

Presentation by

Felix Ritchie

**Professor of
Applied
Economics**

**Director,
Bristol Centre
for Economics
and Finance**

Training research output checkers

Date

Background

Motivation

- increasing demand for output checking in research facilities
 - very few fully rules-based => subjective judgment needed
- checker training mostly by 'grandfathering'
- guidance mostly from SDC literature
 - little on people management

⇒ can we train checkers more formally?

Research outputs compared to NSI outputs

- research outputs
 - have much wider range of types
 - are transformed and subsetting in idiosyncratic ways
 - do not have the same requirements for consistency
- produced by individuals
 - to their own purposes
 - to their own standards of explanation
 - with limited training in SDC
 - with a different perspective on risk
- In summary: low risk but complicated

Structure

Learning objectives

1. Building confidence
 2. Understanding subjectivity
 3. Dealing with the unknown
 4. Developing interpersonal skills
- (Developing output checking community)

Structure

- 60% of time: statistical skills
- 40%: understanding and managing users

- All based on group discussion
 - very little formal instruction

- Pre-reading (tested)
 - post-course reading (for reference)

Developing statistical skills

- Show groups a sample output
- Get them to
 - review
 - decide
 - draft points to be made to the researcher
- repeat with increasing complexity
- But: add pressure to make decisions

Ex 1.1A

Note to SRS team

These results are from the Survey of Charity Finances. I've used the subset of charities who have accounts for at least 4 years in the period 2010-2015, split between charities who survive and those which closed down. The outputs consist of

- The graphs below
- A clean log file "basic_stats.smcl" with descriptive statistics. There are no disclosure risks in the data as the stats are based on all the observations.
- The Stata code file "charity_analysis.do" so you can check the results if need be

Thanks!

Costs and assets as share of income

Category	closed, small	live, small	closed, big	live, big
Staff costs	~60%	~30%	~40%	~30%
Non-staff costs	~60%	~60%	~50%	~60%
Assets	~180%	~260%	~40%	~170%

Number of months income cover represented by assets

Months	closed, small	live, small	closed, big	live, big
None	~5%	~5%	~20%	~5%
1-3 months	~28%	~20%	~35%	~25%
4-6 months	~20%	~15%	~25%	~15%
7-12 months	~15%	~15%	~5%	~20%
>1 year	~5%	~5%	~5%	~15%
>2 years	~15%	~28%	~15%	~15%

Ex 1.1A

Assets as a share of total income over time

Assets as % of total income

Developing interpersonal skills

- Groups identify 'top ten' user problems
 - and solutions
- Review types of users

Assessment

- 70% four outputs
- 30% for 400-word essay
 - Round 1: pros and cons of defining scatter plots as 'safe statistics'

Lessons learned








Statistical skills

- Very hard to break default-closed conditioning
 - possible risk vs meaningful risk
 - not utilising 'safe statistics' tool
 - 'chain of events' reasoning important
- Better at suggesting solutions to researchers
- Test results:
 - still default-closed for linear/descriptive stats
 - models: better but not using key lessons
- - Unknown: is this still seen as an exercise?

Interpersonal skills

- Initially needed much more work
 - first pilot repetitive and unclear
 - 'top ten' developed on the fly in discussions
- Partially assessed
 - shows more guidance needed on how to draft emails

Learning objectives, post-pilot

1. Building confidence  
2. Understanding subjectivity  
3. Dealing with the unknown 
4. Developing interpersonal skills  

Next steps

- Material seems to work in class
 - Exam shows possible ongoing problems with
 - taking responsibility
 - having confidence in guidance for models
 - default perspective?
- ⇒ redesign facilitation to directly challenge
- ⇒ review assessment
- ⇒ reflective diary better?
- Looking for further input from other NSIs

Questions?

- felix.ritchie@uwe.ac.uk