IDA+A
Institutional Data Analytics + Assessment

Planning Timeline (Qualtrics Example)

Inquiry projects require a reasonable timeline to complete the tasks. We recommend creating a timeline for these tasks, to record all the steps needed for a thorough, complete study.

Each project has a key date, from which you build all other deadlines. For example, start from:
- The end, if you have a targeted reporting deadline in mind, and backtrack to the beginning.
- The data collection date, if a specific event exists during which you ideally will gather data (before/after, only before, only after, ongoing, etc.) and work from that date both towards the beginning and end.
- The beginning, if you have no targeted deadline or "close date" for a certain event or intervention (this is rare).

The following sample timeline is based on a survey data collection process using the Qualtrics survey tool, which requires approval from Purdue's IRB. Planning steps may be condensed if IRB approval is not required; however, following IRB expectations helps to ensure you have a well thought out survey purpose and design. As the scope of a study grows (for example, more data collection points, different data collected, etc.) more steps and more time may need to be added to the process.

Phase	When	Tasks
Planning	ASAP	• Identify a problem, question, learning or developmental outcome, etc.. • Complete required trainings: CITI, FERPA, etc. • Request a Coeus account. • Determine roles: Primary Investigator (PI), Co-PI Key Personnel, etc. • Determine intended outcomes and/or study purpose. • Create research questions. • Determine population for study participants. • Determine prospective data analysis steps. • Determine prospective reporting, including any targeted deadlines.

	At least 10 weeks before	• Conduct a literature review. Identify:
		  ○ Relevant concepts and theories.
		  ○ Findings from related research.
		• Determine pre-existing data sources.
		• Determine pre-existing data collection methods. *(ex: Standardized inventory? Prior use of a similar survey?)*
		• Determine demographic data needed, and how to obtain these data. *(For students, use a Registrar's Data Agreement.)*

		•
	8-10 weeks before	• Begin completing the forms necessary for IRP approval. *Recommended: Seek in-person assistance from IRB staff to verify the correct documents are being prepared.* • Submit a Registrar's data agreement if student data are necessary

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Phase	When	Tasks

		• Set up survey content in Qualtrics.
		• Develop Qualtrics messages, for example:
		  o Invitations
		  o Reminders or Thank Yous
		  o Terminations
		• Develop non-Qualtrics messages, for example:
		  o Promotional fliers
		  o Promotional e-mails
		  o Gatekeeper e-mails
		  o Phone scripts
		• Seek feedback about survey content and messages from your stakeholders/audience.

	6-8 weeks before	• Finalize the survey content and messages. • Finalize the IRB forms. *Recommended: Seek assistance from IRB staff to review documents for feedback and possible errors in Coeus.* •
	6 weeks before	• Submit IRB documents via Coeus. *Note: 14 business days is the minimum wait time for a response. If revisions are required, the resubmission may take another 14 business days. Ideally, inserting at least an additional month here before your planned data collection gives additional time for IRB corrections.* • If revisions are required, respond ASAP.
	After IRB approval	• Set up approved messages within Qualtrics. • Set Qualtrics survey options *(ex: expiration, invitation, termination, etc.)* • Test the survey and revise settings or flow as needed.
	1-3 days before	• Obtain final contact list. *Recommended: Wait until as late as possible, if you have a list that can change such as a course roster.* • Create the Qualtrics contacts list. • Complete distribution steps based on pre-determined day/time.
Collection	Varies (1 day to 100 days)	• Distribute survey invitation.

		• Distribute survey reminder(s) to invitees who have not replied. For example:
		  o For a week-long survey, 2-3 days after invitation.
		  o For a month-long survey, every week.

Data Analysis Reporting	Depends on analyses desired	• Analysis and reporting vary considerably based on the data collected, analyses desired, and/or targeted audience or purposes. • Leave enough time to verify accuracy of any analysis and interpretation. • Qualitative (open-ended items in a survey) will always require more time for analysis.

Closure	After reporting complete	• Seek feedback from stakeholders, and modify the study design if it will repeat. • Thank all people involved in the study process- including respondents to your survey- sharing results and/or how the data was utilized to improve or change a certain aspect of their experiences with/at Purdue. • Submit closure documentation to IRB.

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