Group with School Management Committee	Consultant	FGD	0	—	14:15–15:30
Thu 8 Oct 2026	Nyamagana	Primary School	Team debrief	Consultant	Internal review	0	—	15:30–17:00
Fri 9 Oct 2026	Nyamagana	Community	Focus Discussion Group with community representatives	Consultant	FGD	5	Vehicle	08:00–09:30
Fri 9 Oct 2026	Nyamagana	Implementing Partner Office	Key Informant Interview with the implementing partner	Consultant	KII	3	Vehicle	10:00–11:00
Fri 9 Oct 2026	Nyamagana	Development Partner Office	Key Informant Interview with development partner	Consultant	KII	2	Vehicle	11:15–12:15
Fri 9 Oct 2026	Nyamagana	DED Office	Lunch break	Team	Break	2	Vehicle	12:30–13:30
Fri 9 Oct 2026	Nyamagana	DED Office	Exit meeting with District Executive Director	Consultant, DED	Debrief meeting	1	Vehicle	14:00–15:00
Fri 9 Oct 2026	Nyamagana	Hotel	Daily review and preparation	Consultant	Internal review	4	Vehicle	15:00–17:00
Sat 10 Oct 2026	Mwanza	Hotel	Weekend	Consultant	Rest day	0	—	Rest
Sun 11 Oct 2026	Mwanza	Hotel	Weekend	Consultant	Rest day	0	—	Rest
Mon 12 Oct 2026	Mwanza	Ferry Terminal	Travel to Ukerewe	Consultant	Travel	55	Ferry	08:00–11:30
Mon 12 Oct 2026	Ukerewe	DED Office	Entry meeting with District Executive Director	Consultant, DED	Entry meeting	3	Vehicle	13:00–13:45
Mon 12 Oct 2026	Ukerewe	DED Office	Key Informant Interview with District Education Officer	Consultant	KII	0	—	13:45–15:00
Mon 12 Oct 2026	Ukerewe	Hotel	Daily debrief	Consultant	Internal review	3	Vehicle	15:30–17:00

Tue 13 Oct 2026	Ukerewe	Primary School	Travel to sampled primary school	Consultant	Travel	18	Vehicle	08:00–08:45
Tue 13 Oct 2026	Ukerewe	Primary School	Courtesy meeting with Head Teacher	Consultant	Consultative meeting	0	—	08:45–09:00
Tue 13 Oct 2026	Ukerewe	Primary School	Observation of school infrastructure	Consultant	Observation	0	—	09:00–11:00
Tue 13 Oct 2026	Ukerewe	Primary School	Survey administration to students	Enumerators	Survey	0	—	11:00–12:00
Tue 13 Oct 2026	Ukerewe	Primary School	Lunch break	Team	Break	0	—	12:00–13:00
Tue 13 Oct 2026	Ukerewe	Primary School	Focus Group Discussion with students	Consultant	FGD	0	—	13:00–14:00
Tue 13 Oct 2026	Ukerewe	Primary School	Focus Group Discussion with teachers	Consultant	FGD	0	—	14:00–15:00
Tue 13 Oct 2026	Ukerewe	Primary School	Key Informant Interview with Head Teacher	Consultant	KII	0	—	15:00–16:00
Wed 14 Oct 2026	Ukerewe	Primary School	Focus Group Discussion with School Management Committee	Consultant	FGD	0	—	08:00–09:30
Wed 14 Oct 2026	Ukerewe	Community	Focus Group Discussion with community representatives	Consultant	FGD	4	Vehicle	10:00–11:30
Wed 14 Oct 2026	Ukerewe	Implementing Partner Office	Key Informant Interview with the implementing partner	Consultant	KII	2	Vehicle	13:00–14:00
Wed 14 Oct 2026	Ukerewe	Development Partner Office	Key Informant Interview with development partner	Consultant	KII	1	Vehicle	14:15–15:15
Wed 14 Oct 2026	Ukerewe	DED Office	Exit meeting with District Executive Director	Consultant, DED	Debrief meeting	2	Vehicle	15:30–16:30
Thu 15 Oct 2026	Ukerewe	Ferry Terminal	Return to Mwanza	Consultant	Travel	55	Ferry	08:00–11:30
Thu 15 Oct 2026	Mwanza	RAS Office	Regional exit meeting and presentation of preliminary observations	Consultant, RAS	Debrief meeting	5	Vehicle	14:00–15:30
Fri 16 Oct 2026	Mwanza	Airport	Departure to Dar es Salaam	Consultant	Travel	850	Air	08:00–10:00
Fri 16 Oct 2026	Dar es Salaam	Office	Assignment closure and organization of field records	Consultant	Internal documentation	15	Vehicle	11:00–13:00

Discussion

Rationale for the Columns in the Comprehensive Field Data Collection Itinerary

Date:

The *Date* column establishes the chronological sequence of field activities and aligns fieldwork with school calendars, institutional schedules, weekdays, and public holidays. By providing a realistic implementation timeline, it supports orderly sequencing of activities and facilitates monitoring of field progress.

Location

The *Location* column identifies the geographical area in which each activity will be undertaken, ensuring systematic coverage of sampled sites. It supports respondent coverage, route planning, and efficient allocation of field resources while reducing the likelihood of omitting selected locations.

Venue

The *Venue* column specifies the exact institution or site where each activity will occur, such as district offices, schools, or community meeting points. Clearly identifying venues facilitates administrative access, coordination with host institutions, and timely engagement with intended respondents.

Activity

The *Activity* column translates the evaluation design into specific field tasks, including interviews, focus group discussions, observations, document reviews, and meetings. It promotes adherence to the evaluation protocol by ensuring that planned activities are implemented in the intended sequence.

Responsibility

The *Responsibility* column identifies the individual or team accountable for each activity. Clear allocation of responsibilities strengthens accountability, facilitates supervision, and promotes consistent implementation across field teams.

GPS Coordinates

Although omitted from the published version, the *GPS Coordinates* column provides precise geographical references for sampled sites in the operational itinerary. GPS information supports

navigation, verification of site visits, monitoring of field coverage, and documentation of completed activities.

Data Collection Method

The *Data Collection Method* column links each activity with the appropriate evidence-generation technique, such as surveys, key informant interviews, focus group discussions, observation, or document review. This ensures that each respondent group is engaged using methods consistent with the evaluation design and supports methodological triangulation in mixed-methods evaluations.

Distance from Previous Site

The *Distance from Previous Site* column incorporates travel requirements into daily planning. By informing route sequencing and estimating travel demands between successive activities, it improves logistical efficiency, reduces unnecessary travel, and helps develop realistic daily schedules.

Transport

The *Transport* column specifies the mode of travel required between locations, including road, rail, air, or ferry transport. Integrating transport arrangements into the itinerary supports travel planning, minimizes operational disruptions, and ensures timely movement between field sites.

Time

The *Time* column allocates realistic durations for travel, meetings, interviews, observations, and transition periods. Appropriate time allocation supports balanced daily workloads, reduces interviewer and respondent fatigue, and provides opportunities for supervision, debriefing, and quality checks throughout field implementation.

Comparative Discussion: Positioning the Comprehensive Field Data Collection Itinerary among Existing Planning Instruments

The comprehensive field data collection itinerary should be viewed as a complementary operational planning instrument rather than a replacement for existing evaluation planning tools. Traditional planning instruments, including evaluation work plans, Gantt charts, logistics plans, and supervision plans, each serve distinct management functions. Evaluation work plans provide the overall roadmap for implementing the consultancy, Gantt charts summarize the timing of major activities and deliverables, logistics plans focus primarily on transport and resource arrangements, and supervision plans guide quality assurance and oversight of field teams. While

these instruments are valuable, they are generally developed independently and rarely integrate the operational details required for day-to-day implementation of field data collection.

The comprehensive itinerary differs by consolidating these operational dimensions into a single implementation framework. It integrates locations, respondents, data collection methods, responsibilities, travel arrangements, timing, and supervision requirements within one coordinated schedule. By explicitly linking evaluation methodology with daily field operations, the itinerary serves as the practical mechanism through which the evaluation design is translated into executable field activities. This integrated approach reduces fragmentation between planning documents and improves communication among evaluators, enumerators, drivers, project staff, and local authorities.

Compared with conventional planning instruments, the comprehensive itinerary offers several operational advantages. First, it improves coordination by ensuring that respondents, venues, transport, and field teams are synchronized before fieldwork begins. Second, it enhances implementation efficiency by minimizing duplicate travel, scheduling conflicts, and idle time between activities. Third, it strengthens methodological quality by ensuring that all sampled respondents, data collection methods, and quality assurance procedures are systematically implemented according to the approved evaluation design. Collectively, these improvements contribute to greater validity, reliability, credibility, and utilization of evaluation findings.

The itinerary is particularly valuable for complex evaluations involving multiple districts, geographically dispersed implementation sites, diverse stakeholder groups, mixed-methods data collection, or several field teams operating simultaneously. Under these conditions, simplified work plans or logistics schedules often provide insufficient operational guidance, increasing the risk of missed interviews, incomplete respondent coverage, inconsistent implementation, and avoidable operational costs. By integrating planning, coordination, and supervision within a single operational document, the itinerary helps address these common implementation challenges.

However, a comprehensive itinerary may not be necessary for every evaluation. Small-scale evaluations or studies conducted at a single site, rapid assessments with limited stakeholder groups, or evaluations involving only a few interviews may be adequately managed using conventional work plans and simple daily schedules. Likewise, where implementation contexts are highly uncertain or subject to frequent disruption, the itinerary should be applied flexibly and updated regularly to accommodate changing field conditions. Its greatest value, therefore, lies in complex field-based evaluations where systematic coordination is essential for producing high-quality evidence.

Accordingly, the comprehensive field data collection itinerary should be regarded as a complementary operational instrument that fills the gap between strategic evaluation planning and day-to-day field implementation. Rather than replacing work plans, Gantt charts, logistics plans, or supervision plans, it integrates their operational elements into a coherent implementation framework that strengthens field coordination, implementation quality, and the generation of credible and useful evaluation evidence.

Table 2: Comparison of Existing Planning Instruments

Planning Instrument	Primary Purpose	Limitation	Added Value of a Comprehensive Itinerary
Evaluation Work Plan	Overall assignment planning	Too broad for daily field operations	Operationalizes field implementation
Gantt Chart	Timeline of activities	Does not specify field logistics or respondents	Links activities with locations, stakeholders, and methods
Logistics Plan	Transport and resource management	Focuses mainly on logistics	Integrates logistics with methodology and stakeholder coordination
Supervision Plan	Quality assurance and oversight	Does not organize daily field activities	Embeds supervision within operational scheduling
<i>Comprehensive Field Data Collection Itinerary</i>	Integrated operational management of fieldwork	Requires more preparation for complex evaluations	Bridges evaluation design and field implementation while improving coordination, efficiency, evidence quality, and utilization

Why sharing the itinerary is important

Sharing the itinerary with the project team, regional and district authorities, school leaders, and other stakeholders is essential because it improves both administrative preparedness and evaluation quality. Specifically, it:

- Gives advance notice to officials and institutions expected to participate in the study.
- Facilitates scheduling of interviews and meetings with busy respondents such as DEDs, DEOs, and school heads.
- Enables transport, accommodation, and ferry arrangements to be made in advance.
- Improves coordination between the consultant, enumerators, drivers, and local focal persons.
- Supports transparency and accountability by allowing supervisors and project managers to track field progress against the approved plan.
- Reduces the likelihood of missed appointments, duplicated travel, and uncoordinated field movements.

Practical limitations in operationalizing the itinerary

Although the itinerary is comprehensive, its implementation may still be affected by several operational constraints, including:

- Changes in availability of district officials, school heads, teachers, and community representatives.
- Long travel distances between districts and schools, especially where road infrastructure is poor.
- Ferry delays or weather-related disruptions affecting travel to and from Ukerewe.
- Public holidays, examinations, school events, or emergency meetings that disrupt planned data collection days.
- Vehicle breakdowns, fuel shortages, or delays in accessing remote sites.
- Field fatigue and reduced productivity where the same team must maintain intensive daily schedules for several weeks.
- Risk of rushed interviews or incomplete observation when too many activities are scheduled within one day.

Mitigation measures for operationalizing the itinerary

To make the itinerary workable in practice, the following mitigation measures are important:

- Share the itinerary in advance with the RAS, DEDs, schools, and implementing partners to confirm dates and respondent availability.
- Keep the itinerary flexible by allowing room for adjustments when meetings are postponed or travel delays occur.
- Build in buffer time for long-distance travel, ferry connections, and spill-over interviews.
- Use daily debrief sessions to review progress, identify gaps, and revise the next day's schedule where necessary.
- Secure reliable vehicles, experienced drivers, and contingency transport arrangements.
- Maintain a hidden GPS and contact directory for sampled sites to reduce time lost in navigation and coordination.
- Clearly divide tasks among consultants, enumerators, and support staff to reduce overload and strengthen quality control.
- Reserve weekends primarily for rest, but keep them available for catch-up travel or internal review when unavoidable.

Distinction between the Evaluation Work Plan and the Data Collection Itinerary

Although both the evaluation work plan and the field data collection itinerary support evaluation implementation, they serve different purposes and operate at different levels of planning. The evaluation work plan is a macro-level management tool prepared during the proposal stage to demonstrate how the overall assignment will be executed from inception to final reporting. It outlines the major phases, deliverables, staffing inputs, and timelines, providing the client with an overview of the consultant's implementation strategy. Because it is prepared before field arrangements are finalized, it remains indicative and does not usually specify operational details such as respondent availability, site sequencing, transport routes, administrative entry procedures, or daily field schedules.

In contrast, the comprehensive field data collection itinerary is a micro-level operational planning instrument developed during the inception phase after the evaluation design, sampling strategy, stakeholder mapping, and field logistics have been finalized. It translates the approved evaluation design into an executable field implementation schedule by integrating dates, locations, venues, respondents, data collection methods, responsibilities, transport arrangements, travel distances, supervision, and daily timing within a single framework. Unlike the proposal work plan, which answers what activities will be undertaken and when, the itinerary specifies how, where, with whom, and in what sequence field evidence will be generated. Rather than replacing the work plan, it complements it by bridging the gap between strategic evaluation planning and day-to-day field implementation, thereby strengthening coordination, implementation efficiency, methodological consistency, and the quality of evaluation evidence.

Table 3: Distinction between the Evaluation Work Plan and the Data Collection Itinerary

Aspect	Evaluation work plan in the proposal	Data collection itinerary in the inception report
Purpose	Shows how the whole evaluation assignment will be implemented	Shows how field data collection will be operationalized in practice
Timing of preparation	Prepared at the proposal/bidding stage	Prepared during the inception stage after refining the methodology
Scope	Entire evaluation cycle	Field data collection component only
Level of detail	Broad tasks, phases, and deliverables	Daily field schedule with sites, activities, respondents, methods, and travel
Typical content	Inception, desk review, tool development, fieldwork period, analysis, reporting	Dates, districts, venues, activities, responsibilities, methods, transport, time, distance

Main audience	Client and procurement/contract management team	Consultant team, client, field supervisors, district authorities, and host institutions
Function	Strategic and contractual planning tool	Operational and coordination tool for field implementation
Nature	Macro-level evaluation schedule	Micro-level fieldwork execution schedule

Conclusion

This paper contributes to the monitoring and evaluation literature by conceptualizing the comprehensive field data collection itinerary as a distinct micro-level operational planning instrument that links evaluation design with field implementation. Although existing evaluation guidance recognizes the importance of planning, it has given limited attention to how day-to-day field operations can be systematically organized within a single implementation framework. By defining the comprehensive itinerary and demonstrating its application through a practice-oriented case scenario, the paper extends current understanding of operational planning as an integral component of evaluation methodology rather than merely an administrative activity.

The proposed framework has important practical implications for evaluators, consulting firms, government institutions, development partners, and researchers undertaking complex field-based evaluations. By integrating respondents, activities, data collection methods, responsibilities, logistics, supervision, and scheduling within one operational document, the itinerary provides a structured approach to coordinating field implementation while complementing existing planning instruments such as work plans, Gantt charts, logistics plans, and supervision plans. Its greatest value lies in evaluations involving multiple stakeholders, geographically dispersed sites, and mixed-methods data collection, where effective coordination is essential for successful implementation.

The paper recommends that comprehensive field data collection itineraries be institutionalized as a standard component of inception reporting and field preparation for complex evaluations. Future research should move beyond conceptual development by empirically examining the effectiveness, efficiency, and cost-effectiveness of comprehensive itinerary planning across different sectors, evaluation designs, and implementation contexts. Such studies would provide stronger evidence on the contribution of operational planning to implementation quality, evidence generation, and the utilization of evaluation findings for evidence-informed decision-making.

More broadly, recognizing operational planning as a methodological determinant of implementation quality broadens conventional perspectives on evaluation practice by

demonstrating that credible evidence depends not only on rigorous evaluation design but also on the systematic organization of field implementation. Institutionalizing comprehensive field data collection itineraries, therefore, has the potential to strengthen both the conduct and utilization of evaluations across diverse development contexts.

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Acronyms and Abbreviations

DAC	Development Assistance Committee
DED	District Executive Director
DEO	District Education Officer
DUCE	Dar es Salaam University College of Education
FAO	Food and Agriculture Organization of the United Nations
FGD	Focus Group Discussion
GPS	Global Positioning System
IOM	International Organization for Migration
KII	Key Informant Interview
M&E	Monitoring and Evaluation
OECD	Organisation for Economic Co-operation and Development
RAS	Regional Administrative Secretary
SGR	Standard Gauge Railway
SMC	School Management Committee
ToR	Terms of Reference
UNDP	United Nations Development Programme
UNEG	United Nations Evaluation Group
UNICEF	United Nations Children's Fund
WASH	Water, Sanitation and Hygiene
WHO	World Health Organization

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