READY, SET, CODE: 5 STEPS FOR OPTIMIZING QUALITATIVE SOFTWARE FOR USE IN EVALUATIONS

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AEA   October 16, 2014

About SPR

- Social Policy Research Associates (SPR) is a certified small business founded in 1991 and based in Oakland, California

- SPR works nationally with clients in federal, county and local government, Foundations, non-profits and the private sector

- Our team of over 40 professionals, has in-depth expertise in a wide range of methodologies, intervention strategies and fields

Presentation Overview

□ Who we are

□ What we're <u>not</u> going to do:

  ▪ Recommend a particular package

  ▪ Discuss why QDAS is important (see our 2012 slides!)

  ▪ Review nuts and bolts of QDAS use

□ Instead, we will:

  ▪ Review our checklist for building evaluator capacity to use QDAS

  ▪ Share examples from our process introducing and growing support for QDAS in evaluation firms

Step 1: Establish your QDAS Infrastructure

Identify a QDAS champion

Obtain Buy-In From Company or Departmental Leaders

Step 1: Explore, Pilot and Select Software

Explore Options	Pick a Pilot Project	Select Your Package
• Types of data to be used • Server vs. static • Number of users • IT capacity	• Adequate Budget to Experiment • Tech-Savvy Team	• Trade-off of cost v. features

Step 2: Build and Support QDAS Use

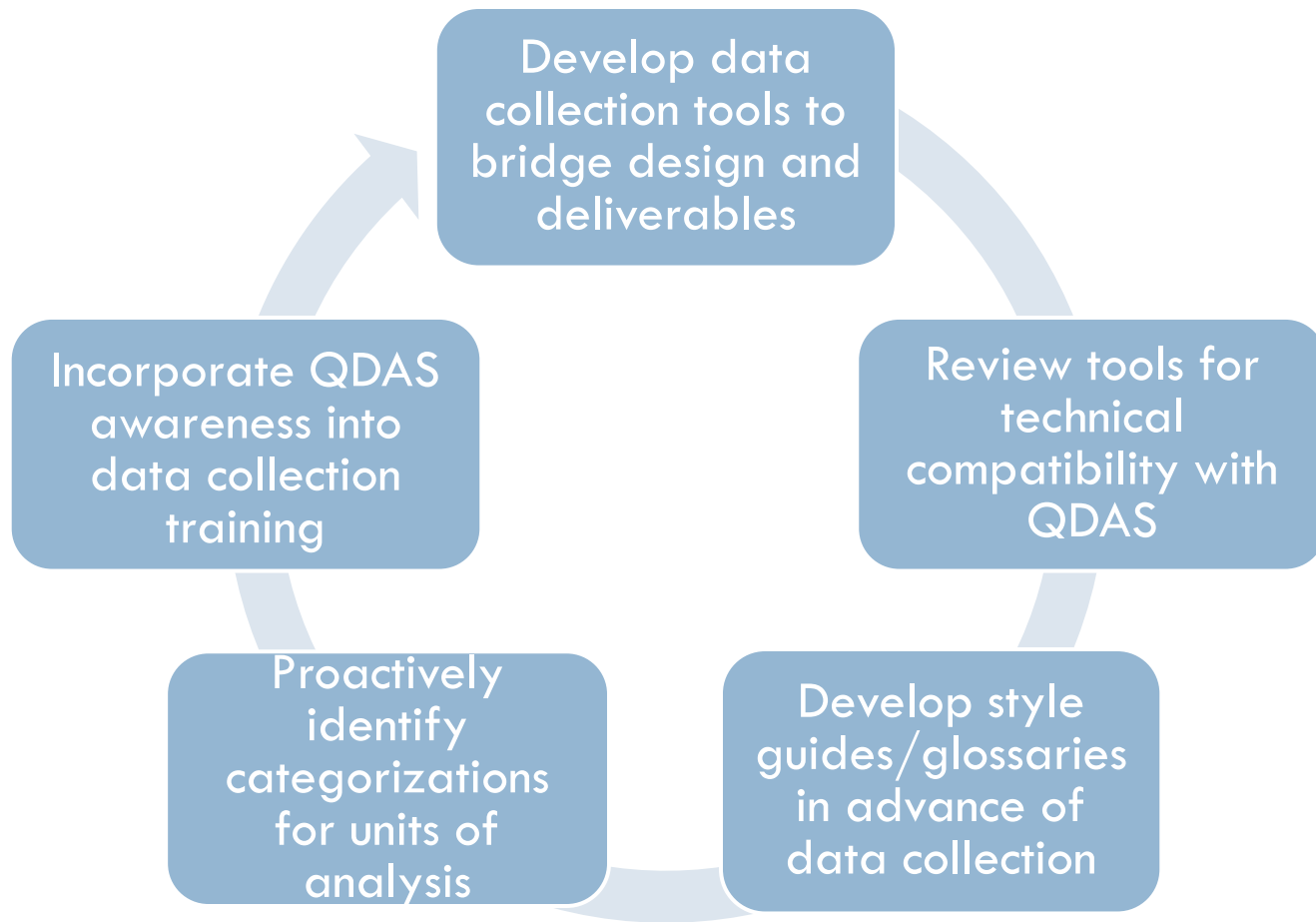| Build	
Purchase and installation plan	Initial and ongoing training plan

Step 2: Build and Support QDAS Use

Support	
Ongoing financial and administrative support	Ongoing software review and maintenance

Step 3: Align Data Collection Practices with QDAS

Develop data collection tools to bridge design and deliverables

Review tools for technical compatibility with QDAS

Develop style guides/glossaries in advance of data collection

Proactively identify categorizations for units of analysis

Incorporate QDAS awareness into data collection training

Step 3: Bridge Design & Deliverables

"GoldenGate01". Licensed under Creative Commons Attribution-Share Alike 3.0 via Wikimedia Commons - http://commons.wikimedia.org/wiki/File:GoldenGate01.JPG#mediaviewer/File:GoldenGate01.JPG

Step 3: QDAS Compatibility

- Format tools to work with QDAS before distributing to the team.
  - Consider headers/autocoding
  - Often bullets and auto-numbering don't work well
  - Review tables, graphs and images
- Practice importing
- Consider locking tools

Step 3: Style Guides

Step 3: Proactively Categorize

Program Description Form

Site Visitor: _____

Dates of Visit: _____

Name of Site: _____

Overview of the Lead Organization:

Organization Name: _____

Type of Organization: _____

Tenure of Organization ED: _____

Tenure of Program Coordinator: _____

Ave Tenure for other Prog staff: _____

Current Annual Budget Amount: _____

Time of Annual Budget Cycle: _____

Does the org. operate programs other than SCA? □ Yes □ No

List any other programs: _____

# of full time staff: _____

# of part time staff: _____

Total FTE of Prog staff: _____

Prior Annual Budget Amount: _____

Funding sources for match: _____

Intake/Recruitment/Enrollment:

Are eligibility criteria different than Federally specified? □ Yes □ No If yes, how? _____

What is the risk assessment tool? _____ Who administers it? _____

Does program prioritize enrollment for certain groups? □ Yes □ No If yes, describe: _____

Does program create eligibility lists itself? □ Yes □ No

Does program enroll pre-release? □ Yes □ No

Does program enroll post-release? □ Yes □ No

Below/right, indicate total # of individuals at the time of visit and since the evaluation launched at the site:

screened for eligibility: _____

applied to program: _____

determined eligible: _____

Does the program do pre-release RA? □ Yes □ No

Does program provide RA results in person? □ Yes □ No

Does program provide control group a referral list? □ Yes □ No

Does program provide control group a referral list? _____ / _____

#s assigned to program/control: _____

in program group that began the program: _____

participants currently in program: _____

in the study that have completed the program: _____

Step 3: Training the Research Team

MEMO

To:	Field Research Team
From:	QDA Task Leader
Date:	September 6, 2013
RE:	Field Visit Write-up Guidelines

Why we're using a formatted write-up template:
NVivo is able to autocode in a Word document by identifying all text formatted using a "Heading" style. NVivo then codes all regularly formatted text (i.e., text that is not in a header style) to a "node" with the name of that heading until it reaches another heading. The auto-coded nodes that NVivo will create for will be each of the headings in the project write-up template. We can then further create new nodes (e.g. communication strategies, etc.) as needed or appropriate during the analysis phase.

What you need to do to create your write-up:
Please use the provided interview write-up template for the project. The templates are specially formatted for reading into NVivo. You should not alter the names, spacing or formats of headings in the template. If you alter the headings, your document will not be autocoded correctly.

What if I have suggestions for additional topic headers that seem to make sense?
While doing your write ups, ideas for new codes will probably come to mind. Please communicate any ideas and suggestions for new codes during our team meetings and we will decide how these might fit into the coding structure. You might also include these in your reflections memo. *Do not add new headers into your documents!*

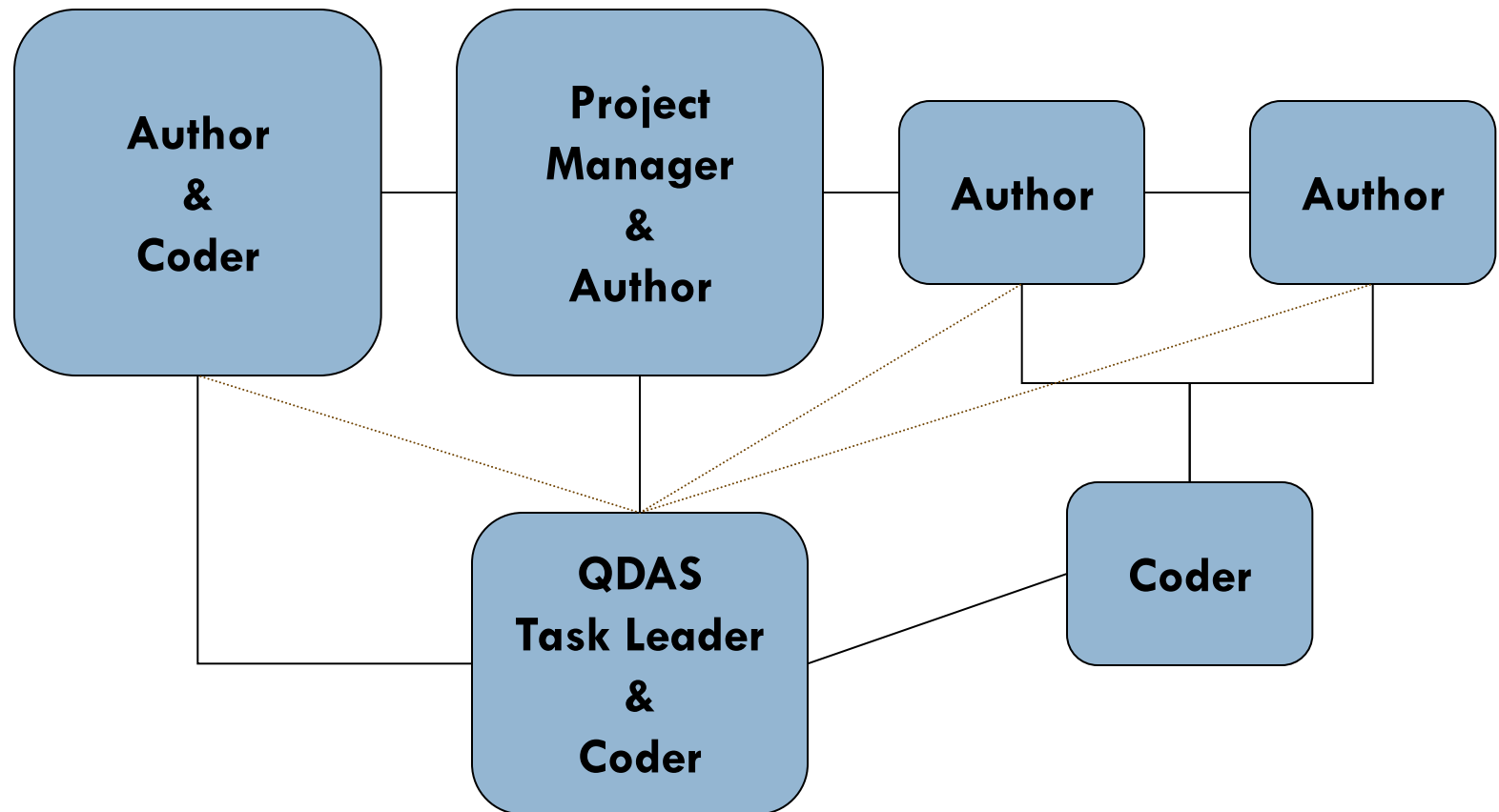# Step 4: Develop a QDAS Management and Guidance System

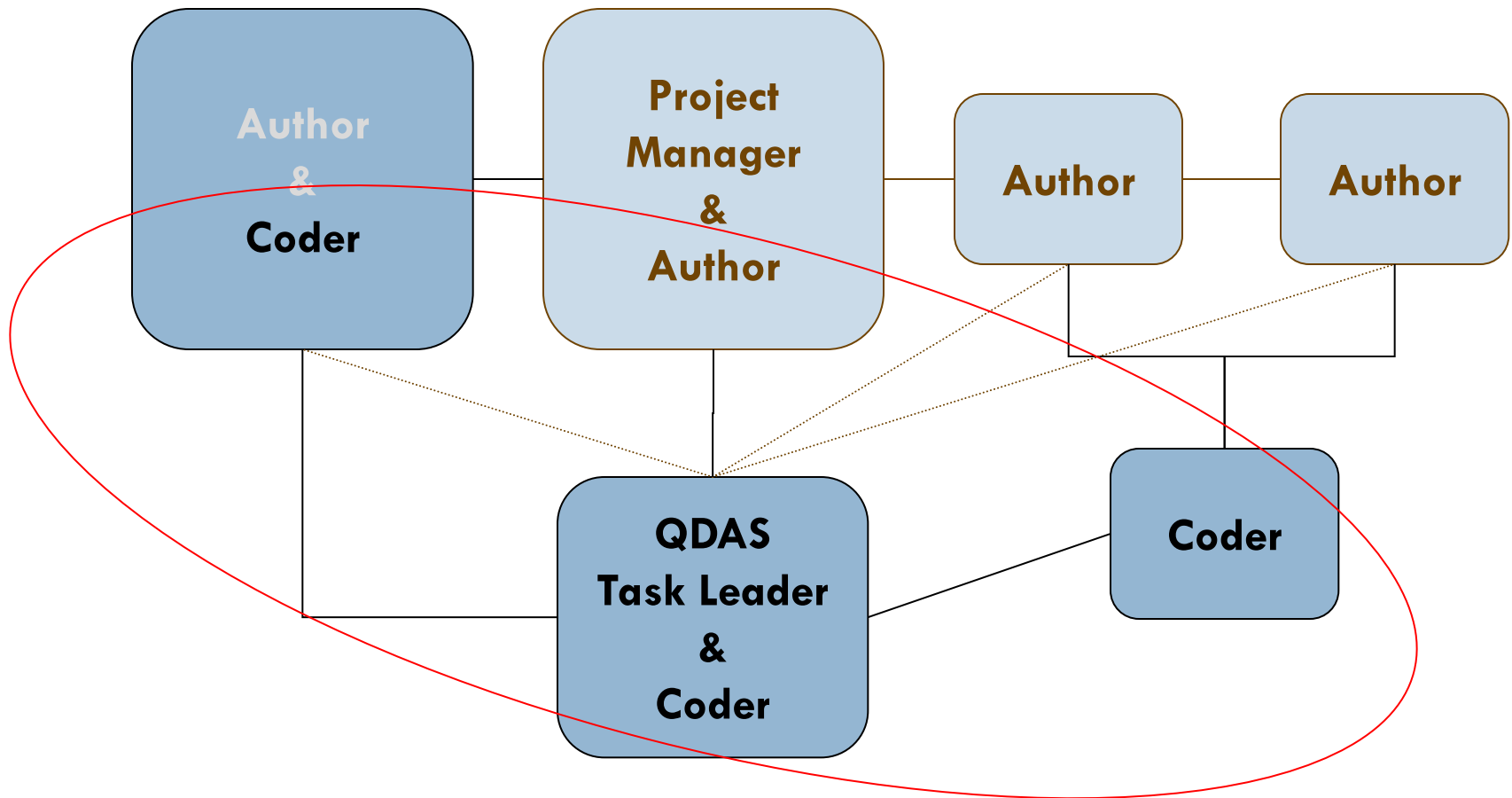Establish project team roles keeping QDAS in mind

Develop a work plan to allow for QDAS work

Allocate project resources to support QDAS
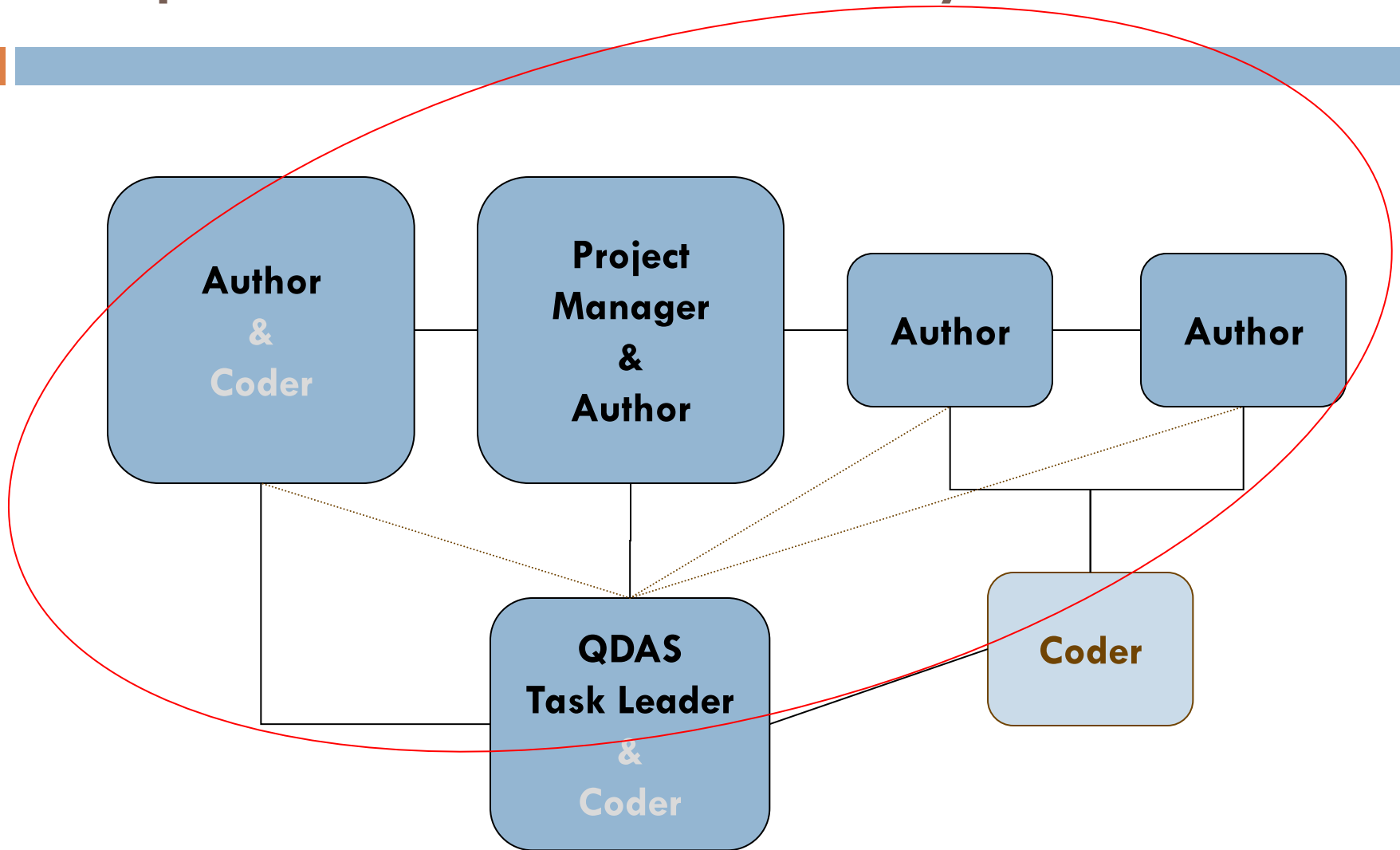
Step 4: Team Roles – Project Team
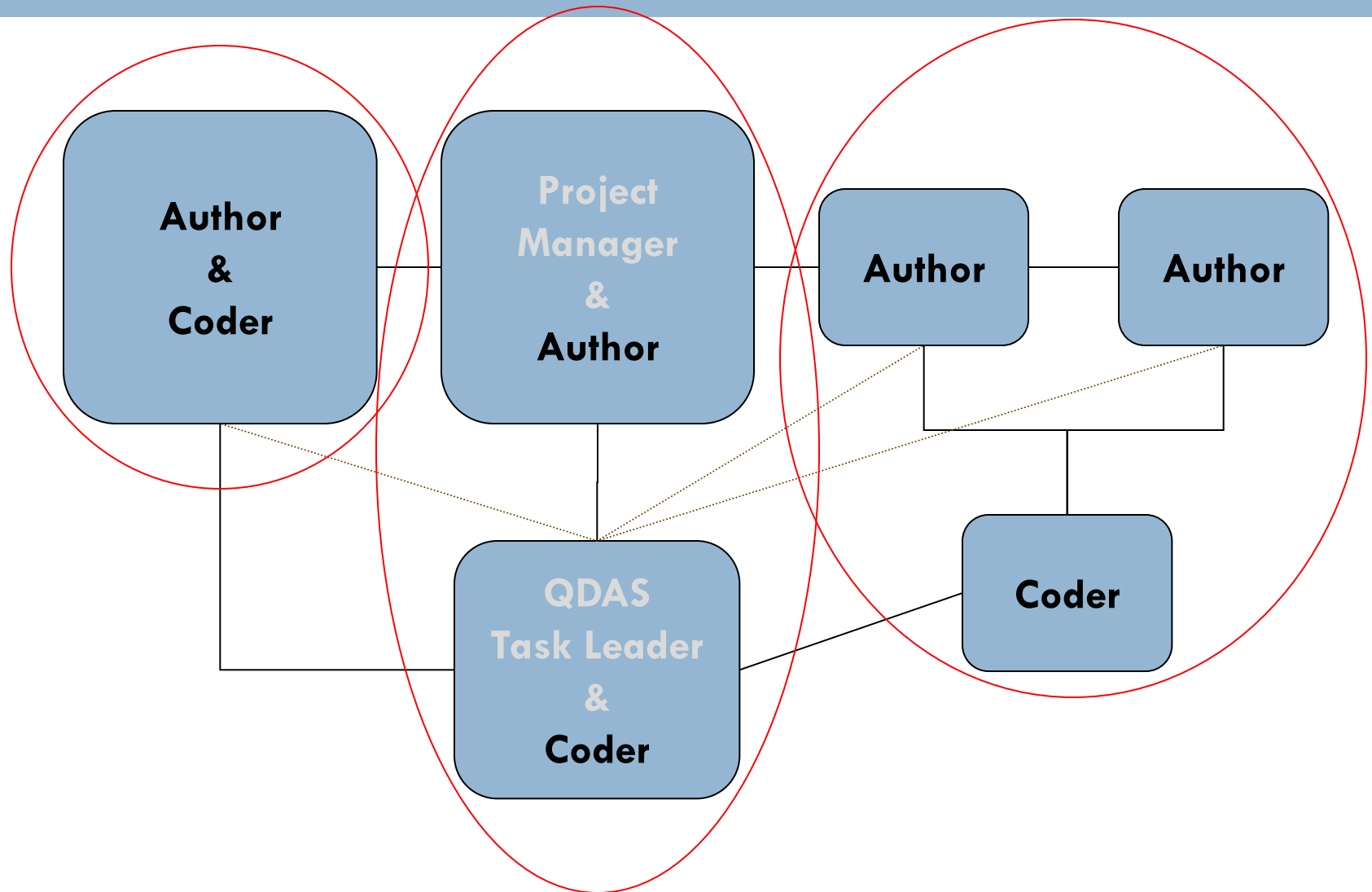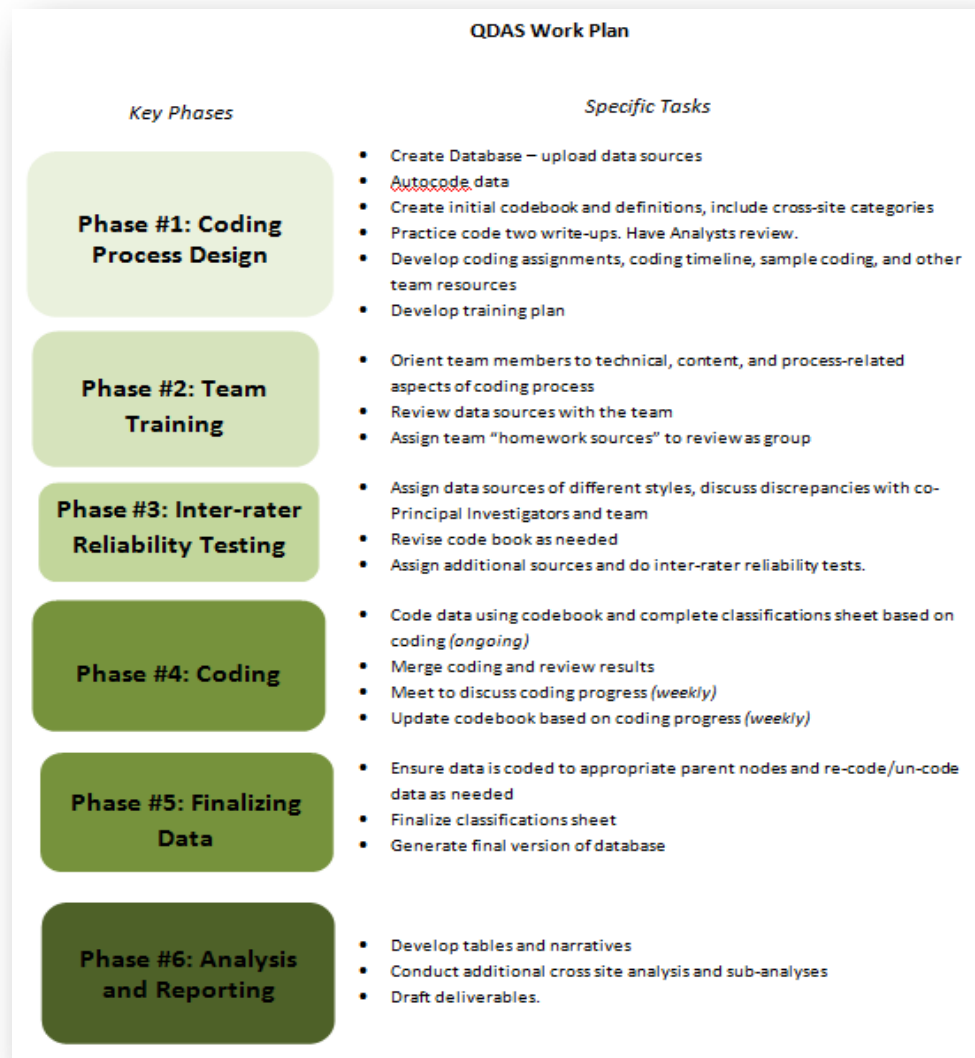
Step 4: Team Roles - Coding Team

Step 4: Team Roles Analysis Team
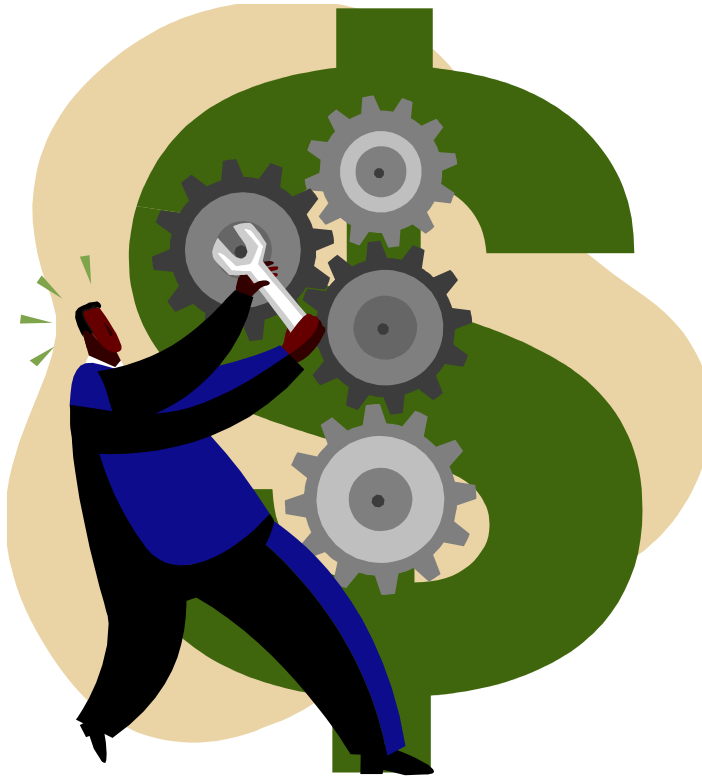
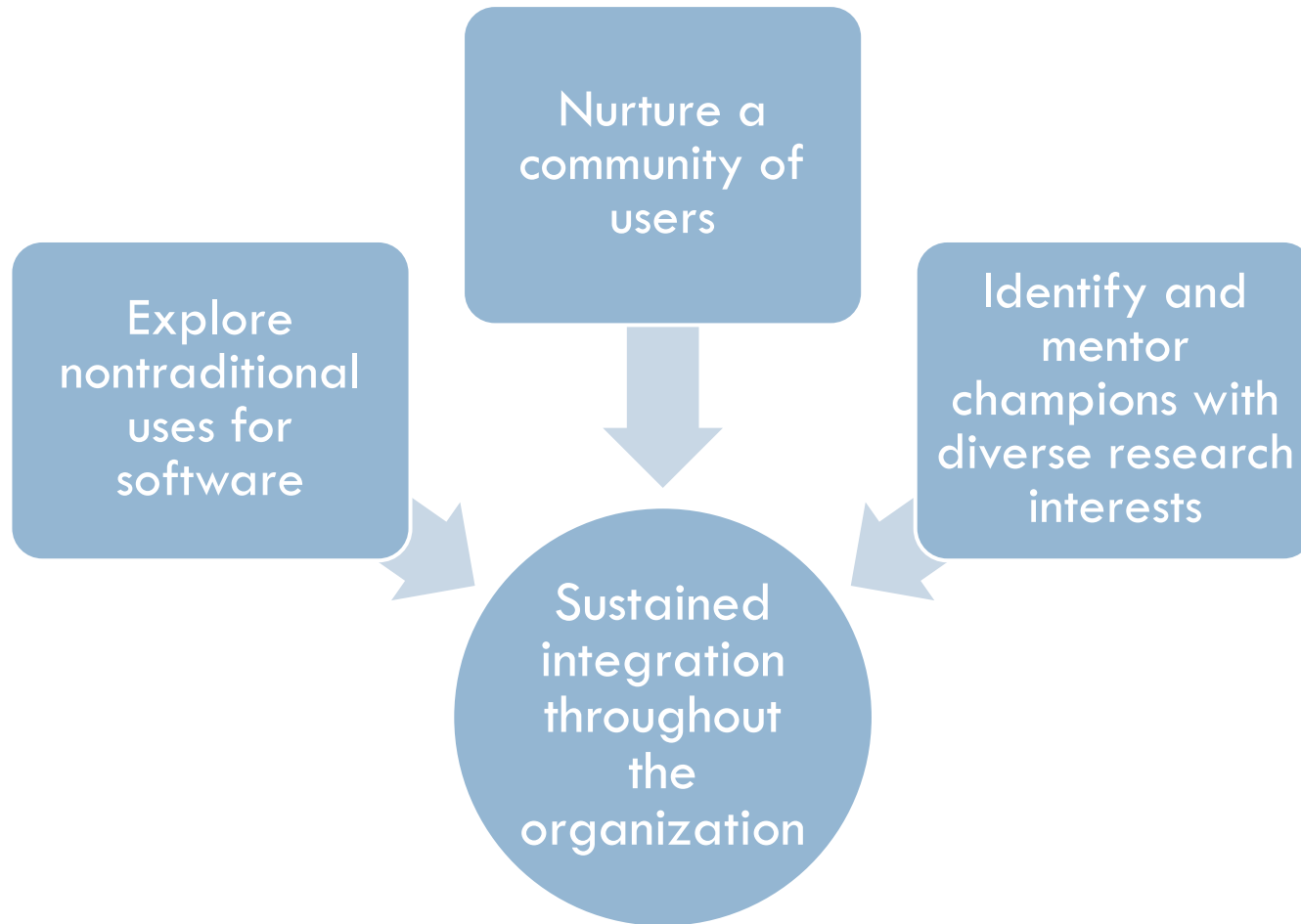# Step 4: Team Roles - Chapter Teams

Step 4: Develop a Workplan

QDAS Work Plan

Key Phases

Phase #1: Coding Process Design

Phase #2: Team Training

Phase #3: Inter-rater Reliability Testing

Phase #4: Coding

Phase #5: Finalizing Data

Phase #6: Analysis and Reporting

Specific Tasks

- Create Database – upload data sources
- Autocode data
- Create initial codebook and definitions, include cross-site categories
- Practice code two write-ups. Have Analysts review.
- Develop coding assignments, coding timeline, sample coding, and other team resources
- Develop training plan

- Orient team members to technical, content, and process-related aspects of coding process
- Review data sources with the team
- Assign team "homework sources" to review as group

- Assign data sources of different styles, discuss discrepancies with co-Principal Investigators and team
- Revise code book as needed
- Assign additional sources and do inter-rater reliability tests.

- Code data using codebook and complete classifications sheet based on coding *(ongoing)*
- Merge coding and review results
- Meet to discuss coding progress *(weekly)*
- Update codebook based on coding progress *(weekly)*

- Ensure data is coded to appropriate parent nodes and re-code/un-code data as needed
- Finalize classifications sheet
- Generate final version of database

- Develop tables and narratives
- Conduct additional cross site analysis and sub-analyses
- Draft deliverables.

Step 4: Allocate Resources

Step 5: Integrate QDAS Into Organizational Culture

Step 5: Explore Other QDAS Uses

Converting field guides into protocols

Performance reviews

Combining site visit notes into write-ups

Literature reviews

Step 5: Nurture a Community of Users

Step 5: Mentor Champions

Questions?

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