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

Organisational structure of survey project

Project lifecycle phases

Portal structure, tools, workflows

Pilot 'myEVS portal'

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

- Set up of myEVS
- myEVS launch 2nd round
- 1st EVS data release
- Full EVS2017 release
- Development of SMaP
- myEVS launch 1st round
- Export for online forms
- Export EVS2017 Repository
- myEVS tests phase
- Implementation of online forms
- 2nd EVS data release

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 654221.
Defined tasks and workflows

Access EVS 2017 Guidelines → Pass through consultation process → Report on FW progress → Deposit data & documentation → Pass through data verification process

Main workflows on myEVS

Web pages for common information → Workspaces for team-specific information

Central team → Contact person → National team

Shared folder

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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

Online discussions replace e-mails

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
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

[Diagram of methodological questionnaire form]

- V3.1: TMT has been used fully
- V3.2: Translation of questionnaire items changed since EV5 2008
- 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
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

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