|  |  |  |
| --- | --- | --- |
| **Step in Data Management** | **Data Management Tasks** | **Person Responsible** |
| Data Management PlanWorksheet 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. |  |