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## Coding Guide Part 2 – Selecting an extract

### 1. Getting Started

To code you first need to set up your screen with the tree nodes and document in the optimum configuration (We will set up the options for you). To do this open the document you want to code and then open the tree nodes. You will need to expand the tree from the bottom until it is fully open. You then set the screen to place the nodes next to the document.

3. Click here to set the screens alongside each other.

1. Coding density stripes show where you have coded. Place the cursor on the stripe to view.

2. Expand all the tree nodes by clicking the + sign

4. The document screen is expanded to allow easy reading of the text.

The screenshot shows the REMS software interface. On the left, there is a 'Nodes' panel with a tree structure. The 'Tree Nodes' panel is expanded, showing a list of nodes including '1. Qualifications', '2. Curriculum aims', and '3. Stakeholders'. The main document window displays a text extract with coding density stripes on the right side. The stripes are vertical bars of varying widths, indicating where text has been coded. The document text includes numbered paragraphs (15-18) discussing local ownership, agency, and collaborative provision. A callout box points to the stripes, stating '1. Coding density stripes show where you have coded. Place the cursor on the stripe to view.' Another callout box points to the tree nodes, stating '2. Expand all the tree nodes by clicking the + sign'. A third callout box points to the document window, stating '4. The document screen is expanded to allow easy reading of the text.' A fourth callout box points to the window title bar, stating '3. Click here to set the screens alongside each other.'

## 2. Coding an extract

Using the mouse, highlight an extract and then drag this to the appropriate child node and drop. The highlighting will remain on so then take the cursor back to the extract and drag to the next node.

The screenshot shows the NVivo software interface. On the left, the 'Nodes' pane is open, showing a 'Tree Nodes' list. The 'Diplomas' node is selected. The main text editor displays a document with a paragraph highlighted in black. A callout box labeled '1. Highlight the selected text to code.' points to this highlighted text. Another callout box labeled '2. Drag the highlighted text to the selected node.' points to the 'Diplomas' node in the tree. A third callout box labeled '3. Take cursor back to the highlighted text and drag and drop to the next node.' points to the highlighted text. The status bar at the bottom shows '106 Items', 'Nodes: 122', 'References: 605', and 'Read-Only'.

### 3. An overview – What to Code

The best way to understand the approach to coding is to review a document which the REMS team have already coded and try to understand the approach they adopted. The example in the table below shows the contents page of a QCA report in March 2007 'Developing Functional Skills'. If you open this document in NVivo you can place the cursor over the coding density stripes and see how the material has been handled. The stripes are illustrated on page 1.

The reasoning for this is provided in the table below

<p><b>Contents</b></p> <p>Executive summary .....4</p> <p>Introduction .....4</p> <p>Scope .....4</p> <p>Standards.....4</p> <p>Assessment.....5</p> <p>Manageability.....5</p> <p>GCSE.....6</p> <p>Access and DDA.....7</p> <p>Independent evaluation of the trials.....7</p> <p>Pilot arrangements.....8</p> <p>Introduction .....9</p> <p>Background.....9</p> <p>Methodology.....9</p> <p>Coverage.....10</p> <p>Trials.....10</p> <p>Research ..... 11</p> <p>Discussions and consultative activity ..... 11</p> <p>Standards.....12</p> <p>Mathematics.....13</p>	<p>In this report the coder would generally ignore the executive summary (pages 4-7). All the key evidence is in the body of the report and extracts from summaries tend to be bland.</p> <p>The introduction, scope and methodology were checked for evidence and only one extract coded.</p> <p>The in depth coding began at the standards section and the solid evidence in the body of the report is the most significant area for attention during coding</p>
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ICT.....	14	<p>In this particular report the recommendations were part of each separate section and although coding was lighter there were some significant evidence.</p> <p>Where recommendations were simply a list of actions they were not coded.</p> <p>The last sections were not coded as they simply provide information that QCA staff would be fully aware of</p>
English .....	14	
Assessment .....	16	
Mastery .....	16	
Assessment design.....	17	
Further Issues .....	19	
Recommendations and actions .....	21	
Manageability.....	23	
Recommendations and actions .....	27	
GCSE.....	28	
Assessment models.....	28	
Attainment and the 'hurdle' .....	29	
Mathematics.....	30	
English .....	31	
ICT.....	32	
Recommendations and actions .....	32	
Access and DDA.....	34	
Recommendations and actions .....	35	
Independent evaluation of the trials.....	36	
Pilot arrangements.....	37	

### 3.1. So the general rules are

- Ignore Executive Summary or overview. Skim introduction and methodology and only code if there is some cited evidence
- The body of the report will be the key area for evidence.
- Recommendations tend to be more lightly coded – read carefully and only select if they are telling you something different to the main body.
- The general rule is to ignore appendices unless they contain significant additional evidence.
- If you want to read the executive summary after coding, as there may be some important points.

## 4. Selecting the size of extract

The key to understanding the volume of text to highlight and select is to bear in mind what this tells someone undertaking analysis and how it fits with other extracts. Our initial experience of analysis has shown that larger extracts are more difficult to deal with and take longer to grasp during a read through especially when a coding query might return over 100 such references. The guidance is as follows.

- Decide what the evidence is telling you
- The minimum you should select is a sentence
- The maximum is a paragraph
- If a paragraph is making 2 distinct points which will be in separate nodes divide it into 2 separate references

### 4.1. Examples

The first example is drawn from a text search where the extract is expanded to take the surrounding paragraph. What you should notice is that the length of each extract varies but gives sufficient information to enable the person reading to draw the meaning or evidence.

<p><a href="#">&lt;Documents\Coded Documents\2006-06-R2-QCA-Report of Consultation on Draft Functional Skills Standard++&gt; - § 4</a>                  references coded [5.33% Coverage]</p> <p>Reference 1 - 2.11% Coverage</p> <p>Functional skills will impact directly on the design and awarding of GCSEs in English, maths and ICT and are planned to replace, in time, the Adult Numeracy, Adult Literacy and key skills qualifications in England and this was felt to be of concern. In relation to GCSEs, many respondents felt that it should be accepted that the achievements in GCSEs would drop with the introduction of a level 2 Functional Skills hurdle or requirement.</p> <p>A further concern expressed by respondents in relation to access and DDA compliance was that further thought needs to be given about how the new Functional Skills qualifications are constructed and about the impact of the proposed Functional Skills hurdle for candidates with special requirements. A more flexible structure to the qualification, a real option to just achieve GCSE or functional skills and a choice of assessment models were noted as positive ways forward to assist the passage for candidates with special needs.</p> <p>Reference 2 - 0.88% Coverage</p>	

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<p>Functional skills will impact directly on the design and awarding of GCSEs in English, maths and ICT and are planned to replace, in time, the Adult Numeracy, Adult Literacy and key skills qualifications in England. In relation to GCSEs, many respondents felt that it should be accepted that the achievements in GCSEs would drop with the introduction of a level 2 Functional Skills hurdle or requirement.</p> <p>Reference 4 - 0.32% Coverage</p> <p>Many respondents expressed concern about the impact of the proposed hurdle/requirement for level 2 functional skills on GCSE achievement rates.</p> <p><a href="#">&lt;Documents\Coded Documents\2006-09-RX-Other-JH-lessons learned summary+&gt;</a> - § 1 reference coded [1.49% Coverage]</p> <p>Reference 1 - 1.49% Coverage</p> <p>Key skills in GNVQ and functional skills in Diploma is also a valid parallel. Key Skills achievement was eventually removed from GNVQ because it was causing failure to complete and/or bad assessment practice in centres to get the students over hurdle</p>	

The second extract is taken from the same text search and in this example the text selected tends to be in single sentences or bullet points. This is because they each cover a separate element of the evidence

<p><a href="#">&lt;Documents\Coded Documents\2008-03-R2-NFER Report on Functional Skills Pilot+++&gt;</a> - § 29 references coded [4.76% Coverage]</p> <p>Reference 1 - 0.12% Coverage</p> <ul style="list-style-type: none"> <li>• Strong feelings arose regarding the 'hurdle' models, i.e. the need to pass each of the three elements of English separately in order to gain a pass overall, and the need to pass the FS assessment in order to gain a related qualification such as a GCSE or a Diploma. These hurdles were very unpopular with many awarding bodies.</li> </ul>	
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Reference 2 - 0.03% Coverage

- The matter of the hurdle model was also felt to be a potential barrier for many learners.

Reference 3 - 0.08% Coverage

- Opinion was divided on difficulty, with mathematics considered to be the most demanding subject by some awarding bodies, while the marking hurdle in English gave this the highest difficulty rating for others.

Reference 4 - 0.06% Coverage

- Until arrangements regarding the phasing out of key skills and the GCSE hurdle are confirmed, some feel that centres will be reluctant to invest resources in development.

Reference 5 - 0.06% Coverage

- The hurdle model for English raised issues of comparability as well as technical challenges. Awarding bodies want more research and discussion about this issue.

Reference 6 - 0.07% Coverage

**The issue of hurdles was again raised. There is a strong belief that the existence of hurdles within English and between FS and other qualifications will impact on attainment.**

Reference 8 - 0.10% Coverage

- The hurdle of achieving the FS award in order to achieve a Diploma was seen as restrictive. There are also concerns about the skills and experience required to effectively integrate functional skills into the Diploma programmes and to teach the functionality aspects.

Reference 9 - 0.13% Coverage

- Some awarding bodies felt that English might be the most difficult subject in which to achieve, given that compensation between units is not permitted. There was a feeling that the number of criteria might be seen by candidates as a seemingly endless hurdle and some would like to see FS English assessment integrated with GCSE English assessment.



Reference 10 - 0.12% Coverage

Commonly raised issues for candidates were the open nature of some of the assessment, particularly in mathematics and the hurdles present in the structure for English. One body plans to decrease the amount of structure provided for candidates as the pilot progresses. The logistics of ICT testing were also commonly raised.

#### 4.2. So the general rules are

- There is no hard and fast rule to the size of the extract.
- Selecting whole pages or large paragraphs presents a problem later in the process.
- Take only what is needed from the paragraph that makes the point clearly for the later user.
- We would rather have paragraphs split than coded to multiple nodes.
- If you code to 7-8 nodes then the same large paragraph will keep coming up in queries or searches and the reader has to select out the relevant point to that node - this becomes cumbersome.
- Try to keep the extract succinct but with enough information to maintain sense
- Ensure if possible the context is clear in the extract. If necessary use annotations to do this (see next page)

## 5. Adding annotations

The screenshot shows the REMS software interface. On the left is a 'Tree Nodes' panel with a hierarchical list of categories and sub-items. The main window displays a document titled '2007-03-R1-QCA-LA & LSC Conf' with text content. A callout box points to an annotation button in the top toolbar. Another callout box points to a highlighted word 'highlight' in the text. A third callout box points to an 'Annotations' table at the bottom of the document view.

**Tree Nodes**

- 14-19 Education
  - Alevels
  - Apprenticeships
  - Diplomas
  - Extended project
  - Foundation Learning Tier
  - Functional skills
  - GCSEs
  - HE Modules
  - Personal Learning and Thinking Skills
  - Pre 14
  - Proprietary quals
  - vGCSEs
  - X Other quals
- 2. Curriculum aims
  - Engagement
  - Flexibility
  - Improving assessment
  - Increased choice
  - Motivation & participation
  - Opportunities for all
  - Personalisation
  - Progression
  - Raise achievement levels
  - Reconfigure curriculum offer
  - Strengthening skills
  - Stretch & challenge
  - Vocational route
  - X Other curriculum aims
- 3. Stakeholders
  - Awarding bodies
  - Employers
  - FE
  - HE
  - LEA
  - Other centres
  - Parents
  - Regulator
  - Schools
  - Teachers
  - X Other stakeholder interests

**Document Content:**

using QCA PLTS framework terms in this case. In other aspects they are used to look at areas where an additional qualification can be gained. Other terms for PLTS are also used such as emotional intelligence, critical skills, thinking skills.

**Advice and guidance for students and parents**

Independent, impartial advice is crucial but this may prove problematic to deliver. Delegates thought that a culture of career development would be most helpful, this should include IAG. Career development needs to be built into the curriculum in order that students and other stakeholders can see where the qualifications and subjects they are studying could take them.

33. To encourage this development in London it was suggested working with a Pan-London Prospectus. This develops career progression and each school/college will be online in 2007.

34. However this could pose the following issues:

- online access will not be available for some parents. Hard copies should be made available. It should be clarified where they are held and regularly updated
- the cost to produce hard copies and ensuring the site is updated regularly
- advisors working with the prospectus will need to be well informed and trained
- curriculum materials will need to be developed in order to support the career development implications of the prospectus and to encourage engagement with it.

35. Entitlement to IAG should be given a higher profile to support young people better. It should be continuous IAG – and not just available to guide them onto the course. All this IAG needs to be linked to the individual learning plan (ILP). Work on it should have started already, as it has to reach parents, students and staff.

36. Getting higher education institutions involved is a top priority - if parents and carers knew that HE supported the diploma they would be more confident in making choices as the benefits would be obvious.

37. It is important to get progression advisors up to speed – they don't understand the work-based learning route. This also applies for every single individual in

**Annotations**

Id	Content
1	in 14-19 Curriculum

2. Click the annotation button and the additional screen appears at the bottom.

1. The extract is about 14-19 curriculum but this is not explicit so highlight a selected word.

3. The annotation screen allows you to add the context.

## 6. Coding an extract - some Examples

### 6.1. Pointers

- Coding is not an exact science and often forces a choice as the extracts below indicate.
- Sometimes the stakeholder is not obvious and so some guesswork is needed around the context of the report or proceeding paragraphs. If you can't identify this then it should not be coded.
- Curriculum aims are often a challenge and there is some interpretation required.
- There are some obvious clues like the naming of a specific subject or the fact that concerns are expressed (Perceptions)

Extract	Code to
<p>Stockley Academy has also written their own <b>assessment scheme</b> for <b>PLTS</b>. This proved to be a difficult task both in writing the scheme and ensuring it was phrased in a positive way. It was also felt that this was yet to be embedded across the whole <b>school</b>. In Wolverhampton students keep an online record of PLTS. This can be continually updated as students achieve targets and develop skills and information can then be recalled as appropriate. All delegates are keen to <b>develop PLTS in the curriculum and see this as an integral part of each student's learning.</b></p>	<ol style="list-style-type: none"> <li>1. Qualifications – PLT</li> <li>2. Curriculum Aims – Strengthening skills</li> <li>3. Stakeholders – Schools</li> <li>4. Delivery – Curriculum Offer</li> <li>5. Assessment – Assessment models</li> </ol> <p>This enables the PLT team to find evidence of what centres are planning for assessment and if or how it will be made available to learners. Strengthening skills comes from the PLT context</p>
<p><b>Delegates were concerned</b> about the time that will be used for <b>controlled assessment</b> including taking the task. It was thought it will go down a similar route as <b>coursework</b>. It is likely that there will be limited range as students will do projects that best suit their skills. Whatever you do the outcome will mean people use a narrow range that best advantages their students in terms of tasks.</p>	<ol style="list-style-type: none"> <li>1. Qualifications – GCSEs</li> <li>2. Curriculum Aims – Improve assessment</li> <li>3. Stakeholders – Schools &amp; FE</li> <li>4. Delivery – Perceptions of Delivery</li> <li>5. Assessment – Controlled Assessment</li> </ol> <p>Coursework gives the link to GCSEs. While no centre is identified the context of the report indicates it is most likely schools or FE. The concern comes under perceptions.</p>
Extract	Code to -

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<p>They have found that discussions with centres so far suggest this should not present too much of a challenge to those already working successfully with the key skills qualifications and used to <b>competence-based assessment</b>. However, <b>ABI</b> noted that some of its centres had expressed a desire for a <b>transition period</b>, in order to familiarise themselves and the learners with the different method of assessment.</p>	<ol style="list-style-type: none"> <li>1. Qualifications – Functional skills</li> <li>2. Curriculum Aims – Raise Achievement</li> <li>3. Stakeholders – Awarding Bodies</li> <li>4. Delivery – Perceptions of Delivery</li> <li>5. Assessment – Assessment Models</li> <li>6. Issues - Timescale</li> </ol> <p>The report was about functional skills and the issue suggests that the introduction of a new qualification might be difficult for learners - so achievement. AB = Awarding Body and transition period is about timescale</p>
<p>ABH also commented on the <b>English</b> hurdle, and the need to <b>pass</b> all three components. Similarly, <b>ABC</b> was concerned about the mathematics standards, which require <b>learners to show independence</b> in choosing and applying the <b>mathematics</b> for a task. <b>ABC</b> believes that this is difficult for learners, particularly in the early stages of the pilot. It favours an approach of gradual reduction of the <b>structure within tasks</b> through the life of the pilot as learners and teachers become more familiar with <b>functional skills</b> assessments.</p>	<ol style="list-style-type: none"> <li>1. Qualifications – Functional skills</li> <li>2. Curriculum Aims – Achievement</li> <li>3. Stakeholders – Awarding Bodies</li> <li>4. Learner - Learner Capabilities</li> <li>5. Delivery – Subject specific</li> <li>6. Assessment – Assessment Models</li> </ol> <p>Quite hard to identify aims but the potential impact on pass rates is clear. Learners need to show independence is about capabilities</p>
<p>Delegates were very clear that <b>Diplomas</b> and traditional qualifications should not be taught separately. They felt it was important that Diploma students <b>were not taught in isolation</b> and that both programmes had the opportunity to <b>integrate</b>. This is especially important given that the small numbers of students who are likely to study for the Diploma in the first cohorts.</p>	<ol style="list-style-type: none"> <li>1. Qualifications –Diplomas</li> <li>2. Stakeholders – Schools</li> <li>3. Delivery – Curriculum offer</li> <li>4. Pedagogy – Integration or classroom practice</li> <li>5. Issues – Creating a Ghetto ??</li> </ol> <p>Schools comes from the report context and the curriculum offer is selected because of the way the programmes are made available. Either integration of classroom practice are suitable and the issue is about ensuring diploma students are not isolated</p>