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The myEVS Project Management Portal: A Case Study for Survey Projects

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

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

Possible solution

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

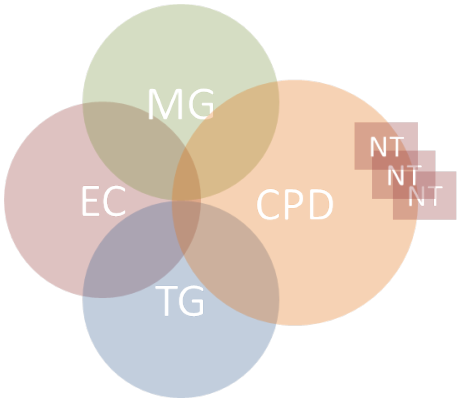
myEVS is a result of the collaboration between

European Values Study and GESIS-Data Archive

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The building blocks of SMaP

Organisational structure of survey projects

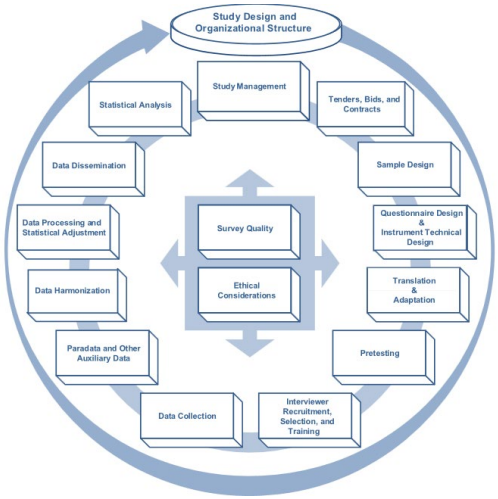


Example: EVS 2017

- CPD - Council of program directors
- EC – Executive Group
- TG - Theory Group
- MG - Methodology Group
- NT - National team

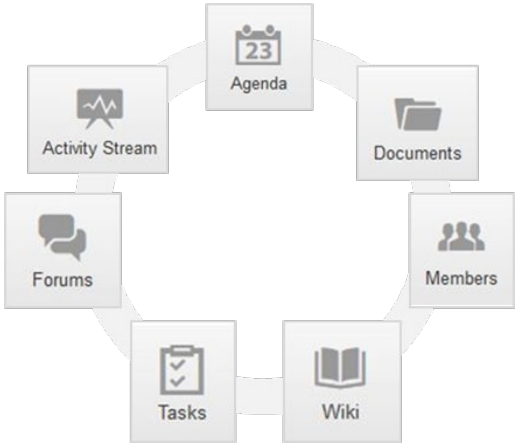
https://www.exoplatform.com/

Project lifecycle phases, tasks, responsibilities



Survey Research Center. (2016). Guidelines for Best Practice in Cross-Cultural Surveys. Ann Arbor, MI: Survey Research Center, Institute for Social Research, University of Michigan. Retrieved March, 13, 2019, from http://www.ccsg.isr.umich.edu/.

Portal with workspaces, applications, workflows



The portal is based on the open source version of the eXo Platform - Community Edition. https://www.exoplatform.com/

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European Values Study (EVS)

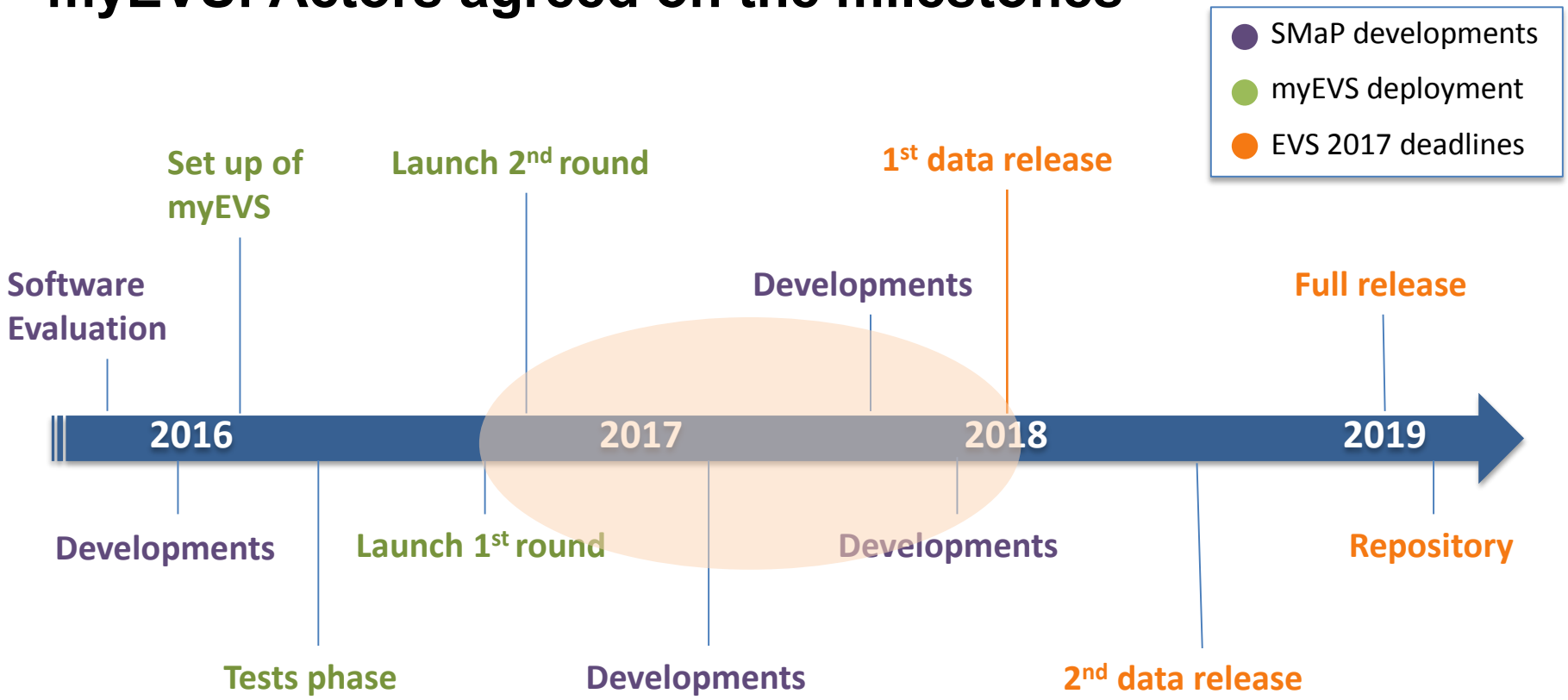
The EVS is a large-scale and cross-national survey research program on basic human values. It is a unique research project on how Europeans think about life, family, work, religion, politics and society. It started in 1981 and is repeated every nine years (http://www.europeanvaluesstudy.eu).

Profile of the pilot

- *Survey project*: EVS wave 2017
- *Actors*: EVS planning groups, national EVS teams, external experts, DAS archive
- *Time period*: start of preparations in 2015, start of fieldwork in Sep 2017, full data release in 2019
- *Project lifecycle phases*: planning phase, consultation process, fieldwork, data deposit/processing
- *Key communication/cooperation*: between central teams and national teams
- *Key challenge*: 9 year intervals between the waves

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myEVS: Actors agreed on the milestones



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myEVS: The landing page

A

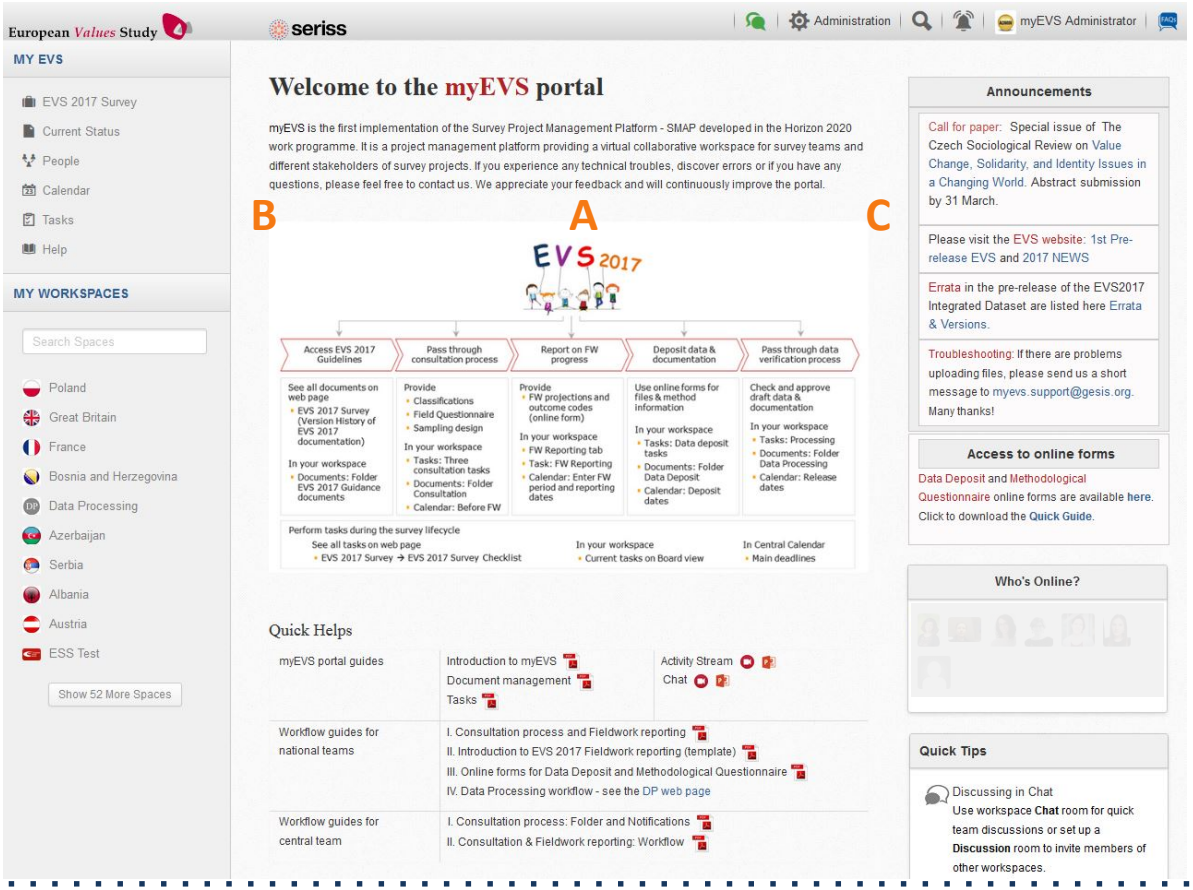
- Project lifecycle phases
- Quick Helps

B

- Guideline documents
- Current status
- My workspaces

C

- Announcements
- Portal members online
- Quick Tips
- Events



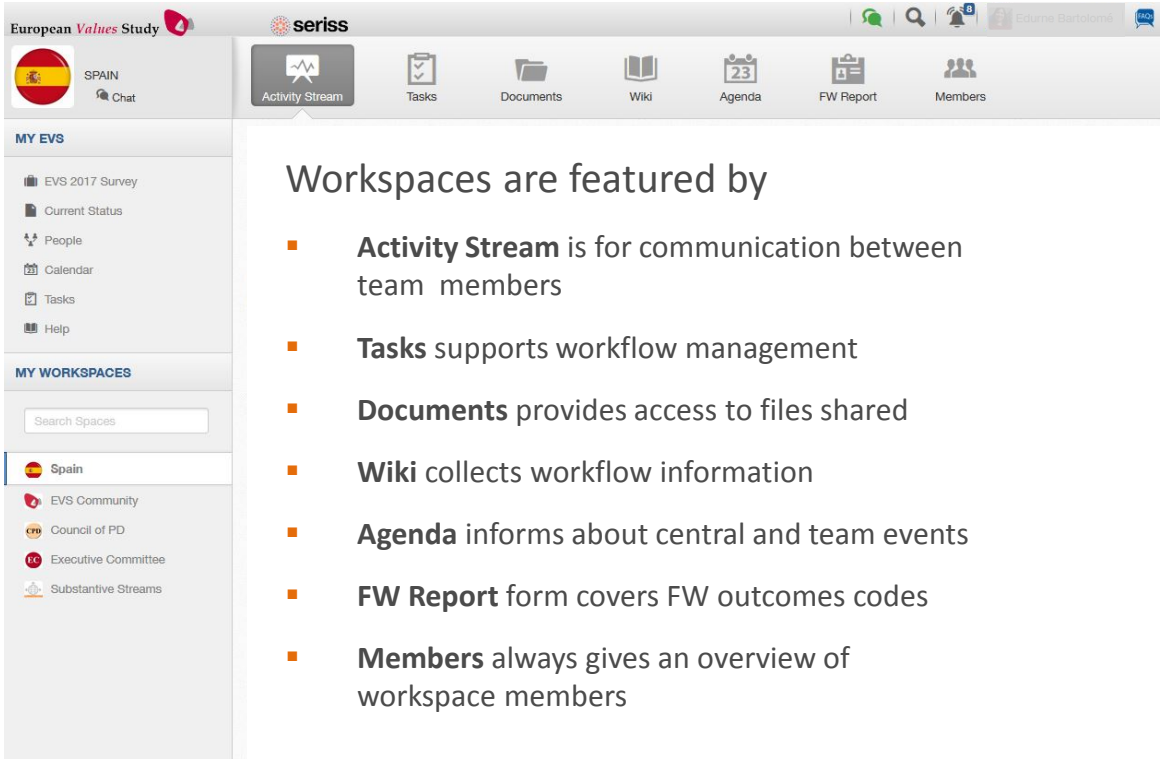
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myEVS: A typical workspace

Workspaces allow

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

Posts, tasks, upload/edit files trigger notifications.



Workspaces are featured by

- **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

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Three user stories

National Team

Central Team

Data Archive

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User story: Members of a national team (1)

National teams are in charge of the data collection, going through the project phases and creating data and documents that meet the required standards.
Their work load is high. The less routine they have in working with project-specific workflows and protocols, the higher the burden.

Our solutions

… sign-posted paths to documents and tools and standardized step-by-step processes to support team members and allow them to concentrate on their actual tasks.

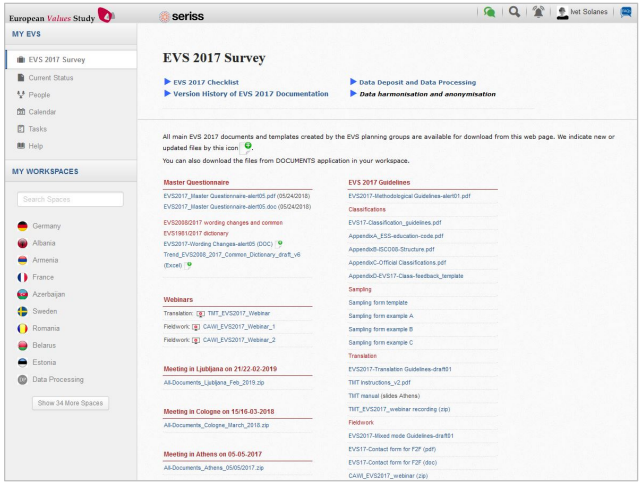
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User story: Members of national teams (2)

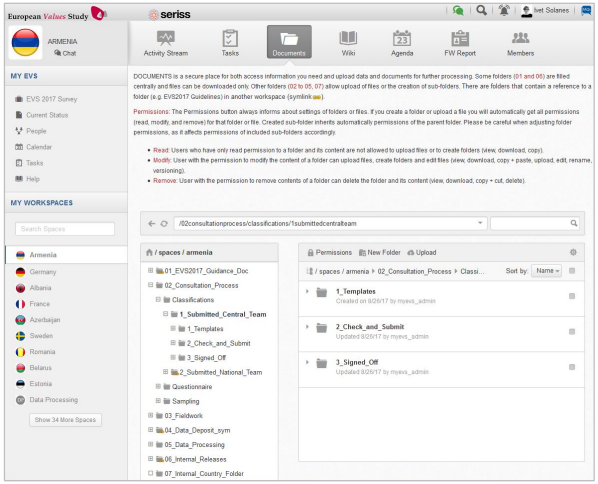
Access EVS 2017 Guidelines → Pass through consultation process → Report on FW progress → Deposit data & documentation → Pass through data verification process

Guidelines, national delivery, and communication easily accessible in one place

Web page for guideline documents



Workspace for country-specific information



National team members

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User story: Members of the central team (1)

The central team supports the national teams with guidelines and advice to enable compliance with agreed standards and workflows.
Countries are at different project stages: while some have already completed data processing, others are still in the consultation phase or even in the questionnaire translation.

Our solutions

… cross-team collaboration moderated by contact persons and linked standardized folders to transport experiences and files, keep guidelines updated, and make the common knowledge accessible to all.

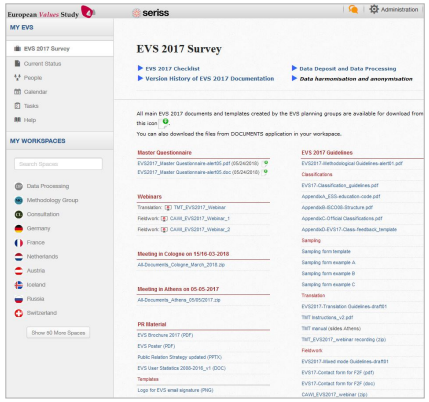
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User story: Members of the central team (2)

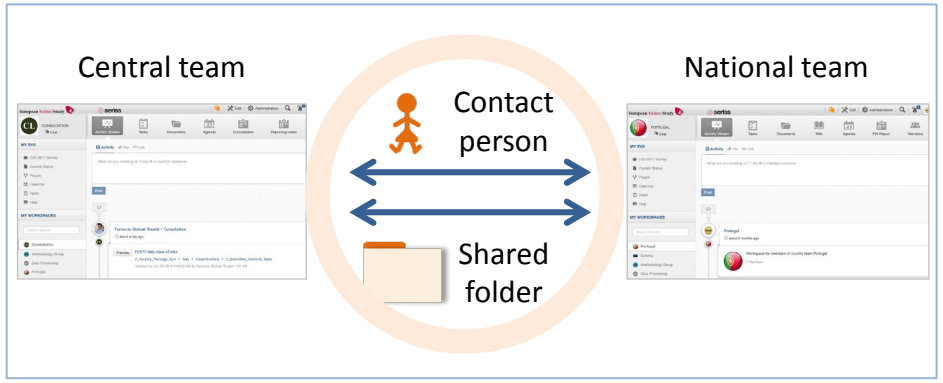
Access EVS 2017 Guidelines → Pass through consultation process → Report on FW progress → Deposit data & documentation → Pass through data verification process

Contact persons keep things running and updated by connecting teams and expertise

Web pages for Guidelines



Workspaces for team-specific information



- Central team members
- Cross-team collaboration

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User story: Data archive (1)

Data archives are in charge of the publication of well processed and documented data. They often have to deal with an enormous number of files and file versions or even with information loss when projects use e-mail as a communication channel and e-mail attachments as the main medium for exchanging documents.

Our solutions

… ensure transparent and customized communication flows by a centralized document management allowing both keeping files in their context of origin and tracking changes; export a final EVS 2017 Repository hosted at GESIS as a trusted academic institution.

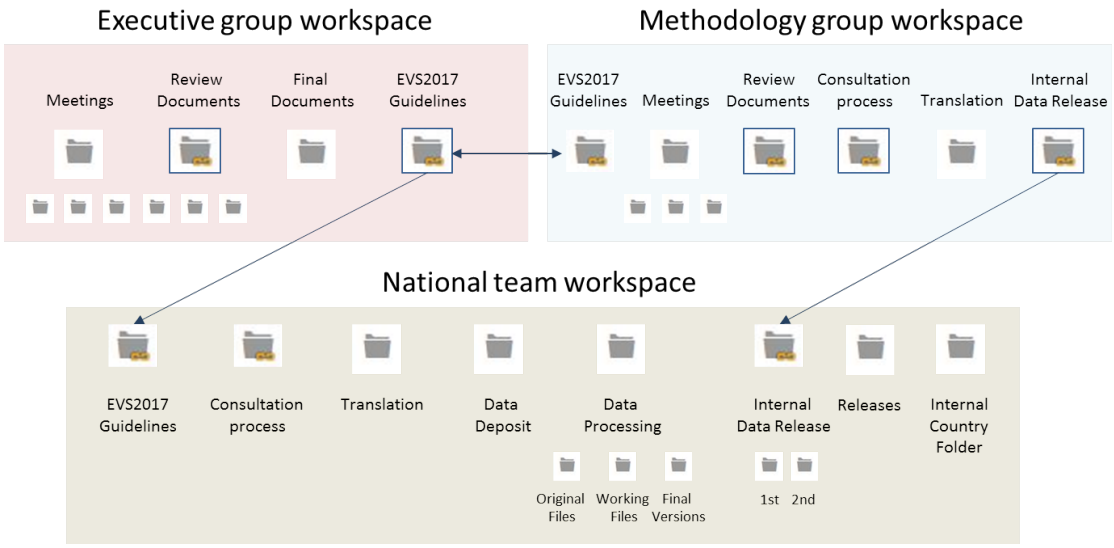
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User story: Data archive (2)

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

Access data and documents and track changes across phases, workflows, and actors

Folder structure adjusted to the tasks of EVS member groups



EVS 2017 Repository

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First result: 1st Pre-release EVS 2017

Data

EVS 2017 Integrated Dataset, ZA7500, v.1.0.0 (2018-12-18), doi:10.4232/1.13090

Documentation

Guideline documents

- Methodological Guidelines
  - App A1: Classifications
  - App A2: Sampling Template
  - App A3: Translation Guidelines
  - App A4: Mixed-Mode Strategy
  - App A5: Fieldwork/Reporting
  - App A6: Data Processing
- Master Questionnaire EVS2017

Data documentation

- Method Report
- Variable and harmonization reports
  - App A1: Religion
  - App A2: Political Parties
  - App A3: Education
  - App A4: Mapping Education
  - App B: Income
  - App C: NUTS

The main workflows were/are supported on myEVS

Next steps

Preparation of the 2nd Pre-release EVS 2017

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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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