



## 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**

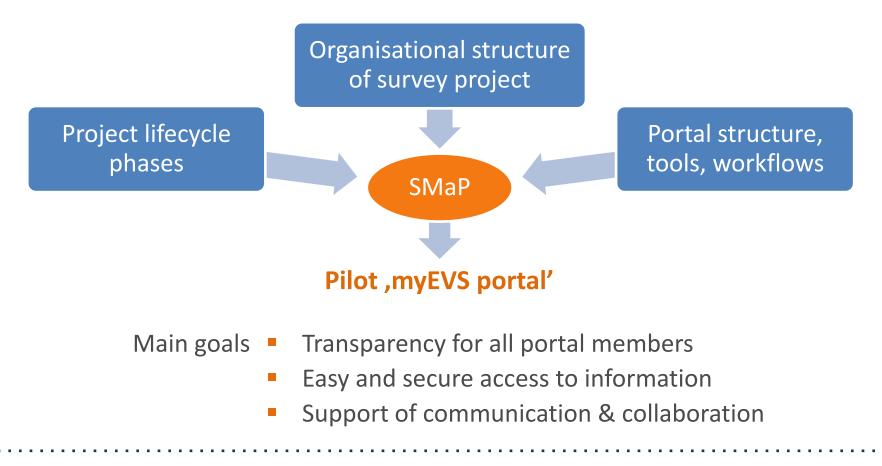
- A virtual environment for all actors involved and information transferred
- Combine project and data management applications
- Provide 'software as a supported service' to survey projects







## Main building blocks





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## 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.

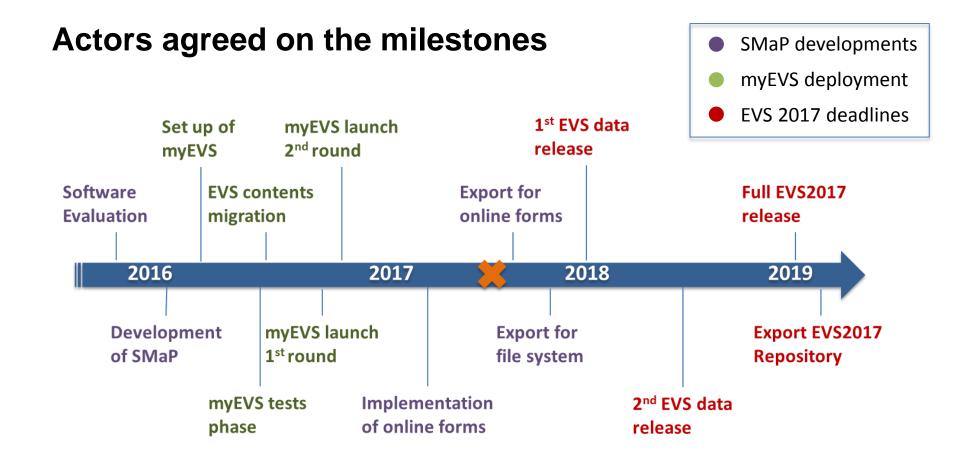
http://www.europeanvaluesstudy.eu

#### **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



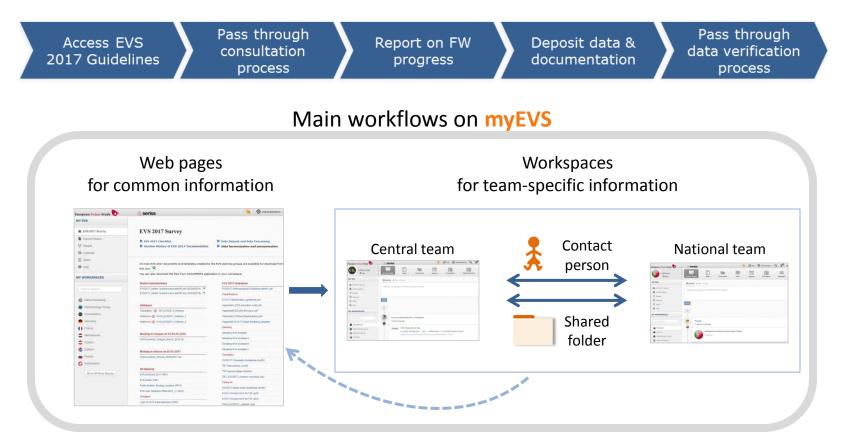








### **Defined tasks and workflows**







# myEVS: Landing page

#### A

- Project lifecycle phases
- Quick Helps

#### B

- Guideline documents
- Current status
- My workspaces

#### С

- Announcements
- Portal members online
- Quick Tips
- Events

uropean Values Study 🚺	Seriss	n   🔍   🌋   😁 myEVS Administrator		
IY EVS				
EVS 2017 Survey	Welcome to the myEVS portal	Announcements		
Current Status	myEVS is the first implementation of the Survey Project Management Platform - SMAP developed in the Horizon	We need your feedback to improve		
↓ People	2020 work programme. It is a project management platform providing a virtual collaborative workspace for survey teams and different stakeholders of survey projects. If you experience any technical troubles, discover errors or if	our EVS website! Please fill this (very short Survey. Many thanks for your cooperation!		
🔟 Calendar	you have any questions, please feel free to contact us. We appreciate your feedback and will continuously improve	current many mane for your cooperation		
🕄 Tasks	the portal.	Access to online forms		
💵 Help	Your main steps Click on the image to enlarge	Data Deposit and Methodological Questionnaire online forms are available here. Click to download the Quick Guide.		
Y WORKSPACES				
	EVS 2017			
Search Spaces	2	Who's Online?		
🖨 Russia		2202BBC		
Switzerland	Access EVS 2017 Pass through Guidelines Consultation process Progress Deposit data & Pass through data verification process	0		
Data Processing	See all documents on Provide Provide In your workspace Check and approve web page - Classifications + FW projections and Use online forms for draft data &			
🔁 Spain	EVS 2017 Survey     Field Questionnaire     (version History of     Sampling design     Version History of     Sampling design     Sampling design     Version History of     Version History     Version			
🛑 Bulgaria	documentation) In your workspace - Tasks: Data deposit Tasks: Three - Two processing - Tasks: Data deposit Tasks: Three - Two processing - Tasks: Documents: Folder	Quick Tips		
🛑 Armenia	Consultation tasks     Consultation tasks     Calendar: Enter FW     Data Deposit     Calendar: Release     Consultation tasks     Calendar:			
🌔 Malta	documents Calendar: Before FW dates	A very useful tool that allows you to		
loeland	Perform tasks during the survey lifecycle See all tasks on web page In your workspace In Central Calendar • EVS 2017 Survey -> EVS 2017 Survey Checklist • Current tasks on Board view • Main deadlines	quickly search for any desired content (documents, people, events, tasks etc.)		
Czech Republic	Leg 2017 Survey 7 Leg 2027 Survey Cireckinst     Current (BSKS Vir Dublid Heim     Proint desumes	from the top navigation bar.		
Sweden	Quick Helps			
Show 50 More Spaces	myEVS portal guides Introduction to myEVS 📲 Activity Stream 🔿 🁔	1 2 6		
	Document management 🚡 Chat 🔕 👔			
	Tasks 📷	4 Today: 6/25/18 ▶ 40		





## 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.

European Values Study	🍓 seriss					<b>Q</b>   🎾 Edurne	Bartolomé					
SPAIN Chat	Activity Stream Tasks	Documents	Wiki	23 Agenda	FW Report	A Members						
MY EVS												
EVS 2017 Survey     Current Status	A workspa	ice is fea	atured	l by to	ols							
ー ↓ People 団 Calendar ② Tasks	<ul> <li>Activity team m</li> </ul>	<b>Stream</b> is tembers	for com	imunicat	tion betv	veen						
	Tasks supports workflow management											
Search Spaces	<ul> <li>Documents provides access to files shared</li> </ul>											
<ul> <li>Spain</li> <li>EVS Community</li> </ul>	Wiki collects workflow information											
Council of PD     Executive Committee	• Agenda informs about central and team events											
Substantive Streams	<ul> <li>FW Rep</li> </ul>	ort form co	overs F\	N outco	mes code	es						
	<ul> <li>Members always gives an overview of workspace members</li> </ul>											

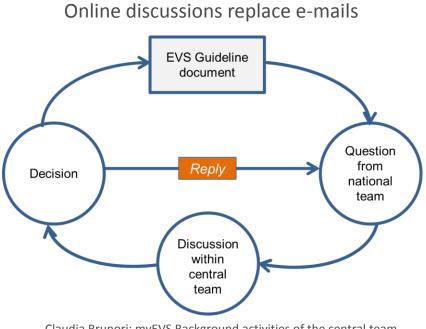




## **Example: Keep guideline documents updated**

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.



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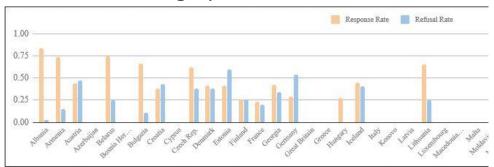


## **Example: Support fieldwork progress**

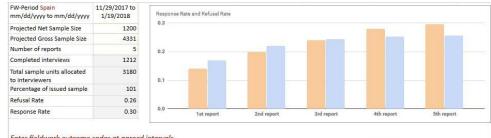
Linked online forms feature reporting & monitoring process

- 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



Reporting period	Report	units allocated	Number of selected sample units where no contact attempt has yet been made				confirmed	interviews		Refusal Rate cumulative	Response Rate cumulativ
1st report	26/12/2017	1811	2520	588	255	706	145	588	1811	0.17	0.14
2nd report	2/1/2018	655	1865	230	354	203	48	818	2466	0.22	0.20





## **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 Spain v3.1 \* V3 - Translation TMT has been used fully TMT has not been used fully, the final translation has been uploaded to the platform vment status of the in 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 V10 - Fieldwork reporting Yes V11 - Quality control back-checks 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)

Methodological Questionnaire online form





### **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

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YEVS	EVS 201									
EVS 2017 Survey					ion submitt	ed by cou	ntry teams	and mainta	ined by central	Fieldwork - Data Processing - 1st Release
Current Status	team. Col	umn C, F, G	: Informatio	n entered in I	Fieldwork r	eporting f	orm by cou	intry teams		20 J J Start
People		[A] Translation		[C] Planned fieldwork	[D] Mixed mode data		[F] Percentage of issued	[G] Percentage of issued	[H]	
2 Calendar		complete	process complete	period CAPI/PAPI	collection	started	sample CAPI/PAPI	sample CAWI/Mail	complete	S. Carlos
Tasks	Albania	Yes	Yes	Carifran		Yes	116	CANTINIAL		
Help	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	. Hall Inthe
Y WORKSPACES	Azerbaijan		Yes			Yes	#DIV/0!			
	Belarus	Yes	Yes	02/01/2018 to 03/12/2018		Yes	100		Yes	Hover the cursor over the map to show the country. Information comes from column E (FW: light red
Search Spaces	Bosnia Herzegovina						#DIV/0!			marked), column I (Data Processing: middle red
Methodology Group	Bulgaria	Yes	Yes	11/11/2017 to 09/01/2018		Yes	101		Yes	marked), and J (1st Release: dark red marked) in table EVS 2017 current state.
	Croatia	Yes	Yes	10/25/2017 to 16/2/2018		Yes	81		Yes	table EV3 2017 current state.
Consultation	Cyprus						#DIV/0!			
Data Processing	Czech Rep.	Yes	Yes	09/19/2017 to 12/01/2017		Yes	101		Yes	Information from previous EVS waves
Germany	Denmark	Yes		09/27/2017 to 08/01/2017	Yes	Yes	101	133	Yes	Overview EVS 1981-2008
France	Estonia			16.05.18-15.07 .18		Yes	72			EVS 2008 RR and outcome codes
Netherlands	Finland	Yes	Yes	12/27/2017 to 04/30/2018	Yes	Yes	92	100		Tial days de sus side sine de blas
Austria	France			03/02/2018 to 07/15/2018		Yes	85	#DIV/0!		Fieldwork monitoring tables
	Georgia		Yes	12/23/2017 - 3/7/2018		Yes	99		Yes	Accessible to members of EC, MG, and TG
loeland	Germany	Yes	Yes	10/23/2017 to	Yes	Yes	99		Yes	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



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## myEVS is supported by

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at GESIS:

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

Members of the SERISS project: SMaP Manager: Dafina Kurti (GESIS) Developer: Masoud Davari (GESIS) myEVS Manager: Evelyn Brislinger (GESIS) Alexandra Stam, Brian Kleiner (FORS) Team Leads: Markus Quandt and Claus-Peter Klas (GESIS)

