Lead Coder Procedures

Leading a coding team may require you to take on new types of responsibility. The *lead coder* is defined as the person who is responsible for **building and maintaining a team** that demonstrates reliable, accurate procedures and that **achieves coding goals** on time. You may be working with a small or large coding team, but regardless of the size you need to make plans in advance to ensure you have resources and procedures in place to successfully complete the coding task.

Consider the responsibility assignment descriptions and chart below and determine how your coding team will define roles and responsibilities using the RACI framework below.

- **R = Responsible** = The responsible person will do the work/task; they are the owner of the task.
    - For example, The lead coder is the person who performs day-to-day management of the coding team as well as coding themselves. Depending on the size of the team, the lead coder may have an equal or reduced coding goal; regardless it is essential that the lead coder actually code often to understand how the coding scheme is working and what can be improved. When clarifying questions arise about how to code a particular instructional event or how to use/secure project materials and resources, this manager is the first person consulted. The lead coder must consult with his/her supervisor/PI when key decisions must be made or a problem arises.
- **A = Accountable** = The person ultimately accountable for the final work.
    - The person ultimately accountable to the funding agency for the final coding product is usually a Principal Investigator (PI) of the project. This person makes key decisions or steps in when problems arise. Ideally the PI will have a small coding assignment throughout the study to understand the coding scheme fully; or at a minimum the PI must attend trainings that orient coders to the content.
- **C = Consulted** = Anyone who must be consulted with prior to a decision being made and/or the task being completed.
    - In some coding teams, there are Co-PIs or Co-Investigators at your site or other site that have a say in how the work gets done, so they must be consulted when key decisions are made.
- **I = Informed** = Anyone who must be informed when a decision is made or work is completed.
    - The entire team of coders must be in the communication loop around and decisions or changes to the coding approach. A process should be in place to keep *all* coders informed of decisions around codes. Questions arise frequently when using a new coding scheme such that it can be an iterative process to arrive at a working definition of the code for the data. Therefore, a communication process that includes face-to-face coding meetings must be accompanied by written communication that is pushed to all coders to keep the team informed of decisions or changes to the coding scheme.

Establishing clear roles at the outset of a coding project encourages strong communication among team members. In the hectic, complex task of coding, communication can be neglected or inefficient if these roles and responsibilities are not defined.

Sample RACI chart for Systematic Assessment of Book Reading (SABR) video/transcript coding project. Items with SABR templates/resources available are shown in blue font at first use.

Tasks	Lead Coder	PI	Co-PI/Co-I	Coders
Identify a list of coders or hire new **staff** (determine number of staff based on scope of data/work)	R	A	C	
Create a tracking sheet to **log** all data to be coded and a coding dashboard to **monitor** coding assignments/progress	R	C		
Organize all **materials/data to be coded** in a secure electronic location (consider organizing by priority levels, if needed)	R	A		I
Review **coding scheme** and training/reliability materials (manuals, powerpoints, training videos)	R	C	C	
Revise or add codes, as needed, to match your research goals. (*Review footnotes in manuals that suggest coding alternatives for consideration; if you expect your data to include multiple languages plan how this will be captured). Revise all training/reliability materials to match your changes.	C	R	C	
Determine **minimum reliability threshold** required for publication (e.g., ≥85% agreement; ≥95%)	I	R	C	
Review **master coded materials** (1 practice and 4 reliability transcripts and answer keys); this is a set of data (ideally from another study) coders use to demonstrate reliability. Save all answer keys in separate folder coders cannot access.	R	C	I	
Prepare for training your team. Practice coding before training to facilitate discussion with the team. Determine training agenda and assignments for PI and lead coder to facilitate 4-6 hour training(s).	R	R		
Send coding team **manuals to review** before training and coordinate **logistics of training**	R	I		I
Conduct a **training session** to explain and discuss the coding scheme and **practice group coding**	R	R	I	I
Give **independent practice coding assignments** with deadline to return to lead coder	R	I		R
Use practice transcripts/master coded answer keys to check coders' accuracy. Enter **practice scores** into reliability spreadsheet	R	I		
Provide coders with **feedback about practice** (Consult with PI to determine plan for written/oral feedback; individual or group feedback, based on trends.)	R	C		
Determine if additional group training or practice is needed or not. If so, **prepare clarifying/practice materials** (If the majority of coders are not reliable, gather team for retraining)	R	A		
Give **independent coding reliability assignment #1 and #2**; a minimum of two assignments must be coded reliably to be released for coding	R			R
Use reliability transcripts/master coded answer keys to check coders' accuracy. Enter **reliability coding scores** into reliability spreadsheet; calculate individual/group averages	R	I	I	
Determine if additional individual or group practice is needed; prepare **clarifying or extra practice materials** and send additional **reliability assignment #3** to coders who failed #1 or #2	R	A		
If needed, **adapt or revise codes** to fit your data; continue **problem solving** around coding content/process	C	R	I	I
When the number of reliable coders is known, **give coding assignments** (e.g., weekly coding goal) and remind coders of **process for tracking status of data** they are responsible for coding .	R	I		R
Establish p**rocedures to keep the team reliable** and **productive** (e.g., weekly meetings/calls to address questions at the beginning that taper as need; weekly emails from lead coder on overall team progress to goal).	R	C	I	I
Every 4-8 weeks formally **monitor possible drift** with a master coded assignment being given to all coders (can be explicitly called a drift check or implicity placed in individual's coding assignments). Check scores against two independent coders or master coded data from your project and enter drift check scores into reliability spreadsheet. Stop individual coders if below reliability threshold.	R	A		I
Monitor and maintain coding performance against coding goals for individuals and group. Adjust as need to fit timeline; Report on progress to the group at regular intervals (e.g., weekly).	R	A	I	I

Celebrate progress (e.g., Starbucks card to highest coder); **celebrate completion** of coding task.	R			