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Trialling a new Survey Project Management Portal on the European Values Study 2017

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Rationale for a Survey Management Platform (SMaP)

Challenges

- High communication cost, loads of e-mails, attachments, spread sheets
- Difficult navigation between tools throughout the project lifecycle
- Lack of monitoring capacity and loss of information

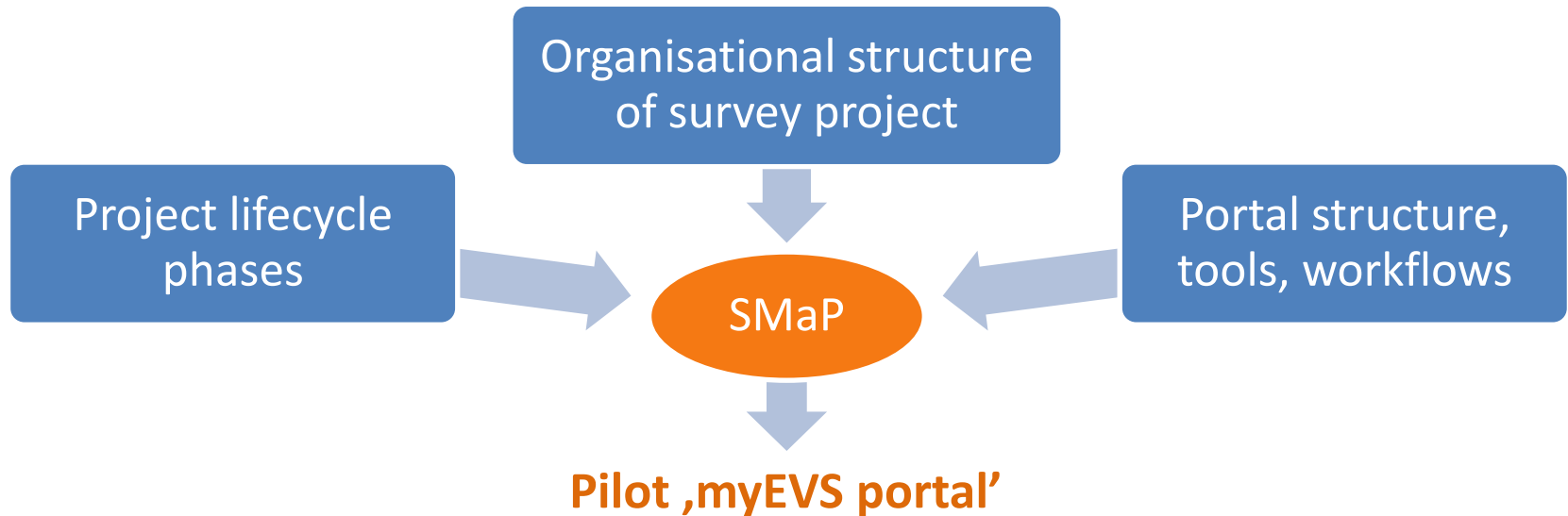
Our Solution

- A virtual environment for all actors involved and information transferred
- Combine project and data management applications
- Provide 'software as a supported service' to survey projects





Main building blocks



- Main goals
- Transparency for all portal members
 - Easy and secure access to information
 - Support of communication & collaboration





European Values Study (EVS)

The EVS is a large-scale and cross-national survey research program on basic human values. It is a unique research project on how Europeans think about life, family, work, religion, politics and society. It started in 1981 and is repeated every nine years.

<http://www.europeanvaluesstudy.eu>

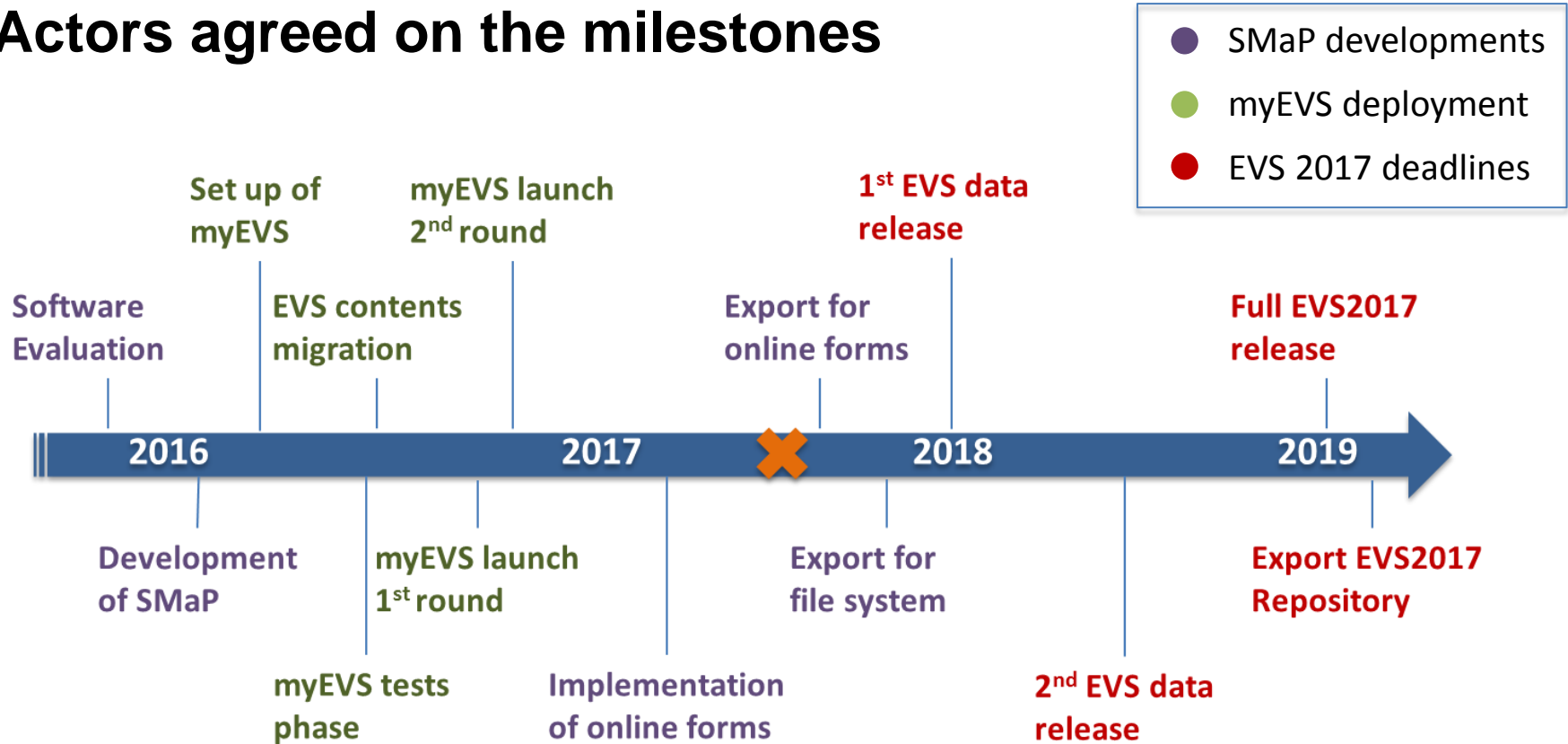
Profile of the pilot:

- **Survey project:** EVS wave 2017
- **Actors:** EVS planning groups, national EVS teams, external experts, data archive
- **Time period:** start of preparations in 2015, start of fieldwork in Sep 2017, full data release planned for the end of 2019
- **Project lifecycle phases:** planning phase, consultation process, fieldwork, data deposit and data processing
- **Key communication/cooperation:** between central teams and national teams



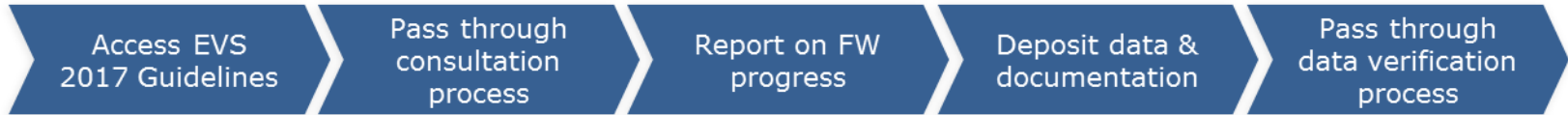


Actors agreed on the milestones



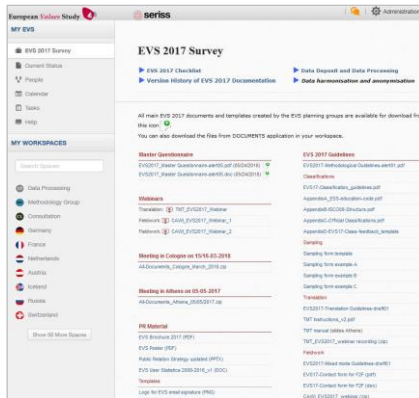


Defined tasks and workflows

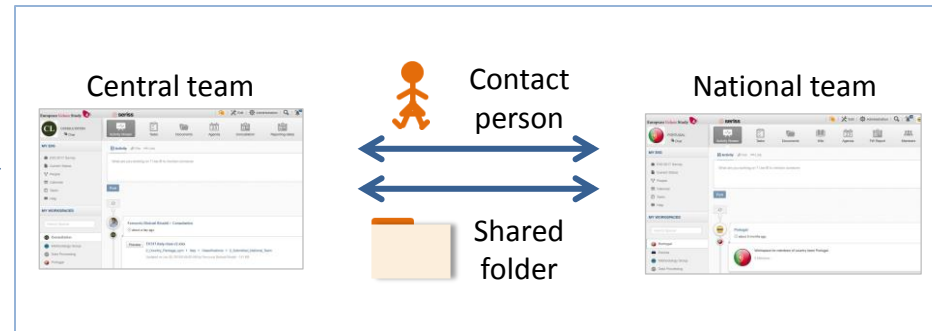


Main workflows on myEVS

Web pages
for common information



Workspaces
for team-specific information





myEVS: Landing page

- A**
 - Project lifecycle phases
 - Quick Helps
- B**
 - Guideline documents
 - Current status
 - My workspaces
- C**
 - Announcements
 - Portal members online
 - Quick Tips
 - Events





myEVS: Workspaces

Workspaces allow

- To quickly switch between tools
- Stay informed about team activities
- Manage contents that are private for the team
- Exchange information with other teams

Posts, tasks, upload/edit files trigger notifications.

A workspace is featured by tools

- **Activity Stream** is for communication between team members
- **Tasks** supports workflow management
- **Documents** provides access to files shared
- **Wiki** collects workflow information
- **Agenda** informs about central and team events
- **FW Report** form covers FW outcomes codes
- **Members** always gives an overview of workspace members

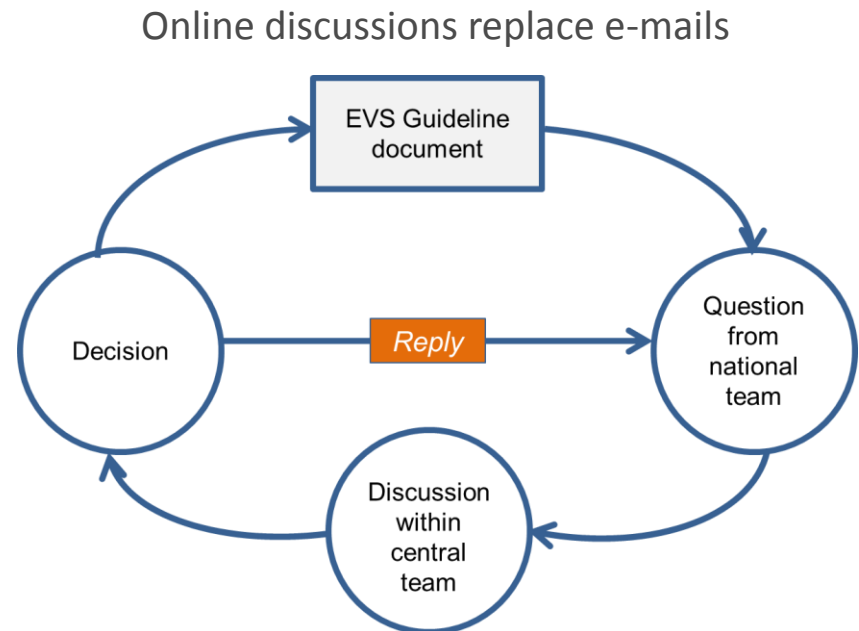




Example: Keep guideline documents updated

Contact persons support communication between national and central teams

- National team posts a question on Activity Stream
- Contact person transfers question to central team
- Experts comment on posted question
- Contact persons transfer decision back to national team
- Central team updates guideline documents if necessary



Claudia Brunori: myEVS Background activities of the central team.
EVS Workshop, Cologne, 15 March 2018.



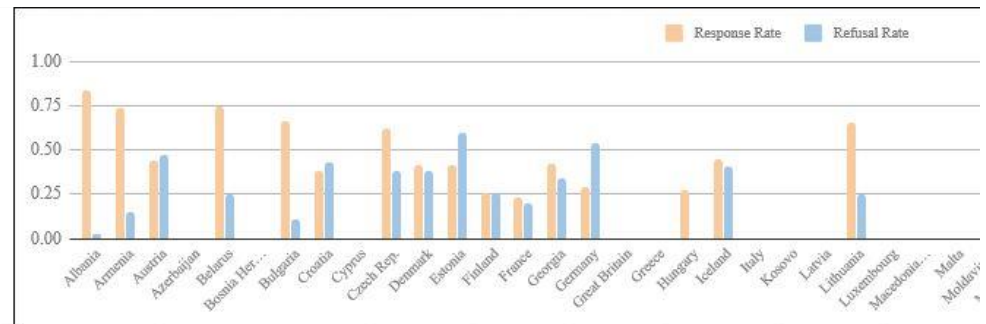


Example: Support fieldwork progress

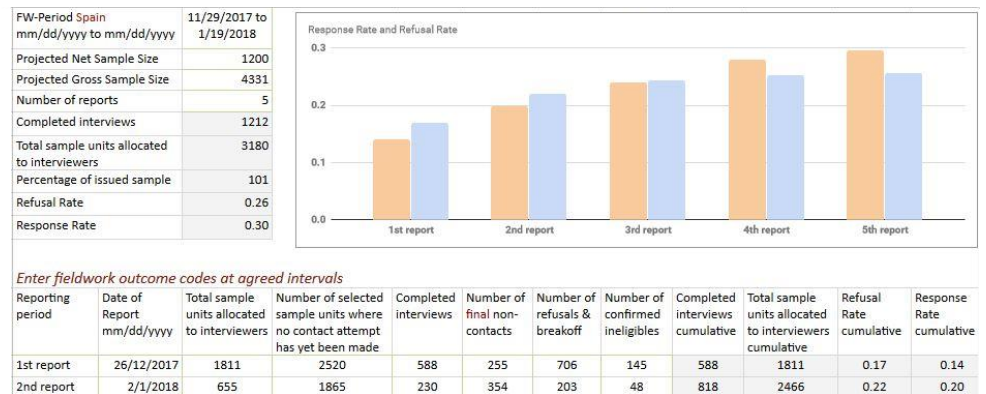
Linked online forms feature reporting & monitoring process

- Central team provides templates prior FW
- National team fills in information at agreed intervals
- Central team monitors compiled results across countries
- Central team publishes summarized results along with the data

Fieldwork monitoring by central team



Fieldwork reporting by national team





Example: Compile methodological information

Ease compilation, review and release of information

- Central team provides PDF document as part of guidelines
- National team fills in information after FW
- Central team approves information
- Central team published information as Method Report

Methodological Questionnaire online form

Methodological Questionnaire Spain

Home
V1 - Persons and institutions
V2 - Funding
V3 - Translation
V4 - The data collection
V5 - Interviewers training
V6 - Employment status of the interviewees
V7 - Visits to the respondents
V8 - Enhancing the interviews, incentives
V9 - Strategy for refusal conversion
V10 - Fieldwork reporting
V11 - Quality control back-checks
V12 - Verification of the questionnaire
V13 - Checking of data
V14 - Characteristics of the sample
V15 - General documentation: Region
V16 - General documentation: Education
V17 - General documentation: Occupation
V18 - General documentation: Political views
V19 - General documentation: Religion
V20 - General documentation: Income
V21 - Additional country-specific questions

v3.1 *

TMT has been used fully

TMT has not been used fully, the final translation has been uploaded to the platform

TMT has not been used (fully), the final translation has not been uploaded to the platform

ANSWER ONLY IF TMT HAS NOT BEEN USED AND THE FINAL TRANSLATION WAS NOT UPLOADED TO THE MYEVS PLATFORM

V3.2 Translation of questionnaire items changed since EVS 2008

Yes

No

V3.3 If yes, please list the question numbers:

V3.4 Who did the translation of the questionnaire? (tick all that apply) *

Professional translators

The Programme Director or his/her team

The fieldwork agency

Any other person (please specify)





Current state

139 portal members from 44 countries

- work in multiple teams and workspaces
- access and provide required information
- collaborate within and across teams
- discuss substantive and methodological problems
- complete project lifecycle phases

The current state of work in the phases of the EVS2017 lifecycle

European Values Study seriss

MY EVS

- EVS 2017 Survey
- Current Status
- People
- Calendar
- Tasks
- Help

MY WORKSPACES

Search Spaces

- Methodology Group
- Consultation
- Data Processing
- Germany
- France
- Netherlands
- Austria
- Iceland

EVS 2017 current state

Column A, B, D, E, H, and I, J (new): Information submitted by country teams and maintained by central team. Column C, F, G: Information entered in fieldwork reporting form by country teams.

	[A] Translation process complete	[B] Consultation process complete	[C] Planned fieldwork period CAPI/PAPI	[D] Mixed mode data collection	[E] Fieldwork started	[F] Percentage of issued sample CAPI/PAPI	[G] Percentage of issued sample CAVI/Mail	[H] Fieldwork complete
Albania	Yes	Yes			Yes	116		
Armenia	Yes	Yes	02.20.2018 to 04.30.2018		Yes	100		Yes
Austria	Yes		08/01/2018 to 14/05/2018		Yes	103		Yes
Azerbaijan		Yes			Yes	#DIV/0!		
Belarus	Yes	Yes	02/01/2018 to 03/12/2018		Yes	100		Yes
Bosnia Herzegovina						#DIV/0!		
Bulgaria	Yes	Yes	11/11/2017 to 09/01/2018		Yes	101		Yes
Croatia	Yes	Yes	10/25/2017 to 16/2/2018		Yes	81		Yes
Cyprus						#DIV/0!		
Czech Rep.	Yes	Yes	09/19/2017 to 12/01/2017		Yes	101		Yes
Denmark	Yes		09/27/2017 to 08/01/2017	Yes	Yes	101	133	Yes
Estonia			16.05.18-15.07.18		Yes	72		
Finland	Yes	Yes	12/27/2017 to 04/30/2018	Yes	Yes	92	100	
France			03/02/2018 to 07/15/2018		Yes	85	#DIV/0!	
Georgia		Yes	12/23/2017 - 3/7/2018		Yes	99		Yes
Germany	Yes	Yes	10/23/2017 to	Yes	Yes	99		Yes

Fieldwork - Data Processing - 1st Release

Hover the cursor over the map to show the country. Information comes from column E (FW: light red marked), column I (Data Processing: middle red marked), and J (1st Release: dark red marked) in table EVS 2017 current state.

Information from previous EVS waves

- Overview EVS 1981-2008
- EVS 2008 RR and outcome codes

Fieldwork monitoring tables

Accessible to members of EC, MG, and TG

Interviewer-Administered mode





First conclusion

- It is possible
 - To adapt portal software to the needs of survey projects
 - To manage projects with distributed actors in a virtual environment
 - To attract researchers to replace e-mails by online communication
- Big benefits are
 - Transparency for all portal members across the project lifecycle
 - Online collaboration of actors to generate real-time results
 - Standardized workflows and structured repositories at the end
- Challenges identified so far
 - The portal only lives and attracts its members if it is continuously maintained
 - For larger projects, maintenance requires a resourceful central team
 - Some tools need further development to fit workflow requirements





myEVS is supported by

Members of the central EVS team at Tilburg University:
Ruud Luijkx (team lead), Angelica Maineri, Claudia Brunori,
Laura Tanzini, Laura Barbonetti, Lucilla Losi

at GESIS:

Markus Quandt, Evelyn Brislinger, Ivet Solanes, Andrea Kuczora,
Nora Huth, Isabell Cohrs

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Developer: Masoud Davari (GESIS)

myEVS Manager: Evelyn Brislinger (GESIS)

Alexandra Stam, Brian Kleiner (FORS)

Team Leads: Markus Quandt and Claus-Peter Klas (GESIS)

