



National Centre for Research Methods

NCRM Reflections on TCB Activity

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NCRM Reflections on TCB Activities

1. Introduction

At the NCRM training meeting in May 2006 it was noted that it would be helpful for the Nodes to reflect on the training and capacity building (TCB) activities undertaken with the view to sharing information on what had been learnt in relation to teaching and learning. This is particularly timely given the next phase of NCRM with new Nodes coming on board and the creation of the TCB Sub-Committee which provides a forum for developing TCB strategy.

This paper is not a summary of all the activities being undertaken by the Nodes but is intended to highlight some of the different TCB activities Nodes have undertaken and some of the specific things that have been learnt about what works and what does not and some of the current challenges. Some of these issues warrant further discussion and debate in relation to strategy or practice, others provide information on good practice and may provide some useful information for Nodes' consideration in relation to TCB. This paper highlights some of the issues identified with the aim of:

- i) providing information to individual nodes about the advantages, disadvantages and issues for consideration relating to specific formats of teaching and learning
- ii) informing discussion about TCB within NCRM more generally; some of the issues identified here might usefully be explored in the NCRM TCB sub-committee.

All 6 current Nodes (2005-2008) and CASS (Courses in Applied Social Surveys) were asked to reflect on their TCB activities and to send a short reflection of key issues. We received responses from five nodes and CASS in relation to this information. This paper summarises and brings together some of the key issues highlighted. The specific group identifying each issue highlighted below are identified. The full reports are included as an appendix for further information on each issue.

2. Workshops

Workshops are the most common format for TCB and issues relating to workshops were reflected on by all four Nodes. The issues highlighted in this section relate to traditional face-to-face training workshops open to external audiences. Issues relating to workshops which are commissioned for specific groups are outlined separately below. Issues highlighted here relate to: venues for TCB; identifying and recruiting participants; teaching and learning; practical aspects of organisation; post-course resources and impact.

2.1 Venues

NCRM aims to run events across the UK; ESRC Regional Training Centres (RTC) are commonly used for our events as there is no charge to ESRC programmes for booking these venues. However, Nodes identified some issues in relation to the use of RTCs and other venues outside of their own institution:

- The use of ESRC Regional Training Centres has been identified as problematic. CASS has experienced problems in booking venues during term time. They have also experienced problems (on 2 occasions) in bookings being cancelled and a lack of administrative support at the RTC. For QUALITI, the technological requirements of workshops are not accommodated within the RTCs. For RLM the requirement is for conference style facilities and breakout rooms which do not seem to be accommodated.
- Occasional difficulties have been identified in running events in venues that aren't known to presenters; it is important to have knowledge of remote venues to avoid problems (RLM).

2.2 Participants

NCRM aims to provide training for researchers across the career lifespan. However, generally its courses are open to all. Issues identified in relation to recruiting participants were:

- For some specialist courses it may be beneficial to screen applicants to ensure motivated participants and that the course will meet their needs (LEMMA re event history analysis, RLM re interviewing course). CASS offers advice to potential

participants prior to the course in relation to the type and level of course most appropriate.

- The desired audiences have been difficult to attract; e.g. one workshop designed for project managers attracted mainly PhD students (QUALITI)
- Good email distribution lists are important for publicising events. Both RLM and QUALITI have developed extensive email lists for publicising events. IN the case of QUALITI this list was generated via initial roadshows (see below)

2.3.1 Teaching and learning: course design and teaching styles

A range of issues in relation to teaching and learning were identified; many of these related to the design of course and the types of teaching styles adopted:

- There is a need for clarity about which students' needs are being addressed in designing courses and ensuring courses meet those needs (these might relate to: an overview of a specific method; an introduction; specific skills). (MRS)
- Rather than defining what presenters feel students need to know about an approach, it is more appropriate to agree student learning outcomes by prioritising the competencies most needed by a particular group of students and developing activities and assessments to meet these needs. (MRS)
- Making course material available in advance to give students the opportunity to look at it is viewed as helpful (BIAS)
- The importance of keeping course content to a reasonable size and not overloading students is noted (BIAS)
- Asking students to reflect on learning objectives at the end of the course and the extent to which their needs have been met is useful in informing course development (MRS, CASS)
- Adopting a critical and collaborative approach to teaching and learning has been identified as helpful in developing appropriate teaching and learning skills. MRS found developing learning objectives, activities and materials in small, multidisciplinary groups helpful. They also found formal deliberations of student feedback, consulting the educational literature and bringing in tutors to provide the team with various aspects of teaching and learning helpful in developing their own teaching and learning skills and enhancing the delivery of their courses. (MRS)
- The importance of providing a range of teaching and learning activities and sharing the control of learning amongst tutors and individuals or groups of students has been identified (MRS)
- Enabling practical engagement (CASS) and the ability to explore issues in relation to participants' specific concerns and/or data is valued by participants (RLM, LEMMA, BIAS, CASS). This might involve opportunities for participants to analyse their own data or to discuss issues relating to their own data, data collection or analysis. However this is demanding on tutors' time and it is necessary to ensure adequate tutors are available to meet participants' needs

2.3.2 Teaching and learning: blended learning

A number of Nodes have experimented with blended learning approaches, some of the issues emerging from this are:

- Blended learning has been used by MRS in relation to activities undertaken before attending a workshop. This has been seen as advantageous. Rather than running an intensive day course, students appear to prefer to undertake some activities before attending a workshop through an online virtual learning environment (VLE) and through reading and preparation activities via email. However, in order for this to work students need precise and detailed instructions about what needs doing and the expected timeframe. Students need to see that this component of the course is valued by staff and then they are likely to participate in it. MRS experienced good participation in the pre-course activities among their participants.
- In relation to post-course blended learning, people appear enthusiastic about a follow-up online course but LEMMA found that people progressively dropped out of engagement with it. Problems identified were lack of time in the work environment to participate and the open nature of these learning environments where other people

can see what individuals have posted. LEMMA recommend the following issues as important in VLE: i) ask people to commit a certain amount of time per week to follow up online, emphasising that without this they will be unlikely to develop the necessary skills; ii) insist they have data to be used in the online activities; iii) structure the face-to-face component of the course with more group work to build trust among members of the group so that participants feel safer when contributing to the online environment.

- Blended learning within an event is being trialed by LEMMA

2.3.3 Teaching and learning: online training systems (LEMMA)

Online training systems have been developed and are being evaluated by LEMMA; a number of issues emerge from their experience:

- It is important to ensure participants have the prerequisite knowledge – a quiz can be used for individuals to determine this.
- One of the problems encountered is that people are keen to get started with software before they have sufficient conceptual understanding. It is important to prepare materials where people are taught concepts prior to undertaking hands-on practice.
- It is important to ensure consistency and correct sequencing of materials (i.e. that people have the necessary underpinning statistical knowledge before moving on to more advanced levels of statistical analysis)
- There needs to be the facility for self-evaluation throughout – quizzes can be used throughout the material
- It is important to collect data to evaluate materials and inform future training initiatives; LEMMA collect basic user profile information on registration and quiz responses to identify where learners are experiencing problems
- Individuals learn best when they work with examples of applications relating to research questions from their own disciplines as they find this more engaging and easier to understand. LEMMA are working with participants who want to customise materials to particular subject disciplines

2.4 Practicalities

- Workshops involve a lot of organising and it is essential to have appropriate administrator time to assist with enquiries, bookings, arranging equipment etc. (All Nodes)
- Building in extra time in computer-based practical sessions is essential to allow for IT problems (MRS)

2.5 Post-course resources

- Participants value distance learning texts and workshop materials being made available from the website after the event (RLM, MRS, BIAS); this is also useful for people unable to attend an event (BIAS)
- Some courses offer post-course support (e.g., CASS) though take-up is limited. They have found that participants tend not to revisit course material after the event.

2.6 Impact

- Workshops need to be integrated with other forms of learning for course attendance to result in longer term impact (QUALITI)

3. Commissioned Workshops

LEMMA have been commissioned to run workshops by external organisations; these provide some opportunities for capacity building. Following on from one 3 day workshop they ran, they offered post-workshop support to the Head of Department and Departmental Statistician of 0.5 days per month with the aim of supporting these individuals who would then cascade knowledge to their colleagues. This seemed effective.

4. Seminars

A number of Nodes have run seminars. QUALITI have commented on their experience of these. Their seminars have been 1 day events located in various regions around the UK. The basic model of the seminars was to 'take stock' of four different issues that are central to

the work of QUALITI, to get leading experts from a range of disciplinary backgrounds to present their current thinking in these areas and then to invite the audience to discuss the presentations. The seminars were set up to be beneficial to QUALITI as well as participants so there was not charge for attendance. The attendance was good with many people from the QUALITI roadshows attending. An online discussion board was set up after each seminar so that participants could continue to contribute their views and thoughts on these issues.

Issues:

- The main strength of these seminars was their interdisciplinary nature
- Smaller invited audiences might have been preferable in order to develop the issues in more detail (and therefore be more valuable to QUALITI)
- The online discussion boards were underused; perhaps because of delays in setting them up or not offering incentives for people to post their views. There are also issues in relation to SPAM registrations and postings.

5. Resources

MLwiN user guides developed by LEMMA contain exemplar analyses and are written in a narrative style. These are a useful training resource for solo learners and for third parties running courses on multilevel modelling using MLwiN, thereby contributing to capacity building.

6. Placements

QUALITI have had 4 placements. Their placements are for a one week period and are provided at no cost to participants. Any social scientists are able to apply, submissions are then discussed in the team and with the applicant to assess whether their particular needs can be met within a placement. Applicants are sometimes directed to another source of training if this is viewed as more beneficial than a placement. Two placements are generally arranged together so that both participants can support each other. In general, various activities are planned for each participant comprising formal training and bespoke meetings. Members and associate members of QUALITI are asked to contribute to activities within placements. Placements seem to have been well received by participants.

Issues:

- It has been mainly new researchers who have applied for placements, from both the UK and overseas.
- It is important to be highly selective about who can participate
- The organisation of placements can be difficult in terms of timetabling meetings and activities with colleagues. However, QUALITI have found that in practice they don't need to identify as many activities for the visitor as they initially thought
- There appear to be numerous benefits to the placement scheme beyond the specific activities arranged – e.g., access to a well resourced library with methods journals, access to data and equipment and networking
- This is a high cost activity as QUALITI pays for participants' travel, accommodation and subsistence.
- The expense and demands on colleagues' time mean that only a relatively small number of placements can be accommodated

CASS has run a fellowship scheme which enables a researcher to work spend up to one month to work with colleagues in the School of Social Science. These are aimed at junior researchers/PhD students. The focus is the development of a research project or to provide researchers with support to extend an existing project. Additionally it is expected that individuals will contribute their knowledge/skills to assist in the delivery of one CASS course or to develop teaching materials.

Issues:

- It has been difficult to identify suitable applicants
- Matching skills and interests between applicants and staff is difficult
- Senior staff found it difficult to dedicate time to work with individuals

7. Roadshows

Qualiti organised a series of 6 regional roadshows at the beginning of their project in order to publicise the work of the Node (and NCRM more broadly) and to establish a network of social science researchers. The events were hosted via various social science departments around the UK. They were well attended (50+ participants at each). The roadshows were advertised via QUALITI and through networks known to the Node but local advertising was also important in tapping into local researchers. The events ran for 3 hours with basic refreshments. There was no charge for participants. A standard format was prepared for the roadshows which enabled anyone from the team to undertake the presentation. Roadshows appeared to be well received by participants. Participants completed evaluation forms and were asked to provide their contact details for future events; this proved an extremely useful way of building up a database of people with an interest in the work of the Node. The database of nearly 600 people which resulted from this activity has been extremely useful in providing a network for publicising future activities and for capacity building activities (e.g., distribution of QUALITI's newsletter).

Issues:

- Very useful activity for developing a network of researchers for future capacity building activities and establishing a dialogue with the research community.
- Avoiding formal booking for the session participants appeared to encourage wide and more informal participation.
- The people who assist in organising the event at the local level are important. The better attended sessions were those hosted by Faculty offices but this was dependent on the enthusiasm of the individuals involved.
- Holding events in different social science departments is important in terms of reaching out to a range of disciplines. Selecting particular disciplinary departments would be important to enable NCRM to access those who have been less involved with NCRM activities; e.g., psychologists, economists.

8. Journal/Newsletter

QUALITI publish a newsletter 'Qualitative Researcher' 3 times a year. It contains research articles and reports of methodological innovation. It also contains news from QUALITI including seminars, workshops and conferences. It is sent to key stakeholders as well as those on QUALITI's contact list (generated initially from the roadshows).

Issues:

- Useful vehicle for dissemination given methods journals are not routinely read by researchers
- Useful forum for alerting researchers to the work of QUALITI (and NCRM) so has a capacity building role

9. Commissioned Inquiries

QUALITI have undertaken Commissioned inquiries (CI) in order to take 'evidence' from the research community to produce a position piece on a chosen issue or topic. This is intended to contribute to capacity building. One CI has been undertaken and another one is in progress.

APPENDICES: REPORTS

'What works?' in training workshops: reflections on Real Life Methods TCB programme

Introduction

In line with the research programme of Real Life Methods, we have offered a diverse range of training workshops. Whilst we organise many events with training content, and participate in many others, the following notes refer to our core TCB programme of methods training workshops.

To date these have included workshops in the areas of: Visual Methods, Mixed Method Evaluation, Creative Interviewing, Qualitative Longitudinal Research, Geodemographics, Participatory Methods. Most of these were capped at 40 participants, and all were free of charge to participants (they were budgeted into our original funding bid)

Format

The format of the workshops has followed broadly similar lines, although with an exception to be discussed below. Evidence of what works well is drawn from the workshop evaluations, including open ended comments. Additionally we take as broad indications of success, the routine oversubscription of the workshops, word of mouth recommendations, and informal feedback.

Part of the success of the workshops lies, we believe, in the delivery of methodological expertise and resources, and workshop structures which encourage practical engagement, and which further encourage participants to bring to bear their own research and methodological challenges. Several of the training workshops have interleaved presentations / teaching to the whole group, with workshops (henceforward, mini-workshops; with up to say 10 participants in each). These mini-workshop groups are set tasks, and group discussion is facilitated by the organisers. The workshops are designed to advance engagement with methods in a fairly precise way, but are flexible enough to encompass diverse substantive issues which participants are researching. This combination allows many participants to explore the issues in relation to their own specific concerns. Feedback on the training events is very positive. The structure is seen very favourably and open ended comments confirm the value participants place on the format described.

There is some evidence that where mini workshops or practical tasks are even more closely tailored to individual research needs they are, unsurprisingly, particularly valued. For example, the training workshop on creative interviewing again provided a mix of training and practical sessions. These involved all participants conducting a practice interview (on a topic of their own choice) with a fellow participant. Some preparatory work was required of participants. Interviews were taped and transcribed and individual comment was made by the training provider and returned to participants after the session. There was also an on-line tutorial follow up with the training provider. Thus the event was very explicitly linked to, indeed built on, participants' own research needs and concerns. This was clearly very highly valued by participants, yet is also costly in terms of resources and time. This event was capped at 20 participants.

Other resources made available to participants

Additional resources for participants: papers and other workshop resources are made available through the RLM website. Although we do not have accurate data on the take up of this resource, participants frequently ask if they will have post training day access to copies of presentations for example, and it seems likely this resource is well used.

Administration

The majority of participants know of events through the website and email distribution lists although word of mouth is also important. We advertise workshops on the RLM website and the email newlist. It is clearly the case that there is a very high level of demand for these kinds of events. There has been a great deal of interest, and most workshops have been

significantly oversubscribed. We maintain a 'reserve list' so that if, and when, anyone withdraws we can immediately offer their place to the next in line.

In general participants are offered places on a 'first come' basis, except for the Creative Interviewing training workshop. Like other workshops this one was oversubscribed, but here applicants were prioritised according to how they described their particular research needs, as requested on their applications. This was in line with the central place in the event of a practical task, and the highly tailored nature of the day. The screening served its purpose very well, ensuring a close fit between participants' needs and the expressed aims of the training workshop.

The level of oversubscription and very high demand has been part of the context of the planning, and funding, of additional training initiatives, such as a successful bid for training in visual methods under the ESRC Researcher Development Initiative.

Location / mobile workshops

In line with a commitment to a regional / national spread in respect of where we locate workshops we have offered these in diverse venues. On the whole these have worked well. However, where these are not on familiar territory then we are subject to the occasional difficulties which arise in such circumstances (e.g. bad acoustics). Obviously first hand knowledge of venues (and, ideally, familiarity with running similar events in such venues) needs to be balanced against the value of maintaining a good, and evolving, UK regional spread of training events. [ESRC regional training centres tend not to be ideal for our purposes since we usually require conference style facilities, including breakout rooms].

Summary of what works:

Offering training in high demand areas; good website promotion of events; good contacts network, and email distribution lists; mixed format for training workshop including generic methods training combined with practical engagement in form of mini-workshops and exchanges around substantive and methodological issues confronting participants; efficient mechanisms for administering training workshops, both in-house and through knowledge of remote venues.

Sarah Irwin for Real Life Methods, Oct 2007.

Teaching strategies and lessons learnt

BIAS Node (Imperial College London)

Course:	One-day introductory course on Spatial Data Analysis with the R Programming Language
Date:	31 st August 2007
Venue:	Hynds Lab, St. Mary's Campus, Imperial College London
Instructor:	Prof. Roger Bivand and Dr. Virgilio Gómez-Rubio
Website:	http://www.bias-project.org.uk/ASDARcourse/
# attend:	30, with a waiting list of around 10 people.

Details:

The course introduced the analysis of spatial data with the R statistical software. Topics covered were import/export of spatial data and maps, geostatistics, point patterns, lattice data, disease mapping, small area estimation and others.

Teaching strategy:

The course was divided into 9 units, which were delivered in a computer lab. The attendants had all the materials (data and R scripts) to reproduce the slides and examples while the lecture was taking place. In addition, the attendants were encouraged to visit the main R web

site and post their questions on specific topics to the R-sig-geo mailing list after the course. In addition, a web page with all the course materials was set up at the Node web site.

Attend.'s feedback:

The course provided an overview of many different types of spatial data analysis. However, the amount of material delivered in the course was too much, specially for those not familiar with R.

The availability of examples, data and R scripts to reproduce the examples was highly positive for the students. Some of them reported that they would look at it later more carefully. There was no time slot for the attendants to spend with the computers on their own. Some mentioned that they would have liked to spend some more time looking at the course materials and ask questions to the instructors.

Lessons learnt:

- Keep course content to a reasonable size.
- Participants particularly welcomed having materials (data & code) to reproduce the examples.
- Give time to the attendants to have some hands on practicals.
- By having the materials on a web, the course was made available to other people that could not attend. However, it would be useful to make materials available to participants *in advance* of the actual course.

Course:	One-day course on the Dissemination of Results of Research with the R programming language
Date:	15th November 2007
Venue:	John Nelder Lab, Department of Mathematics and Statistics, Lancaster University, Lancaster
Instructor:	Dr. Virgilio Gómez-Rubio
Website:	http://www.bias-project.org.uk/Rpackages_course
# attend:	18, with a waiting list of around 5 people.

Details:

The course was jointly organised between the BIAS and the Lancaster-Warwick nodes. It was aimed at Ph.D. students and postdocs, but a few lecturers joined the course as well. The course focused on how statistical methods and research could be disseminated using the R programming language. The course covered the main topics on how to create R packages, including how computer code can be distributed to other researchers (specially, with a non-statistical background), develop manual pages and provide high quality documentation and training materials.

Teaching strategy:

The course was divided in 2 lectures to introduce the main topics plus 3 practicals where the attendants were supposed to develop a package based on a simple example. This included writing the computer code, manual pages and high quality documentation with examples and plots to illustrate the use of the software and statistical methodology. A web site with the course materials was set up to provide the main course materials and examples.

Attend.'s feedback:

In general, the feedback was very positive. Some complained about specific issues on the slides (typos and ideas that could be explained better) that will be fixed in the course materials.

Some steps should be explained more clearly, specially those with very technical details (for example, how to compress and uncompress files in the Linux operating system).

Lessons learnt:

- The course is very useful to this type of audience
- The course materials should be checked in order to avoid typos that can lead to an incorrect execution of the practicals.
- The course will be repeated at Imperial College London

Reflections on LEMMA Training

In this document we describe how our training programme, methods and ideas about training have evolved over the period of the NCRM project and point to future developments. Here we describe our NCRM training activities (and occasionally refer to other non-NCRM training activity).

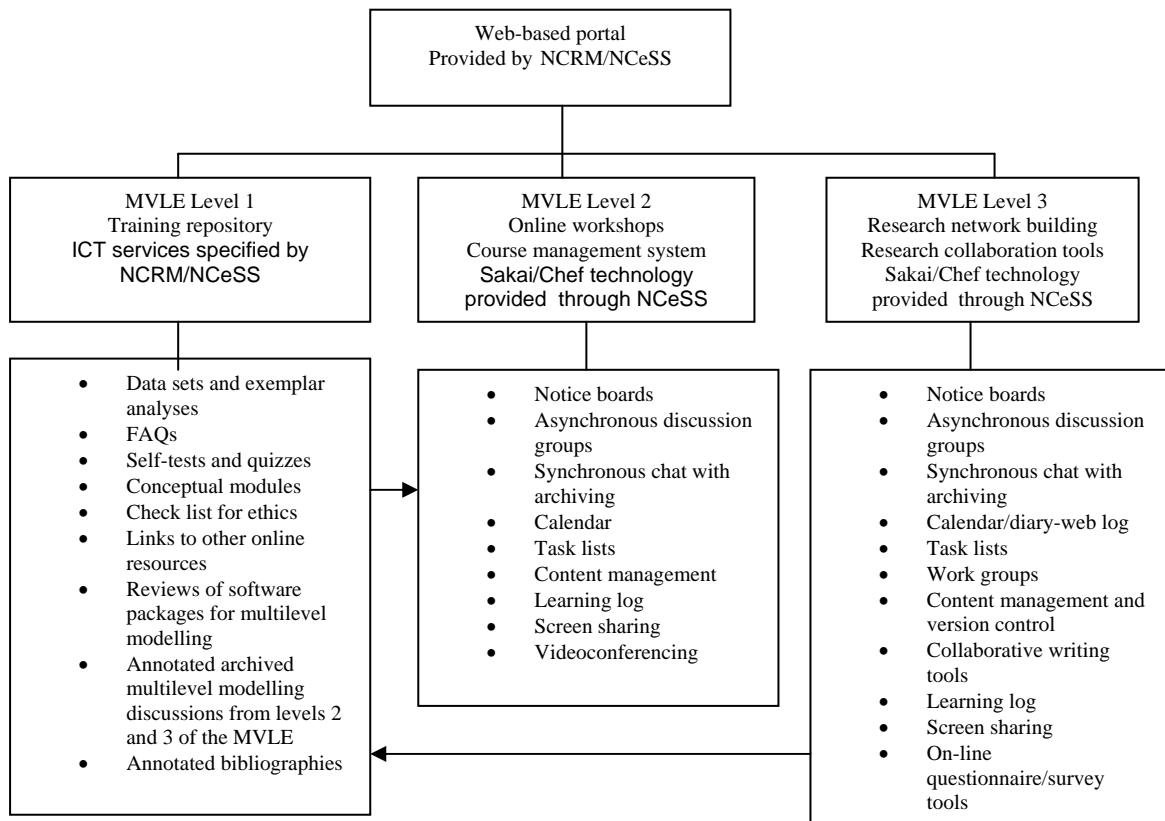
1. Original plan

In the original proposal we planned a mixture of

- awareness raising face to face workshops
- 3 day introductory face to face workshops
- face to face workshops with follow up on line mentored learning groups

All the workshops were on the theory and practice of multilevel modelling. Furthermore we planned to build a multilevel Virtual Learning Environment (VLE). The following diagram is from the original proposal that described the “learning architecture” of the VLE.

=====section from proposal=====



The proposed ICT architecture as shown maps onto the pedagogical design for the whole system. This anticipates 3 levels of activity, which feed into each other:

- *Level 1: Repository of Training Materials*
This is essentially a database of teaching and learning materials which can be used by solo learners or tutors for delivering their own training.
- *Level 2: Online Workshops*
Moderators use materials provided in Level 1 to facilitate group learning in online courses. These are designed to promote online group formation which will be carried through into level 3 after the end of formal teaching.
- *Level 3: Online Research Communities*
This forms the core of collaborative knowledge building in intensely focused groups. Computer-supported, collaborative work-tools will be used to help form and sustain online networks. It is anticipated that some of the outputs of these networked activities will result in learning objects being deposited in MVLE Level 1 such as new exemplars and annotated archived discussions.

2. Problems with the original plan

We involved an ICT/online learning expert, who was influential in arriving at the above ICT architecture, which was based on what has worked elsewhere. Once we started to try and operationalise the system, however, it quickly became apparent that there was a flaw in the conceptual design. The idea was to build a repository of the many existing training materials developed by us and colleagues. The materials would be stored on a database, and tagged with meta-data so that the materials could be retrieved by meaningful keyword searches. The problem was that the existing learning materials used different notations, styles, frameworks and layouts. Courses built on mixtures of these materials would lack coherence. We also realised the key social science users we are targeting did not need access to a wide range of disparate materials; they needed a ladder of consistent, highly sequenced, carefully constructed materials. Therefore we realised we would have to redesign level 1 of the system (as outlined in Section 4 below).

We then trialed a blended workshop. This was really about getting a feel for level 2 of the proposed system. Rather than being totally on-line, we went for a 'blended' workshop which began with a 3-day face-to-face workshop with a mixture of theory and practical sessions using *MIwiN*. However, there was no opportunity for participants to analyse their own data. Support would be provided for participants to analyse their own data in the mentored on-line follow up. We used *Groove* run the on-line follow up: this is an online office system that allows shared documents, discussions lists, text and voice chat amongst other features. We created a virtual workspace that included a file repository for sharing files and to which the teachers posted files relating to a set of activities (learning tasks). There were four activities: 1) finding your way around the learning environment, 2) stating your research question and describing your data, 3) Getting your data into *MIwiN*, and 4) starting to fit multilevel models and interpreting results. There was a separate discussion area for each activity.

At the end of the face-to-face workshop enthusiasm among the participants for the online course was high. However the results were disappointing:

28 participants at the face-to-face workshop
12 participants joined the on-line workspace
12 completed activity 1 (registering, finding way around + posting a message)
6 completed activity 2 (discussing research question and data)
4 completed activity 3 (getting data in)
3 active at end of 6 week course (modelling and interpretation)
We subsequently conducted a telephone follow up of the thirty participants. We found that many people, although initially enthusiastic, were deluged with other tasks when they

returned to their work environment. Also the very open and exposing nature of such learning environments – where everybody reads your posts and participants are encouraged to discuss work in progress – was intimidating for many participants.

It is probably fair to say that the participants, with a few exceptions, did not learn very much from the on-line learning environment. However, the instructors learned a great deal. We did not run any further online mentored workshops, mainly because the drive for this had come from our ICT consultant who left the project due to other pressures. If we were to try this approach again we would make three important changes. First, we would ask people to commit a certain amount of time per week to the follow up online learning period, emphasising the point that participants who are unable to make this commitment will be unlikely to reach the point of “take off”, that is applying multilevel models to their own data to produce publication quality research. Second, we would insist they have a data set that was ready for multilevel analysis. Third, we would restructure the face-to-face component of the workshop with much more group work; this might build trust among members of the group so that participants felt safer when contributing to the online environment.

Another side-effect of the ICT consultant leaving was that our practical commitment to evaluation, via follow up of our training programme, weakened. This is, however, a point we are addressing in our NCRM phase II work.

3. Other training materials and workshops

Software manuals

The two MLwiN user guides contain 500 pages of detailed exemplar analyses. These manuals have a narrative style. They explain the statistical models in detail and, for each type of model, work through a detailed analysis, interpreting the results. In this sense they are really books rather than reference manuals. As such they are a useful training resource for solo learners and for third parties running multilevel modelling workshops using *MLwiN*.

1 day awareness raising workshop

In these workshops, we explain why multilevel analysis is useful and go through some exemplar analyses. They contain some core material, but are tailored to the particular group of participants.

2.5 day introductory workshop (30 participants, 2 instructors)

There is no analysis of participants' data in this type of workshop. Therefore teachers can handle a class of up to 30 students, giving a reasonably satisfactory experience for students and teachers. The format for this workshop is a theory session, followed by a practical session using the *MLwiN* software. Every pair of sessions is concluded with a recap/summary discussion with the group, going over the main points covered in the session. We are increasingly cutting down the amount of material we cover in this workshop. In previous years we also allowed participants to analyse their own data in the three-day workshop, but this was too high a load on the teachers and the participants. We have recently added the five-day workshop below which includes time and support for analysis of participants' own data.

5 day introductory workshop with analysis of participants' data (20 participants, 5 instructors)

For this workshop participants need to have a data set to analyse, where multilevel modelling seems appropriate. The workshop covers the same ground as the 2.5 day introductory workshop, except that half of the time is allocated to the analysis of the participants' data. For the sessions in common with the 2.5 day introductory workshop, two instructors are required. Five instructors are required for the sessions during which participants analyse their own data. We also start this workshop with a group session in which we discuss each participant's research question and the structure of their data. On day two, after covering some introductory theory and practice, we have another session in which we discuss how participants will apply multilevel analysis to their particular data to explore their research question(s). At the end of the workshop, a selection of participants present the findings from their analyses. This workshop is very demanding in terms of instructor time.

Specialist workshops on event history analysis

We have run 3 two-day workshops on multilevel event history analysis. Because of the specialised nature of these workshops, applicants are asked to state why they feel they need training in this area and to give a brief description of their research question. This application procedure helps to select a group of motivated participants with an event history application in mind. We find, for example, that some applicants do not understand the purpose of event history analysis and are actually looking for training in time series analysis or panel data analysis. The workshops are kept to a small group, with only 15 participants and one instructor. Although there is not enough time for participants to analyse their own data, there is time during practical sessions to discuss their research with the instructor.

3 day workshops for exiting groups

We are often asked by external organisations to run training workshops. These workshops have the advantage that all participants know each other and work in the same subject area, and there is therefore a strong possibility that the group can support each other after the workshop. Also, it is usually a senior member of staff who has requested the workshop and they are prepared to allow time, space and support for group members to develop their expertise after the workshop. As an experiment we ran a 3 day workshop for the Department of Psychology at the University of Aberdeen.. We offered a post-workshop support service to the head of department and departmental statistician of 0.5 day per month, the intention being that we support two key people who will then cascade knowledge to their colleagues. It turned out that far less than 0.5 day per month was required, probably only 1.5 days per year. Although progress was initially slow, now a group of 5 researchers in the department are routinely using *MLwiN*, in their research, with papers, a PHD thesis and a grant application now in preparation all using multilevel modelling and *MLwiN*.

4. Online training system

As mentioned previously, we realised at an early stage of the project that the materials in our online learning system need to be consistent (in terms notation, conceptual framework and layout) and carefully sequenced (for example, you cannot learn multilevel modelling unless you understand multiple regression). The materials are housed in Moodle (a package for building web-based learning systems) and has the following basic design principles:

- Accessible to anyone with a basic statistics training (up to simple regression)
- Modules to have two integrated components: concepts and practice
- Facility for learner's self-evaluation
- Pre-requisite quiz, and regular quizzes throughout the materials
- Collect data to evaluate materials and inform future training initiatives
 - Basic user profile information collected on registration
 - Quiz responses, webstats on patterns of use Design materials so they can be easily modified by other trainers

The clear separation between concepts and practice will, we hope, make the system more easily extendable. The 'practice' component goes through, in detail, the analysis of a particular data set with *MLwiN* using the modelling techniques described in the 'concepts' component of the module. The system can be extended by adding further practical examples analysing data sets from different subject areas. The advantage of separating out concepts and practice means that the module writer does not have to go over the basic concepts again and can focus instead on interpretation of the models in the context of subject domain-specific research questions. We know that learners often experience difficulty in generalising from one context to another and tend to learn best when example applications of the statistical techniques are based around data sets and research questions from their own discipline. Practical modules using other (than *MLwiN*) analysis software can be added, again leveraging the concepts module which is not bound to any particular software package.

The participant's responses to the quizzes are recorded on a central data base. Analysing these responses will allow us to see where learners are having difficulties and therefore which areas of the materials require improvement.

The first release of the system will go live in January 2008 and will contain the following modules:

1. Types of variable
2. Introduction to statistical modelling
3. Multiple regression (single-level)
4. Data structures
5. Multilevel modelling of continuous data

with the following modules to be added by September 2008

6. Logistic regression (single-level)
7. Multilevel logistic regression

and further modules planned thereafter.

5. Future considerations

We are currently planning how best to integrate our new online materials with our face-to-face workshops. Outside of NCRM workshops, we have tried another strategy that seems to work well for introductory workshops. This is to have a concepts/theory session, followed by a hands-on illustrative data analysis using *MlwiN* led by the instructor using a data projector with students following on their PCs. There is lots of scope for discussion and interpretation; the users are given detailed scripts and explanations for this analysis session. They are then given another data set from a different subject area but with the same structure as the exemplar data set analysed in the group session. Next, they are given a series of research questions which, in modelling terms, corresponds to the group worked example but from a different subject area. For example, we might switch from an example with students within schools to an example where children are nested within families. Questions might include: "Do schools moderate learning?" and "Do families moderate behaviour?". This exercise of translating from the original analysis script to another problem with same structure but a different context (in a structural sense all that has happened is the variable names have changed), seems to be very helpful for students to grasp the generality of the methods. We are thinking of using this strategy for our future workshops, perhaps using the online learning system exemplars for group work and the software manual exemplar analyses for the "now have a go on your own" exercise.

Another theme that continues to emerge from our NCRM and other training is that people are keen to get started with software before having sufficient conceptual understanding of multilevel modelling. They then end up trying to sort out statistical concepts and learn a new software package at the same time and this can be too heavy a cognitive load. Clearly, experimenting with modelling software can be a useful learning experience to elucidate statistical concepts. However it is important to cover some basic conceptual ground first. This includes types of research question that multilevel modelling can illuminate and different types of multilevel data structures that exist. This is another reason for the split between concepts and practice modules in the online training materials and we will be mindful of this issue when redesigning our workshop structure.

There is a high demand for workshop materials where the data sets and research questions come from the participants' own substantive areas. Participants find these materials more engaging and also easier to understand. We have recently begun offering support to participants (and other researchers) who are themselves interested in going on to customise our materials to particular subject disciplines. In the NCRM phase II we will formalise and extend this "training the trainers" approach. Our extendable on-line architecture will then be ready to accommodate modules written by other researchers and we will select a small number of committed researchers and support them in this process.

Finally, our NCRM phase II work will have a greater focus on evaluating our training materials. This will be achieved by analysing the responses to quizzes in the online learning environment and follow up interviews of users of our training programme, to see the extent to which they have adopted multilevel modelling as a research tool.

Jon Rasbash
Fiona Steele

Reflections on teaching from the NCRM Methods for Research Synthesis node

Rebecca Rees, November 2007

The Methods for Research Synthesis node follows several general approaches in its teaching, as well as using a wide variety of teaching strategies (Tables 1 and 2 overleaf). Our 'lessons learned', from tutor reflections on experiences and from student evaluations, include the following:

- i. **Need for clarity about which student needs are being addressed.** Table 3 overleaf presents some of the ways in which we've found that students vary. Variation in need for substantive learning, in particular, impacts fundamentally on course design (see point ii below).
- ii. **Need for a student-centred basis for course design.** To help our courses be 'fit for purpose' we start by agreeing on 'student learning outcomes' (see Table 1). To do this we have had first to identify the full range of competencies related to systematic reviewing and evidence informed policy and practice that students might be seeking. The next stage is to prioritise the competencies most needed by a particular group of students. Each course's learning outcomes are then used as a focus when developing activities and assessment exercises, with tutors asking themselves, 'will this activity/assignment actually help these students achieve one or more of these outcomes?'

Challenges to this approach for our team include the difficulty of setting aside a researcher perspective (thinking in terms of research topics or methods that should be covered) to think, instead, in terms of the different kinds of learning that students might need. Clear learning objectives, however, have also helped us evaluate and develop our courses and are useful for team teaching. For example, we ask students to reflect on our advertised learning objectives (see below) at the course end and to tell us the extent to which they feel the objectives were met. We also present our learning objectives at the start of courses and ask students to reflect on and tell us about any additional needs that they feel they have. Course tutors are able to remind themselves of the learning objectives when preparing to deliver course materials.

- iii. **Providing a range of teaching and learning strategies.** Experiences and research about adult learning emphasise the importance of varying activities and sharing the control of learning amongst tutors and individuals or groups of students¹. All of our courses have been designed so as to contain at least two of the strategies described in Table 2. We have applied the first six strategies most frequently. The strategies further down in the table have been used mainly in whole-day workshops or workshop series, where there is sufficient time to physically switch into and out of different kinds of activity and to feed back learning to the whole class.

Students have particularly appreciated mixtures of lecturing, question and answer sessions and group-discussion or case study. We have found, in line with others, that activities managed by students need to be carefully structured (again using learning objectives). They also need to be focused around some kind of output that is then acknowledged and used further in some way (e.g. whole class discussion or further activity).

Our programme of teaching and capacity building has also involved the production of website-based text about research methods synthesis, other distance-learning texts, and

¹ E.g. Burge, E.J. (1988). Beyond andragogy: Some explorations for distance learning design. *Journal of Distance Education*, 3(1), 5-23.

Bullen, M. (1998). Participation and critical thinking in online university distance education. *Journal of Distance Education*, 13(2), 1 ± 32.

includes plans for a text book. These serve as a vehicle for communicating the findings of the MRS node's research work, as well as supplementary materials for learning and teaching within courses.

iv. **Making optimal use of face-to-face time / different venues and times for learning.**

Our day workshops were initially provided over eight-hours, but we received clear feedback from students and tutors that this was too long a day. Simply shortening the day put pressure on students' learning. To address this we have now redesigned several of our courses so that some activities are done by students before they attend workshops (or between workshops if these are taken as a series). This has been done both by providing learning through an online virtual learning environment and through the provision of reading and preparation activities by email.

For example, working as part of an initiative run by the Institute for Education², we have redesigned our four day series of workshops, 'Research synthesis for policy and practice', so that all activities for individual students (e.g. all reading and note-taking, practical exercises using web-based software) and some group work (e.g. sharing of experiences of describing key aspects of primary research studies) are done outside of workshop time. This has also meant that some workshop time is freed up to ensure students can clarify key concepts with tutors. We have used the Blackboard online virtual learning environment to support individual work, group discussions and communication. Our work to apply this model of learning - blending face-to-face with distance work using on-line tools - has been supported by outputs from various case studies and other research projects³.

We have found that this type of course delivery requires careful attention to communication and timing and, again, a focus on specific outputs. Students need precise and detailed instructions on what needs doing, by when, so that their work can be accessed and followed up (sometimes by fellow students, sometimes by tutors). If students see that their work at a distance is an important component of the course, it is argued, they will participate. Online access to activities can sometimes also enable students to have more control over when they learn. Online participation rates in our first run of our re-designed course of workshops and on-line activities have been high. Students, many of whom are in full-time work, have also been working on-line at all hours of the day and night.

v. **Expecting the unexpected.** In computer-based practical sessions, in particular, we have found that something unexpected always happens (e.g. malfunctioning of software, internet connections and log-ins, invasion of computer rooms by other peoples' students), and this can be a huge source of lost teaching time.

We have found it vital to add on extra contingency time when planning such sessions, and to have additional staff on hand to problem-solve while tutors continue work with students.

vi. **The value of administration.** We have found that courses have a considerable administrative impact if they are to be run well. Student enquiries, bookings and support, the arrangement of venues, catering, course materials, computer services and audio-visual aids, marketing, the collection and collation of student and event-related data, all take time and require input from people with management, people and system development skills.

² Jara M and Mellor H (2007). *HEA E-Learning Pathfinder Pilot Project. From Pedagogic Research to Embedded E-Learning. PREEL*. London: Institute of Education. Accessed 14th November 2007 from http://www.lkl.ac.uk/ltu/files/preel.researchreview_240307_final.pdf

³ Jara M and Mohamad F (2007) *Pedagogical templates for e-learning. WLE Occasional papers in work-based learning - 2*. London: Institute of Education. Accessed 14th November 2007 from http://www.lkl.ac.uk/research/benchmarking/wp-content/uploads/wle_op2.pdf

- vii. **Team teaching (collaboration and co-operation).** We have developed a programme of teaching that appears to mirror the ways that we work as researchers on systematic reviews. Systematic reviewers aim to develop knowledge through constructive criticism of existing research. Systematic approaches to synthesis ideally involve the collaboration of people with different perspectives, so that these perspectives can bring light to bear on the complexity of the topic under study. Systematic reviews depend on team-work, with reviewers sometimes working alongside each other to examine the same study, at other times applying tools created by colleagues or appraising colleagues' work for quality assurance purposes.

In our teaching we have developed learning objectives, activities and materials for the NCRM programme in small, multidisciplinary groups and have explored pair teaching and peer observation methods⁴ for the development of our own teaching skills. At other times, work has had to be more co-operative in nature, with tutors working with course designs and materials that have been developed by others and feeding back their comments on how this went. We have carried out formal deliberations of student feedback in committee meetings, consulted the educational research literature, and brought in tutors from other bodies to provide training on various aspects of learning and teaching. In the process we have not only learned about methods for learning and teaching research methods, but have also expanded our understanding of the substantive field of research synthesis itself.

⁴ Askew S (2004) Learning about teaching through reflective collaborative enquiry and observation. *Learning Matters*, London: Institute of Education.

Table 1. Main teaching approaches

Teaching approach	Examples of approach in action
Focus on 'student learning outcomes' ⁵	<ul style="list-style-type: none"> • Starts from the perspective of students and asks 'what skills, knowledge and/or understanding do we want students to be able to take away from this course?' • Frames the course in terms of level of competency. In terms of cognitive outcomes, the course might try solely to provide students with knowledge or comprehension. More challenging outcomes would include student ability in application, analysis, synthesis or evaluation of a methods topic. • Tends to be more specific and practical than course aims. E.g. our course 'Research synthesis for policy and practice' aims include, to 'explore key arguments about the purposes, methods and relevance of research synthesis'. The course's student learning outcomes include 'having a critical understanding of the purpose of systematic research synthesis' and being able to 'identify a diversity of approaches to synthesis along with principles and decision points central to all'.
Encouraging students to diagnose their own needs for learning	<ul style="list-style-type: none"> • Tutors present advertised course learning objectives at the course start but also ask students to identify specific areas that they feel they need to address • Tutors may then target these areas in the course, or may direct students to additional resources
Acknowledging and making use of students' existing expertise and experience	<ul style="list-style-type: none"> • On-line 'hello' forum for students to introduce themselves and their experience/interests (can also free up time and improve communication at start of courses – several students used this space to identify opportunities for research collaboration) • Students working in pairs as 'critical friends' (commenting on each others' draft work during class and on-line activities) • Explicitly targeting advertisements for certain courses at practitioners, and other decision-makers who may have limited research expertise, but, e.g. want to bring knowledge about synthesis methods into their workplace. These students help ensure that course discussions consider the relevance of research to people outside academia.
Problem based learning / giving students opportunities to reflect on own experience	<ul style="list-style-type: none"> • Activities where students apply learning to own substantive research area (e.g. individual students draft and revise their own systematic review questions and methods protocols) • Individual and group work that allows students to recognise and consolidate what an experience (existing and/or provided as part of our program) has taught them, and also leads them to identify what else they need to learn and practice (e.g. 'so what?' discussions at the end of teaching sessions; 'think aloud' fora in on-line discussion spaces)
Team teaching (collaboration and co-operation) ⁶	Tutors collaborate (critically review each others' work and jointly develop solutions) to, e.g.:

⁵ Keeton MT, Sheckley BG and Griggs JK (2002). *Effectiveness and efficiency in higher education for adults: A guide for fostering learning*. Dubuque, Iowa: Kendall Hunt

	<ul style="list-style-type: none">• develop course learning objectives, design strategies to be used and course materials;• learn about teaching practice in tailored workshops;• evaluate teaching practice (using student and tutor reflections, peer observation). <p>Tutors co-operate (share tasks in working towards an undisputed end) to, e.g.:</p> <ul style="list-style-type: none">• Familiarise themselves with course and session learning objectives;• deliver pre-designed teaching sessions (strategies and materials).
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⁶ Benjamin J (2000) The scholarship of teaching in teams. *Higher Education Research and Development* 19: 191-204.

Table 2. Teaching strategies

Teaching strategy	Consists of
Lectures	One way communication by the tutor with no feedback from student.
Question and Answer	Tutor-centred interaction with the students
Group Discussion	A network of interaction between students with the tutor setting the discussion but subsequently playing only a minor role
Practical	Real or simulated situations with students learning from experience
Case Study	The examination of a real or simulated situation so that learning can take place through the discussion of each of its facets
Individual Learning	Situations where students work alone with books, equipment and other resources
Tutorial	Interaction between the teacher and one or a small group of students providing opportunity for guidance and support
Demonstration	Teacher shows the basic steps and sequence of a skill, or the main attributes of a concept with students watching
Seminar	Students either individually or in small groups are set a task to research and from which they report their findings to the whole group and lead a subsequent discussion
Role Play	Students are invited to enact, or imagine, a role that they, or others, may take in the production or use of research
Project	A task where research objectives are laid down by the teacher, but the student decides how they will meet these objectives. Has an end product, often in report form.
Assignment	Similar to a project, but usually of shorter duration.
Problem Solving	Teacher sets a problem which students solve either individually or in groups

Table 3. Variation in student needs

<p>1) Substantive learning – seeking one or more of the following:</p> <ul style="list-style-type: none"> a. familiarisation with research synthesis approaches; b. specific research synthesis skills; c. a more critical understanding of synthesis methods and their context (including study of methodological and philosophical issues). <p>2) Entry level – e.g.</p> <ul style="list-style-type: none"> a. Introductory - having experience in research but little or no experience in research synthesis; b. Advanced - having knowledge and skills in research synthesis but wanting more specialist research synthesis skills or a means of reflecting more critically on synthesis methods. <p>3) Practical needs – e.g. seeking courses that fit into full-time study, vs. courses that can be taken while fulfilling work and other commitments</p>

⁷ Categories and descriptions adapted from Reece I and Walker S (2007) *Teaching, training and learning: a practical guide. 6th Edition revised*. Tyne and Wear: Business Education Publishers Limited.

Review of QUALITI Capacity Building Activities 2005-07

Chris Taylor, Cardiff University School of Social Sciences

7th August 2007 (an earlier version was circulated to the NCRM in 2006)

QUALITI has organised six main kinds of capacity-building activities during 2005-06 and 2006-07:

- Roadshows
- Seminars
- Journal/Newsletter
- Commissioned Inquiries
- Placements
- Workshops

The key features of these six kinds of activities that may be useful to share with NCRM colleagues are as follows:

Roadshows

- Organised on a regional basis around UK – 6 in total
- Three-hours long with just basic refreshments (some before lunch and some after lunch – those before lunch were generally better I think)
- All run in October, November and December 2005
- Designed to present the aims of the Node and to establish a dialogue with the ‘user’ community of social science researchers about process and content of our future capacity-building activities
- Held in and/or hosted by different social science departments (to encourage multi-disciplinary audience during the course of the roadshows. In practice each audience was relatively interdisciplinary despite which disciplinary department was hosting the roadshow. Selecting particular disciplinary departments would have been beneficial in order to attract more ‘peripheral’ social science researchers in economics, psychology, linguistics and health studies
- The format and content of the session was transported to each venue (hence ‘roadshow’) although we did develop and fine-tune our presentations over time. Having a standard format reduced the amount of preparatory work we had to do and allowed anyone from the QUALITI team to take the roadshow presentations ‘off the shelf’ in order to share the workload of doing 6 seminars in three months
- We did include an introduction to the NCRM, the Hub and its associated Nodes (packs also included all NCRM fliers)
- We invited those interested in attending to let us know but there were no formal bookings taken. This was designed to encourage wide and more informal participation, and to a large extent this was successful given the more basic aims of the roadshows
- Attendance at these roadshows was free
- We did encourage all participants to complete evaluation forms and to fill in their contact details for future events (this was a good way of building a substantial network for publicising future activities to nearly 600 social science researchers)
- There were no costs incurred for rooms etc
- Most roadshows attracted more than 50 participants
- Hosts (the HEIs/departments) helped book rooms and refreshments and to advertise the event locally, but we also advertised these on our website and through existing networks
- Many hosts were individual departments or research units. The better attended sessions were hosted by Faculty offices (although this can be hit and miss with availability and enthusiasm of staff to assist in the organisation of sessions)
- Roadshows were generally well received by participants, and there seemed to be genuine enthusiasm for having visited ‘their corner of the world!’ Particularly by an ESRC initiative....

Spring Seminars

- Six day-long seminars organised

- Located in different regions of the UK
- All included invited speakers and discussants
- Basic model of the seminars was to 'take stock' of four different issues that are central to the work of QUALITI, to get leading experts from a range of disciplinary backgrounds to present their current thinking in these areas and then to invite the audience to discuss the presentations. In practice some of the issues pursued required more thought into how to get the discussions to generate more useful material and guidance to us (perhaps through small break-out groups)
- On reflection to me the main strength of the seminars were their interdisciplinary focus – there seem to have been few other opportunities for such dialogue on what can be generic methodological issues (and even where they are perhaps not generic it is interesting to see how they do differ by disciplinary or theoretical perspective)
- Because these seminars were as much beneficial to QUALITI as to the participants we did not charge for attendance. These seemed quite distinct from workshops or dissemination activities of our own where we would charge for attendance.
- Formal bookings were taken and standard NCRM evaluation forms used
- Refreshments and lunch were provided (at cost to QUALITI). There were no costs incurred for rooms etc.
- We found that many people from our roadshows attended the seminars (this helps keep a dialogue going, but does perhaps indicate that we may only be talking to a particular sub-group of the social science community of researchers)
- After each seminar the QUALITI team wrote a report on the seminar, including our reflections on the day and what may need pursuing further in the next two years
- All seminars attracted over 40 delegates
- I think in retrospect I would have preferred smaller, invited, audiences in order to develop the issues in more detail (and therefore be of more value to QUALITI). However, such an approach would seem at odds with our other objective of reaching 'far and wide'. Despite these reservations and the benefit to QUALITI the seminars were well received by delegates
- After each seminar we set up online discussion boards so that participants could continue to offer their views and thoughts on these issues. All participants were emailed shortly afterwards to remind them of this. However, this has been a resounding failure! This may be due to delays in setting up the discussion boards or not offering greater incentives to post. But we will continue to keep the boards open (as they fit our overarching objectives) and try alternative ways of encouraging online discussion (from our perspective this has proved very difficult to manage because of SPAM registrations and postings – to which the best solution is to 'close' the discussion boards, which in turn perhaps makes it harder for researchers to contribute to the discussion)

Journal/newsletter

- This publication, Qualitative Researcher, is published every four months (three times a year)
- It contains three kinds of articles: contributions in the form of opinion pieces and polemics that stimulate debate; brief articles presenting current empirical research projects; and reports of instances of methodological innovation (all around the themes of QUALITI)
- Each issue is 12 pages (although more can be added) with about 4 articles in each
- Papers are relatively short (no more than 2,000 words) designed to encourage a high turnover of articles
- Most articles are commissioned or invited, although as more issues have been published we are beginning to receive unsolicited papers
- Articles are 'lightly' peer reviewed
- It also contains news from QUALITI, including our activities and other relevant seminars, workshops or conferences that we think its audience would be interested in
- Current publication is for 600 copies (our contacts lists are asked to opt in or out of receiving the journal), although we send copy to key stakeholders as a matter of course (whether they want it or not!)
- It is also available electronically from the QUALITI website

- This provides a useful vehicle for dissemination, largely because of its interdisciplinary audience and because we believe methods journals are not routinely checked/read.
- It is also a useful forum to alert researchers to our work (research and capacity-building activities)
- The journal is free to researchers, but we have a limit on copy size (the electronic version will alleviate this problem)

Commissioned Inquiries (CIs)

- We have one completed CI (on the risk and well-being of doing qualitative research) and one currently underway (impact of qualitative research in policy-making)
- The basic premise of these CIs is to take 'evidence' or experiences and produce some position piece or material on a chosen issue or topic.
- We commissioned someone from outside QUALITI to lead on the first CI (although the original plan was to commission a panel of researchers/stakeholders) and the QUALITI team are taking a lead on the second.
- The first CI has also been run electronically using discussion boards. The second CI will be based solely on background research and face-to-face meetings
- The objectives and outcomes of the first CI were agreed with the lead person (from outside QUALITI). They have been paid a basic honorarium for leading this. Other costs incurred are for occasional meetings although this has been reduced by using the electronic forum
- QUALITI provide the secretariat and researcher time to compile the 'evidence' and help produce the agreed outputs
- This particular CI has become labour intensive to the researcher involved as it has verged more on the side of being a research project than an inquiry
- QUALITI is purposely running the second CI differently to the first in order to try alternative methods in running them
- We also aim to write more on this form of capacity-building activity

Placements

- To date we have run four placements, and two others have been arranged
- This is for a week's placement or visit to the QUALITI team by other social science researchers
- We encourage anyone to apply. These submissions of interest are then discussed within the team and with the applicant, in relation to their needs and what we can organise during their placement
- We either agree to the placement or direct the applicant to another source of training that we think would be more beneficial (so in effect this becomes a form of mentoring)
- We have three types of placements with varying degrees of formal training and bespoke meetings
- There are a finite number of placements we can afford over the three years
- Members and associate members of QUALITI are asked to contribute to the placement
- It has been mainly new researchers who have requested this kind of support, but has included international researchers as well as UK researchers.
- This is a high-cost activity since QUALITI pays for their travel, accommodation and subsistence while they are here in Cardiff
- Placements usually involve two visitors at a time (there are some benefits of mutual support)
- Placements are free to visitors, but we are highly selective over who can participate
- We have found that there are numerous benefits to the placement scheme beyond the programme of activities that we arrange – e.g. access to a well-supported library with most qualitative methods journals, access to data and ICT equipment for 'experimenting', and for networking.
- The placement we have already hosted was extremely well received. The organisation of the placement can be difficult (due to timetabling meetings and activities with as many colleagues/experts as possible) but we found that in practice

we did not need to provide as many 'things to do' for the visitor as we had initially thought

- We plan to fully cost the placement scheme and write about this form of capacity-building activity

Workshops

- In the past year QUALITI has designed and run three workshops based on the methodological work of the Node.
- Each has been run in different parts of the UK and will be repeated in different venues for 07-8
- The basic premise was to design 'state of the art' workshops in three different areas (use of IT in qualitative data collection, ethics and qualitative research, and multimodal/media qualitative research)
- Two of the workshops were one-day and the other was a two-day workshop
- All workshops were booked up, although they were necessarily small in size
- These have generally been well received but the quality of the workshop resource could be improved (hence the decision to repeat them)
- The desired audiences have been difficult to attract. For example, one workshop is designed for project managers but mainly attracted PhD research students
- These face-to-face workshops have been difficult to organise/deliver for mainly two reasons: (1) the technological requirements of the workshop and the use of ESRC Regional Training Centres (hence the decision to run the two-day workshop in Cardiff next time); and (2) we have not fully integrated these workshops with other forms of learning that we may employ, hence participants have found them immediately useful but in terms of a medium to long term impact these workshops are currently very limited. Next year we are going to run two of the workshops consecutively, encouraging participants to attend both workshops. That way we will develop a deeper relationship with participants and relate the later workshop closer to their individual needs or contexts.

Reflections on the CASS short course programme: current practices and experiences

CASS, January 2008

About CASS

The CASS programme (Courses in Applied Social Surveys) is a long-term ESRC investment in training which aims to promote understanding and improved applications of social survey methods and to build national capacity in quantitative methods. This is achieved by providing face-to-face short courses at the basic/intermediate level across the whole quantitative survey process from design and data collection to data analysis. The programme is administered and delivered through the Southampton Statistical Sciences Research Institute (S3RI).

Course participants

Demand for course places remains buoyant with many courses being fully booked, sometimes well in advance of the course. CASS usually allows a maximum of 30 course participants (and ideally no more than around 25 participants per course). CASS operates a waiting list for courses and aims to repeat popular courses (e.g. a course on structural equation modeling and questionnaire design have proven very popular).

CASS also offers advice to potential course participants prior to any course, for example on prerequisites for a course and on what type and level of course might be most suitable for the person. This has been proven very helpful to course participants.

CASS also offers in principle advice to course participants after a course. However, it appears that after the event course participants seem very busy with their other tasks and may not have much time to revisit the course material.

Courses delivered outside Southampton

Since 2005 CASS has made great efforts to deliver courses outside Southampton. In particular CASS has made extensive use of regional training centres which have made it possible to run courses elsewhere. CASS has made primarily very positive experiences with the use of regional training centres. CASS has delivered courses in Newcastle (at the time not a regional training centre), Cardiff, Edinburgh, London, and soon in Belfast and possibly Bristol.

Difficulties encountered so far are:

- Facilities can often only be booked during holiday times and not during term time. However, to ensure a sufficient number of course participants CASS aims to run the majority of courses during term time.
- Sometimes it is difficult to book the facilities ahead of time (e.g. CASS aims to plan the new course programme between February and May every year but bookings with regional training centres may only be confirmed or possible during the summer period).
- Sometimes it is only possible to book a seminar room but not a computer lab, or the computer lab is only available for very specific times during the day, which is not much use.
- Although communication with regional training centres is generally good, there have been two occasions when problems have occurred: a.) the facilities were booked for a three day course well in advance when after about two months it turned out that on one of the days the room was booked for a departmental seminar which was not possible to change apparently. The CASS course had to be rescheduled with short notice. b.) it occurred that for one course on the first day there was not much administrative support, although regional training centres should offer such support during the course (e.g. welcoming course participants, ensuring facilities are working, lunch is delivered etc). Particularly important is that someone at the training centre checks that all course material has arrived per post and knows where it is stored until the beginning of the course.

Courses given by external / international presenters

Over the last couple of years CASS has expanded the number of courses given by international presenters. In particular, lecturers include researchers from the US Joint Program in Survey Methodology (JPSM) at the University of Michigan, with which CASS now has an agreement for at least one course per year, and from Australia, the Netherlands, NatCen, and other external UK experts. This set up is working very well. This has also widened the type of course topics that can be offered. For example, for the next academic year a course on Websurvey design is planned, to be delivered by a member of staff from JPSM.

Type of course

The programme is composed of core and non-core courses to cover methods for the whole quantitative survey process. The four core courses in the programme are Survey Data Analysis I and II, Essentials of Survey Design and Implementation, and Regression Methods for Survey Data. CASS is committed to run these courses every year. This although it worked for the three year period 2005-2008 may sometimes feel restrictive. For example the course on 'Essentials of Survey Design and Implementation' is not in such a high demand. However, courses on other topics (e.g. Questionnaire design) have shown a very high demand in these areas. The distinction in core and non-core courses may therefore not be necessary and would need to change over time as new course demands emerge.

The majority of courses are 2 or 3 day courses which seem attractive to course participants. In the following academic year CASS may explore options for one-day courses.

Course evaluation

The course evaluation forms are a useful indicator for the quality of the courses. They also provide information on format and course topics course participants would like to see offered. CASS aims to address any training needs identified in this way.

Practical emphasise of courses:

All CASS courses have a practical emphasis. All courses include practical sessions or computer workshops to enable participants to put the learned methods into practice. This has proven very popular and useful for students learning experience, as feedback from course participants has shown.

Some courses on the last day offer a longer practical session where course participants can analyse their own data and apply the methods learned from the course on their own datasets. This has proven very popular and beneficial to course participants.

CASS fellowships

Each CASS fellowship (worth £3000) allows a researcher to visit the University of Southampton for a period of approximately one month (or several shorter visits). During this time the researcher has the opportunity to work together with one or more senior members of staff from the School of Social Sciences. In the first year the emphasis of the fellowship was solely on the development of course training or online training material. This turned out to be somewhat unpopular with not many people applying to the scheme, despite wide spread advertising. In the following year the main aim of the fellowship was modified to emphasis a research component rather than a training component. The principal aim of the collaborative work was then to provide an opportunity for the development of a research project or to support and extend an existing project (e.g. by enabling a conference attendance). In addition, the successful applicant should contribute his/her knowledge, skills and experiences to assist in the delivery of one CASS course or to develop teaching material (which could include on-line resources).

In our experience, the fellowship scheme had some disadvantages even after the modification that were difficult to overcome. It was not easy to find suitable junior researchers/PhD students from outside Southampton that could work with a more senior member of staff in Southampton, in particular the matching of skills and interests between applicant and available members of staff appeared difficult. Also, more senior members of staff felt it was difficult to free up time and to commit to an additional supervisory role.

Although CASS made the three Cass fellowships work and the three fellows contributed well to the programme it was a distraction from the main aims and objectives of CASS.