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| **Step in Data Management** | **Data Management Tasks** | **Person Responsible** |
| Data Management Plan  Worksheet 10.1 Data Management Plan Template | • Develop data dictionary (or code book).  • Develop a data management plan defining roles and responsibilities for personnel and procedures for all steps below.  • Develop standardized approaches for naming variables, files and versions of files, programs, data sets and other documents, and for coding data.  • Collect all relevant documentation including the original proposal, instruments, code book, and other documents that are created. |  |
| Data collection in the field | • Develop and follow protocols for data collection.  • Train and “certify” data collectors.  • Coordinate data collection with organizational and intervention schedules to minimize disruption.  • Ensure Institutional Review Board processes for informed consent are followed.  • Conduct data quality and completeness check as data are collected/returned.  • Track data collection process (e.g., surveys sent, followed up, and returned) in database such as Access. |  |
| Data transfer | • Define and follow procedures for getting data from field to data entry process.  • Develop and follow data security procedures. |  |
| Data entry | • Ensure data dictionary, or code book, is finalized.  • Pilot test data entry format and procedures.  • Train data entry staff on standardized approach.  • Enter data into selected software with end uses in mind (e.g., variable formation, data merging, data analysis, and reporting requirements). |  |
| Data cleaning | • Use built-in features of software to check data for out-of-range values and other anomalies.  • Run preliminary descriptive analysis (e.g., frequencies and means) to check for anomalous results. |  |
| Data processing | • Based on project requirements, recode raw variables, create new variables and make other variable transformations as needed.  • Merge data sets as needed.  • Create permanent implementation monitoring data set. |  |
| Data storage | • Ensure data are stored securely.  • Organize files systematically. |  |
| Data access | • Develop procedures for access to data.  • Monitor access to data. |  |
| Data analysis/synthesis and reporting (see Chapters 8, 11 and 12) | • Keep copies of programs and output (and/or other documentation related to analysis procedures).  • Create tables for results.  • Develop reporting format appropriate for the audience. |  |