03 June 2026

From Pilot to Practice:

A Framework for Testing AI Tools in Evaluation

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Introductions

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Agenda

- Context
- De-Identification
- Transcription & Translation
- Qualitative Coding
- Closing Remarks

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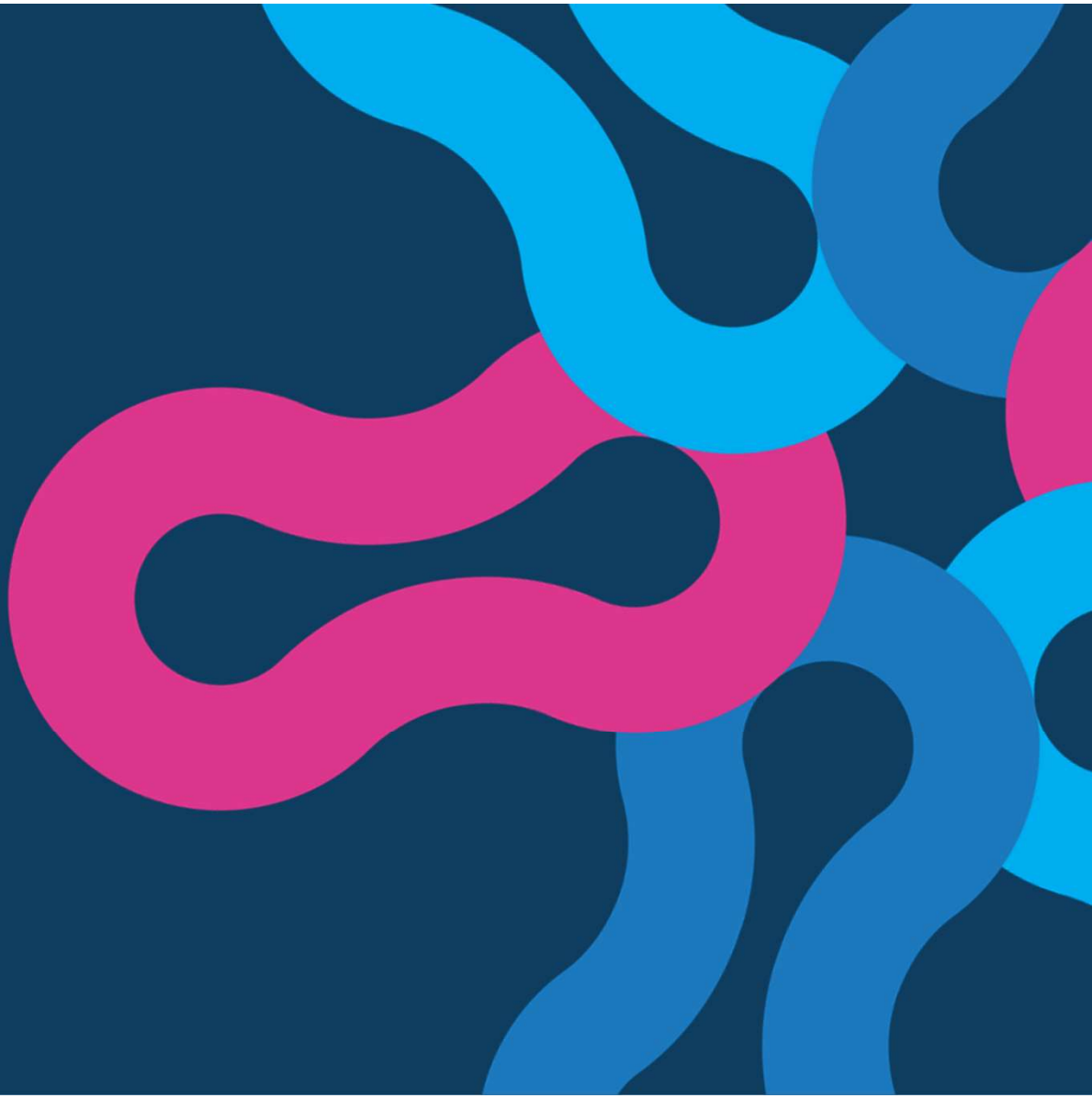
Context



How do we decide when AI is good enough to use in evaluation?

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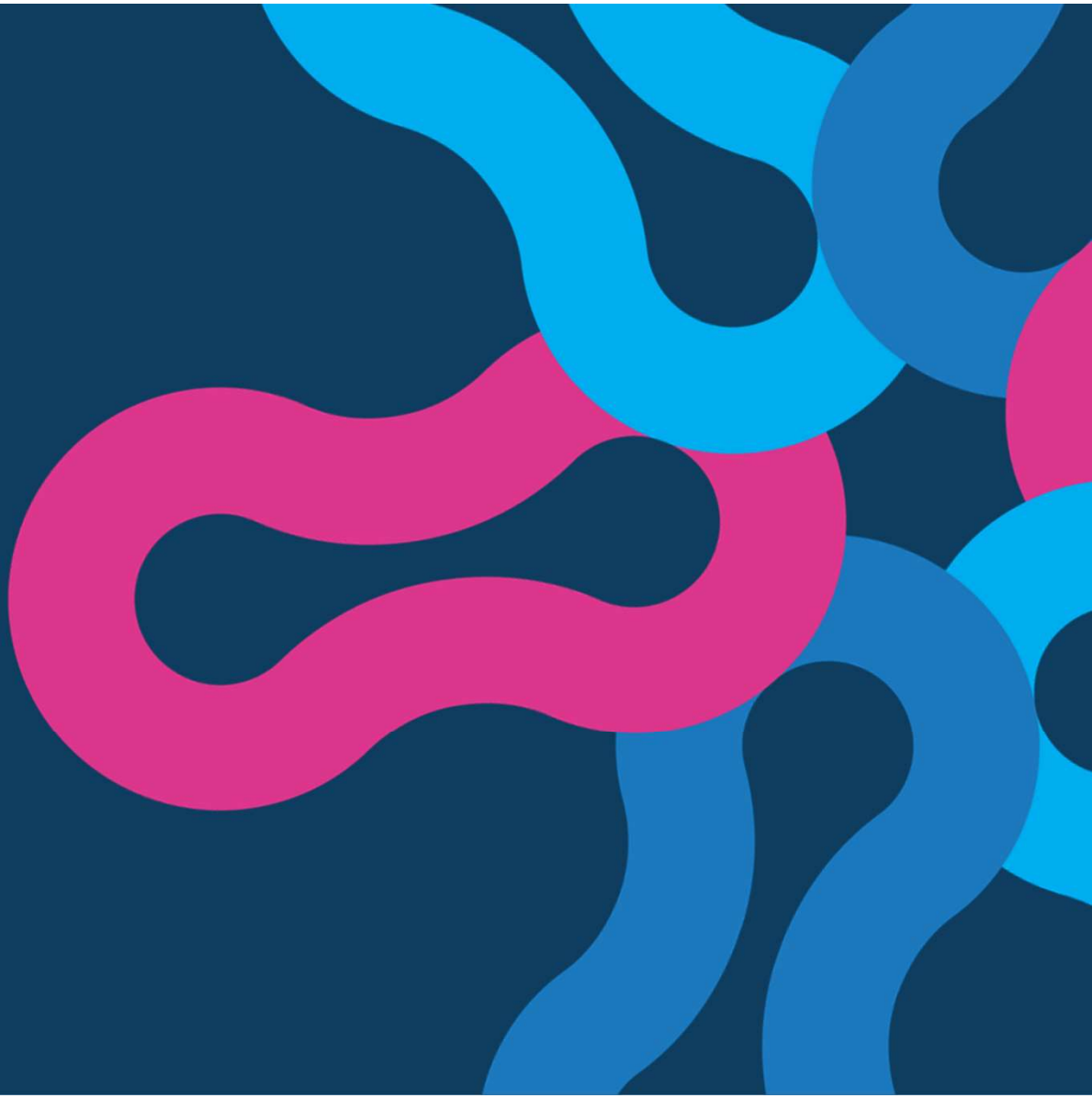
Piloting Overview

- Qualitative Data De-Identification
- Transcription & Translation
- Qualitative Coding

Qualitative Data De-Identification



Data De-Identification

Pilot Process

- Used ChatGPT (chat, project, custom GPT)
- Methodically tested numerous prompts and provided examples to help guide the LLM

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Data De-Identification

Pilot Results:

- Performance was inconsistent:
  - Sometimes identifying entire paragraphs rather than specific data points
- Decided to revert to manual deidentification
  - Transcripts already had most direct identifiers removed

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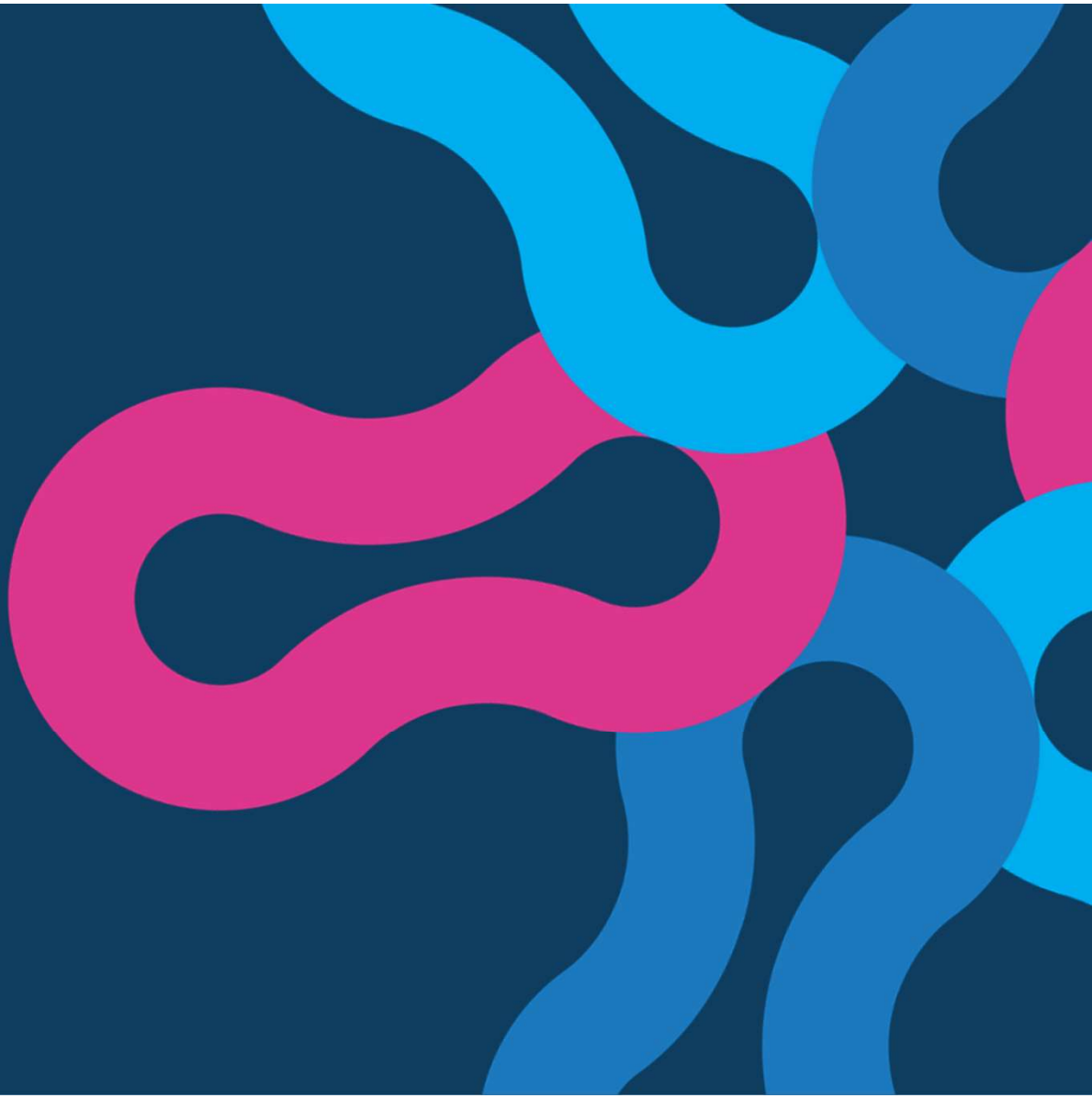
Transcription & Translation



Transcription

Pilot Process:

- Tested 3 tools: MaxQDA, Sonix, and Happy Scribe
- Using a standardized scoring matrix

Quality Criteria

-Completeness

-Additions

-Accuracy

-Management of Overlapping Speech

Platform Criteria

-Cost

-# of Languages Covered

-Security Protocols

-Transcript Editing Options

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Transcription

Pilot Results:

happyscribe 8.3/10 Performed the best (also cheapest)

SONIX 8.3/10 Performed well (but more inferences)

MAXQDA 7.6/10 Ok quality (no translation option)

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Translation

Pilot Process:

- Tested 2 tools: Sonix and Happy Scribe
- Used a standardized scoring matrix

Quality Criteria

-Completeness

-Additions

-Accuracy

-Flow

Platform Criteria

-Cost

-# of Languages Covered

-Security Protocols

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Translation

Pilot Results:

happyscribe 9.5/10 Performed the best (also cheapest)

sonix 9.4/10 Performed well (but more inferences)

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Translation

Translation Pilot Results:

happyscribe 9.5/10 Performed the best; also cheapest

sonix 9.4/10 but more inferences; struggled with accents

AI tools offer significant efficiencies, even w/o 100% accuracy

- Saved $30,000+ on MCC Niger Evaluation

Piloting with other languages, scaling with French

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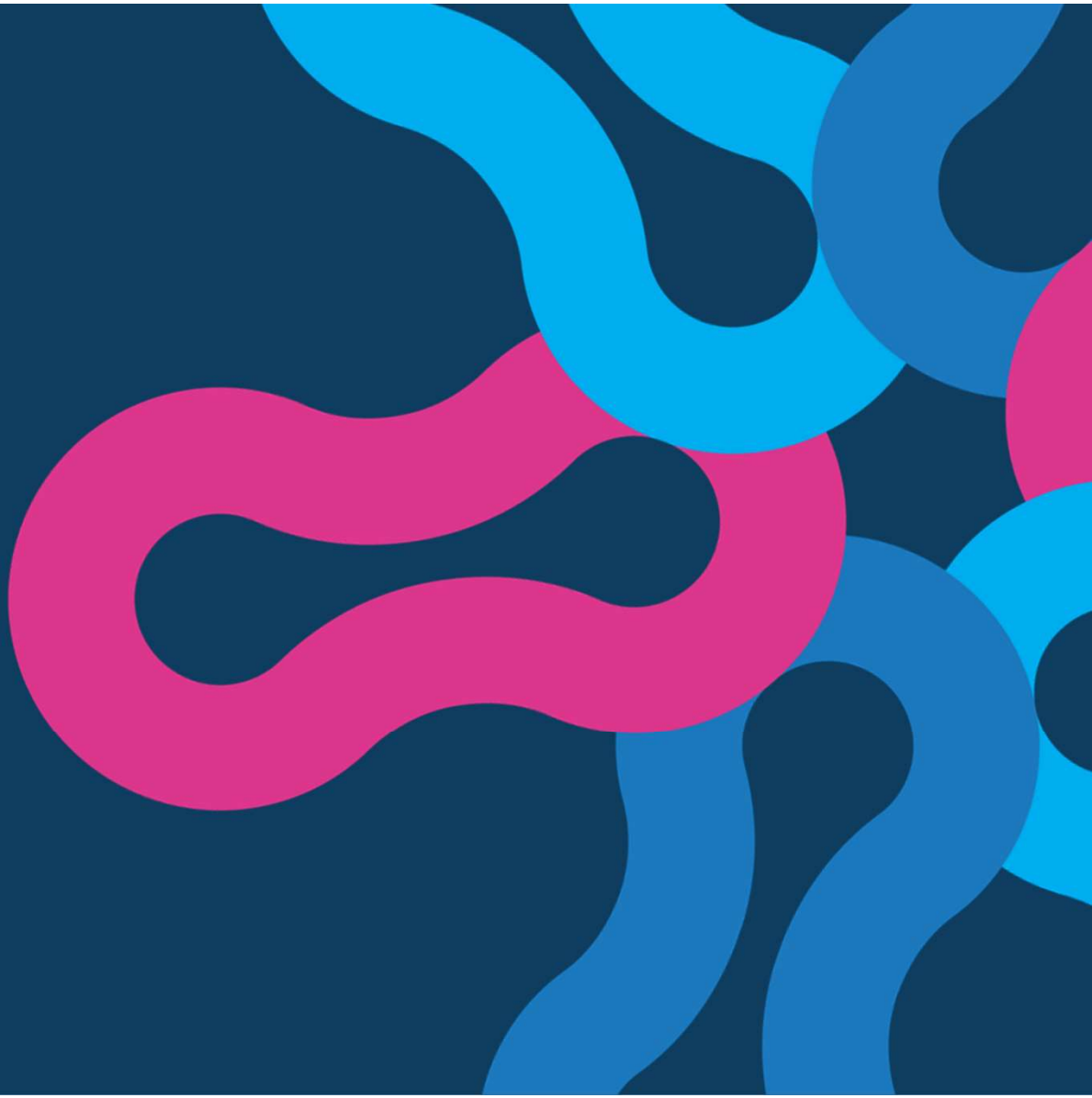
Transcription & Translation

Factors to Consider:

- Audio quality significantly affects output
- “Common” vs “Uncommon” languages
- Accents matter
- AI “helping” to make conversations “make sense”
- Glossary tools are (currently) minimally helpful
- Human review of AI output is essential

Qualitative Coding



Qualitative Coding

Pilot Process

MAXQDA

Claude

OpenAI

Gemini

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AI Coding Configuration

AI coding depends on guiding the model — grounding it in the study, constraining how it applies codes, and verifying every result.

Inputs & Grounding

What the model sees

- Project context
- Code examples
- Codebook scope

Grounds the model in the specific study and codebook rather than generic priors

Coding Behavior

How the model applies codes

- Sensitivity
- Coding frequency
- Code overlap
- Quote length

Aligns the model's output with the research team's coding conventions

Validation & Quality Control

How each coding is validated

- Confidence threshold
- Quote verifier
- Multi-pass consistency
- Borderline handling

Ensures every coding passes a validation gate before it is retained

Model & Reproducibility

Which model runs the analysis, and how consistently

- Model selection
- Reasoning effort
- Codebook shuffle

Selects the appropriate model per task and controls determinism and ordering bias

Dashboard

ORGANIZATION

Knowledge Management

Literature Review

Qualitative Analysis

TOOLS

AI Chat

ADMIN

Users

Usage & Cost

Audit Log

AI Models

My usage

Sign Out

4206 coded passages in disagreement · 0 resolved · 4206 open

Raters

ref: Reference · Senegal Reform RBF - Manual Only · 9 of 9 selected

Select all | Deselect all

Reference: **Reference · Senegal Reform RBF - Manual Only · May 26, 1:34 PM**

Compared against: **All 8**

Filters

Scope: All 13 themes · all 65 codes · all 12 transcripts

Themes: **All 13**

Codes: **All 65**

Transcripts: **All 12**

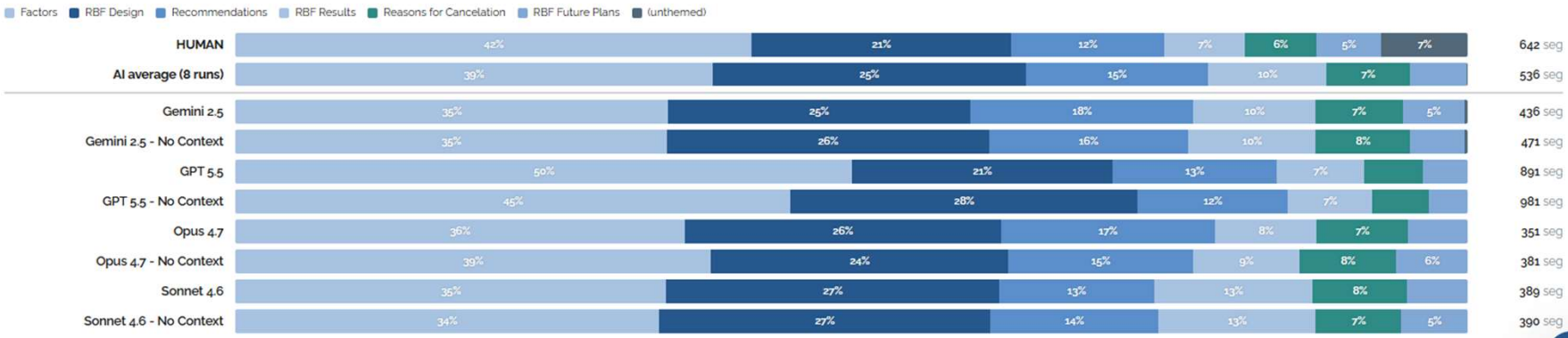
Apply filters

Visualization

Reference + 8 AI runs

VIEW: Themes | Codes | Heatmap | Segment length | Cost vs. quality | Hallucination

Each row is a rater. Bar segments show what fraction of their total coding went into each top-level theme. The "AI average" row directly below the reference is the mean share across every selected candidate. Hover a segment for the count; click a theme in the legend to highlight it across raters.



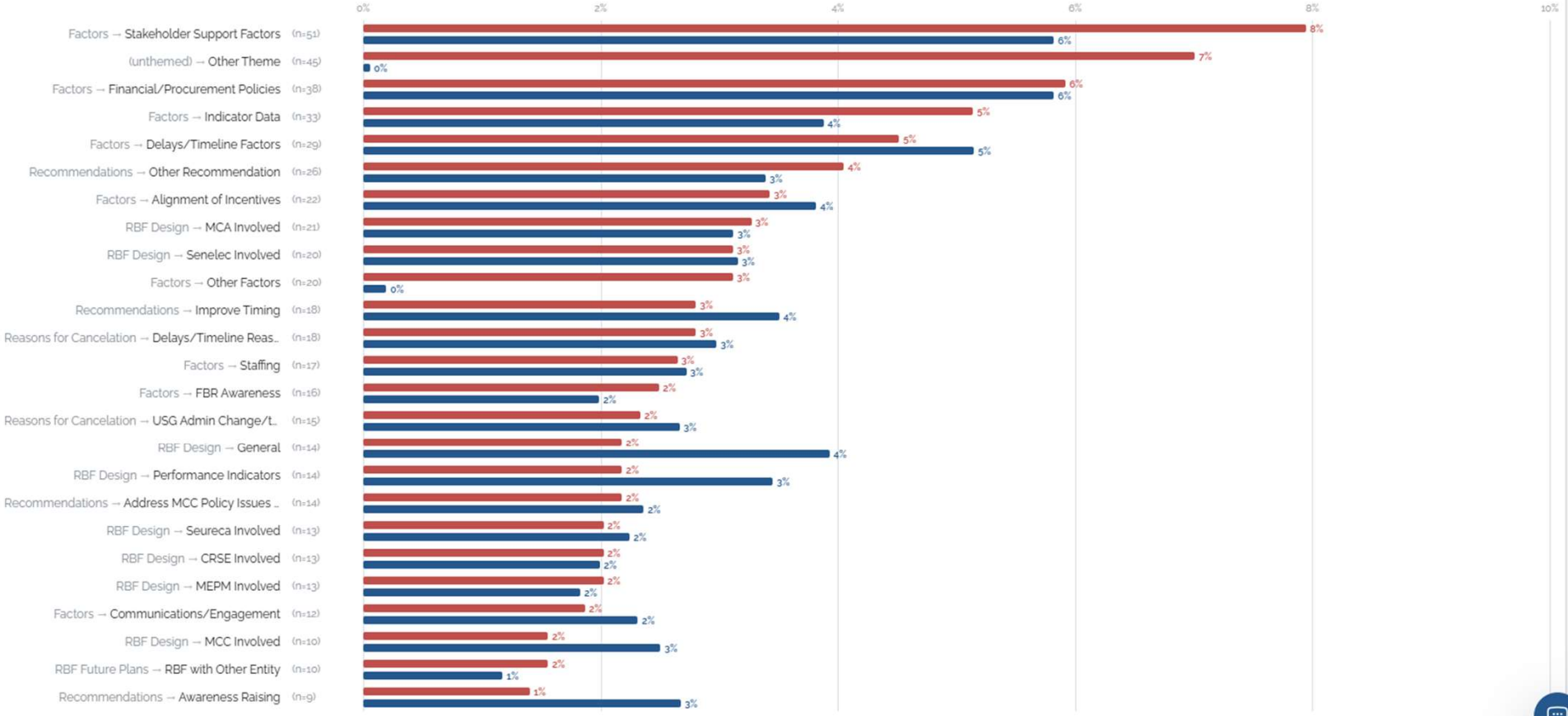
Tip — the human reference and AI rows that match the same colour profile share an analytical focus. Where AI bars lean heavily toward themes the human didn't touch (e.g., **RBF Design**), the model is coding material the researcher chose to skip for this corpus.

MCC Senegal Reform (REVISED) | 1. Inputs → 2. Refinement → 3. Coding → 4. Reconciliation → 5. Results → 6. Reporting

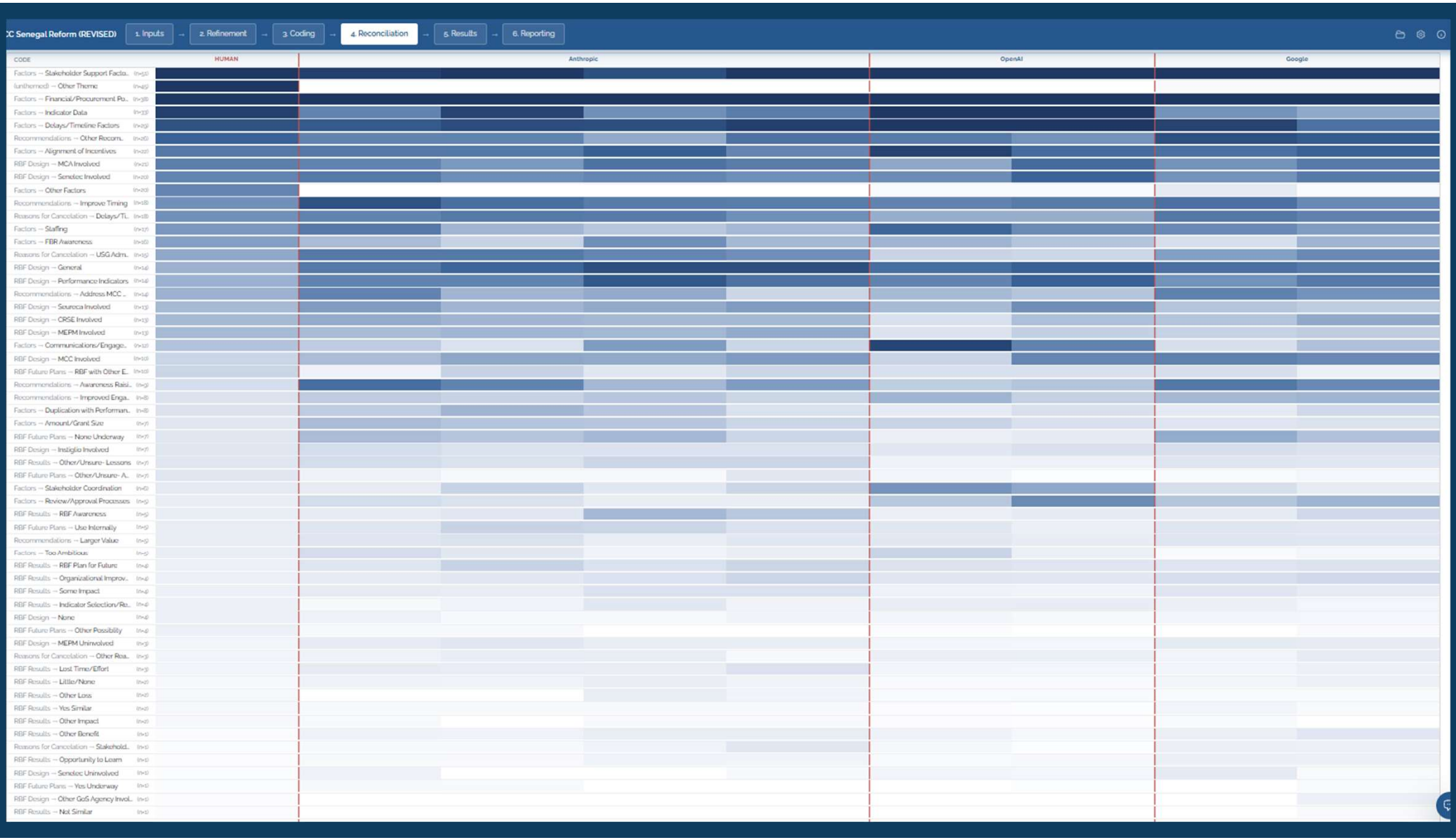
VIEW: Themes | Codes | Heatmap | Segment length | Cost vs. quality | Hallucination

Each pair of bars compares the share of the human's coding (red) vs the AI average across 8 of 8 candidate runs (blue). Codes are ranked by human-reference prevalence (descending), then by AI average for codes the human didn't use.

Sort by: Human-frequency desc | Codes: Top 25 | Theme: All themes | Rounding: On | Runs in average: 8/8



Showing 25 of 62 codes


C Senegal Reform (REVISED)
1. Inputs
2. Refinement
3. Coding
4. Reconciliation
5. Results
6. Reporting
CODE
HUMAN
Anthropic
OpenAI
Google
Factors → Stakeholder Support Facto.. (n=51)
(unthemed) → Other Theme (n=45)
Factors → Financial/Procurement Pa.. (n=38)
Factors → Indicator Data (n=33)
Factors → Delays/Timeline Factors (n=29)
Recommendations → Other Recom.. (n=26)
Factors → Alignment of Incentives (n=22)
RBF Design → MCA Involved (n=21)
RBF Design → Senelec Involved (n=20)
Factors → Other Factors (n=20)
Recommendations → Improve Timing (n=18)
Reasons for Cancelation → Delays/Ti.. (n=18)
Factors → Staffing (n=17)
Factors → FBR Awareness (n=16)
Reasons for Cancelation → USG Adm.. (n=15)
RBF Design → General (n=14)
RBF Design → Performance Indicators (n=14)
Recommendations → Address MCC .. (n=14)
RBF Design → Seureca Involved (n=13)
RBF Design → CRSE Involved (n=13)
RBF Design → MEPM Involved (n=13)
Factors → Communications/Engage.. (n=12)
RBF Design → MCC Involved (n=10)
RBF Future Plans → RBF with Other E.. (n=10)
Recommendations → Awareness Raisi.. (n=9)
Recommendations → Improved Enga.. (n=8)
Factors → Duplication with Performan.. (n=8)
Factors → Amount/Grant Size (n=7)
RBF Future Plans → None Underway (n=7)
RBF Design → Instiglio Involved (n=7)
RBF Results → Other/Unsure- Lessons (n=7)
RBF Future Plans → Other/Unsure- A.. (n=7)
Factors → Stakeholder Coordination (n=6)
Factors → Review/Approval Processes (n=5)
RBF Results → RBF Awareness (n=5)
RBF Future Plans → Use Internally (n=5)
Recommendations → Larger Value (n=5)
Factors → Too Ambitious (n=5)
RBF Results → RBF Plan for Future (n=4)
RBF Results → Organizational Improv.. (n=4)
RBF Results → Some Impact (n=4)
RBF Results → Indicator Selection/Re.. (n=4)
RBF Design → None (n=4)
RBF Future Plans → Other Possibility (n=4)
RBF Design → MEPM Uninvolved (n=3)
Reasons for Cancelation → Other Rea.. (n=3)
RBF Results → Lost Time/Effort (n=3)
RBF Results → Little/None (n=2)
RBF Results → Other Loss (n=2)
RBF Results → Yes Similar (n=2)
RBF Results → Other Impact (n=2)
RBF Results → Other Benefit (n=1)
Reasons for Cancelation → Stakehold.. (n=1)
RBF Results → Opportunity to Learn (n=1)
RBF Design → Senelec Uninvolved (n=1)
RBF Future Plans → Yes Underway (n=1)
RBF Design → Other GoS Agency Invol.. (n=1)
RBF Results → Not Similar (n=1)

MCC Senegal Reform (REVISED) | 1. Inputs → 2. Refinement → 3. Coding → 4. Reconciliation → 5. Results → 6. Reporting

Visualization | Metrics | Agreement | Compare | Finalize

4206 coded passages in disagreement · 0 resolved · **4206** open 0%

Raters ref: Reference · Senegal Reform RBF - Manual Only · 9 of 9 selected — Select all | Deselect all

Reference: **Reference · Senegal Reform RBF - Manual Only · May 26, 1:34 PM**

Compared against: **All 8**

Filters Scope: All 13 themes · all 65 codes · all 12 transcripts

Themes: **All 13** | Codes: **All 65** | Transcripts: **All 12**

Apply filters

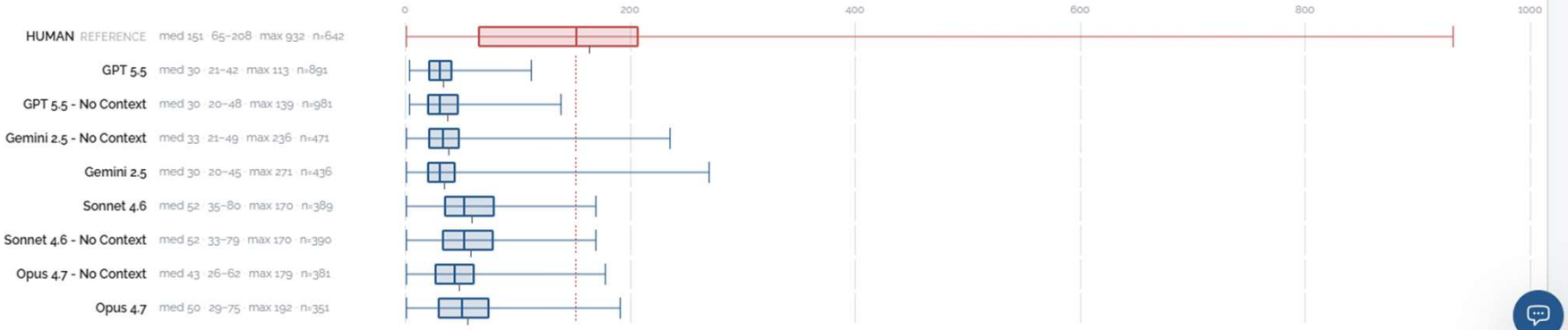
Visualization

Reference + 8 AI runs

VIEW: Themes | Codes | Heatmap | Segment length | Cost vs. quality | Hallucination

Each row is one rater's segment-length distribution. The box spans p25–p75 (the middle 50%), the vertical line inside is the median, and the whiskers reach the min and max. The black tick is the mean. A dashed red line crosses every candidate row at the human reference's median, so AI distributions shifted left or right pop visually.

Theme: All themes | Code: All codes



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Themes: **All 13**

Codes: **All 65**

Transcripts: **All 12**

Apply filters

Comparison | Inter-Rater Reliability | Segment Length

Filters

	DESCRIPTIVE						AGREEMENT							
Rater	Transcripts	Codes	Segments	Codes / Tx	Segs / Tx	Mean Seg Length	Attention F1	Theme Agreement	Code Agreement	Segment F1	Code F1	Cohen's κ	Gwet's AC1	Coverage
★ Reference · Senegal Reform RBF - Manual Only reference	12 / 12	59	642	25.9	53.5	164	—	—	—	—	—	—	—	—
Opus 4.7 - No Context Claude Opus 4.7 · No context	12 / 12	52 (−7 / 12%)	381 (−261 / 41%)	22.2 (−3.8 / 14%)	31.8 (−21.8 / 41%)	48 (−116 / 71%)	0.07	0.30 (n=47)	0.00 (n=47)	0.00	0.78	0.65	0.69	0.72
Opus 4.7 Claude Opus 4.7	12 / 12	54 (−5 / 8%)	351 (−291 / 45%)	21.8 (−4.1 / 16%)	29.3 (−24.3 / 45%)	56 (−108 / 66%)	0.09	0.37 (n=62)	0.00 (n=62)	0.00	0.78	0.66	0.70	0.72
Gemini 2.5 - No Context Gemini 2.5 Pro · No context	12 / 12	60 (+1 / 2%)	471 (−171 / 27%)	24.8 (−1.2 / 5%)	39.3 (−14.3 / 27%)	38 (−126 / 77%)	0.08	0.33 (n=67)	0.03 (n=67)	0.00	0.79	0.65	0.68	0.77
GPT 5.5 - No Context GPT-5.5 · No context	12 / 12	56 (−3 / 5%)	981 (+339 / 53%)	27.8 (+1.9 / 7%)	81.8 (+28.3 / 53%)	37 (−127 / 77%)	0.11	0.34 (n=139)	0.02 (n=139)	0.01	0.79	0.64	0.66	0.82
Sonnet 4.6 - No Context Claude Sonnet 4.6 · No context	12 / 12	54 (−5 / 8%)	390 (−252 / 39%)	23.8 (−2.2 / 8%)	32.5 (−21.0 / 39%)	58 (−106 / 65%)	0.08	0.31 (n=61)	0.00 (n=61)	0.00	0.76	0.61	0.66	0.73
Gemini 2.5 Gemini 2.5 Pro	12 / 12	57 (−2 / 3%)	436 (−206 / 32%)	23.4 (−2.5 / 10%)	36.3 (−17.2 / 32%)	35 (−129 / 79%)	0.09	0.32 (n=76)	0.04 (n=76)	0.00	0.79	0.66	0.69	0.75
Sonnet 4.6 Claude Sonnet 4.6	12 / 12	53 (−6 / 10%)	389 (−253 / 39%)	23.4 (−2.5 / 10%)	32.4 (−21.1 / 39%)	59 (−105 / 64%)	0.09	0.29 (n=76)	0.03 (n=76)	0.00	0.77	0.62	0.67	0.73
GPT 5.5 GPT-5.5	12 / 12	57 (−2 / 3%)	891 (+249 / 39%)	27.6 (+1.7 / 6%)	74.3 (+20.8 / 39%)	33 (−131 / 80%)	0.11	0.34 (n=124)	0.04 (n=124)	0.01	0.79	0.63	0.66	0.81
∑ Average across 8 runs	12.0 / 12	55.4	536.3	24.3	44.7	46	0.09	0.32	0.02	0.00	0.78	0.64	0.68	0.76

Qualitative Coding

Pilot Results:

- Coding quality is variable and depends on run specification
  - Model, codebook structure, context, prompt design, etc.
  - MaxQDA did not offer any customization
- Context improves performance

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Qualitative Coding

Pilot Results:

- Overall accuracy is improving, but variable
  - Accuracy stats only give a partial view
  - Conceptual vs word-based codes
  - False positives vs false negatives
  - Impact on findings and segments
- Having an audit trail is important (chat bots don't provide)
- Configuration matters, but no "right" configuration
- Overall, more testing and refinement is needed
  - LLM advancement also a factor

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Qualitative Coding

Next Steps:

- Replicate approach on other studies
  - Different sector, length, language, respondent types
- Identify configurations with stable performance across studies
- Adapt research processes for AI workflow
- Publish findings

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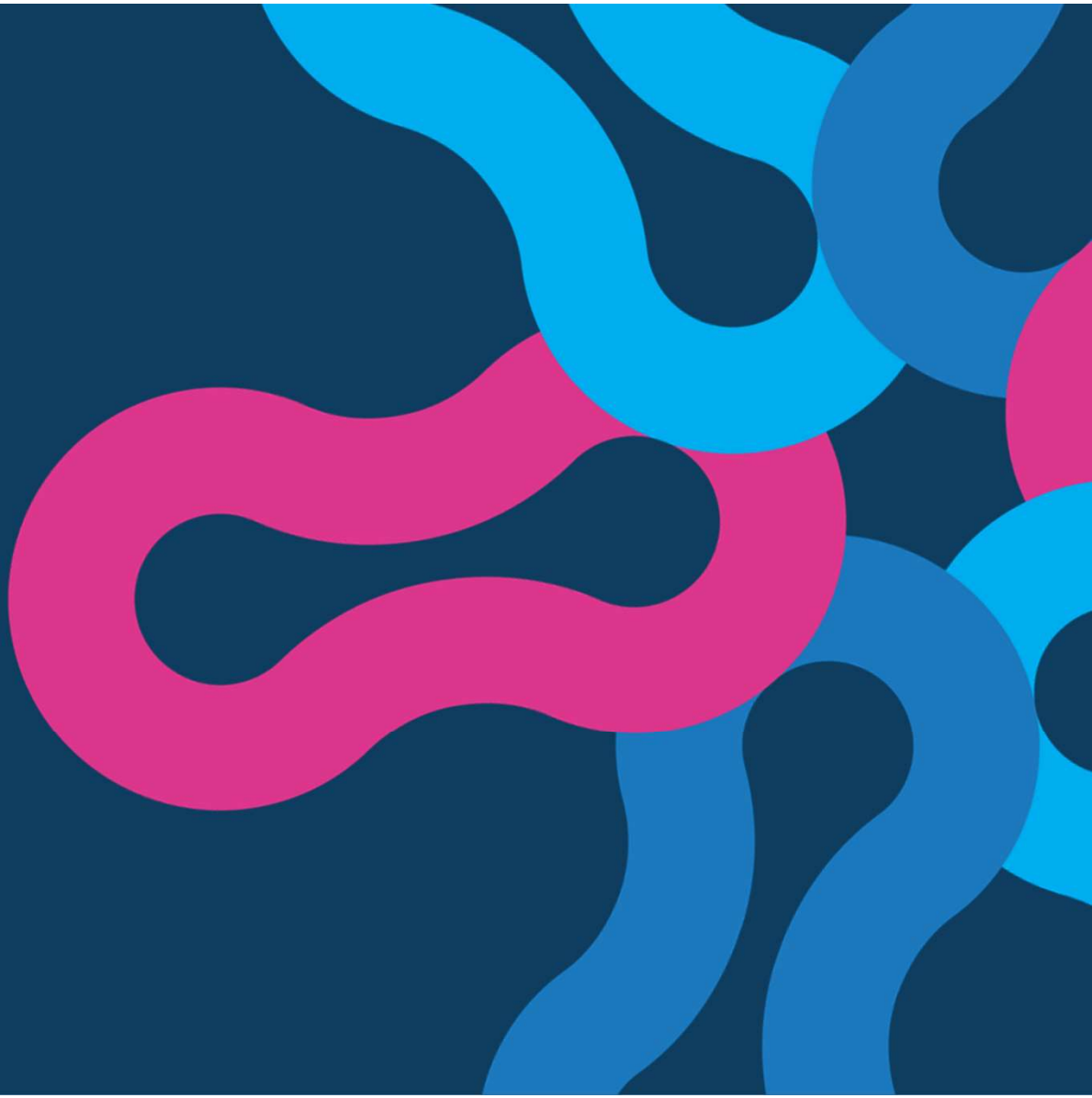
Closing Remarks



MCC's Operational Context

Varied understanding, appreciation and use

- Within MCC, half of staff are using AI, half are not.

Common Use	Uncommon
• Research • Summarization	• Data Analysis • Coding • Visualization • Technical Work

Benefits and Challenges

The Promise

- Analyzing large documents or datasets
- Knowledge management / finding information
- Reducing administrative burden
- Improving speed or quality of writing

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Benefits and Challenges

The Promise	The Peril
• Analyzing large documents or datasets • Knowledge management / finding information • Reducing administrative burden • Improving speed or quality of writing	• Cognitive effects • Improper use • Accuracy • Data privacy • Environmental impact

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MCC Questions on AI pilot proposals

Data Privacy

- How is data held?
- What are the encryption standards?
- Will indirect identifiers be included in AI-enhanced de-dentification?
- Who will have access to the AI workspace?

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MCC Questions on AI pilot proposals

Data Privacy

Quality

- What principles will be used for crafting effective prompts?
- How will the LLM be customized?
- When and how are humans reviewing AI outputs?
- Is AI used in developing the codebook, or just in applying it to transcripts?
- How will "output quality" be determined?

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MCC Questions on AI pilot proposals

Data Privacy

Quality

Reproducibility and Transparency

- How will prompts and replies be documented and saved?
- How will temperature controls be used to ensure more consistent outputs?

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MCC Questions on AI pilot proposals

Data Privacy
Quality
Reproducibility and Transparency
Cost

- How will the cost compare to not using any AI?

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MCC Questions on AI pilot proposals

Data Privacy
Quality
Reproducibility and Transparency
Cost

Learning

- What can we learn from this pilot that could be applied to future evaluations?

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New technology, same principles

- Cost-effective use of technology
- Transparent and ethical
- Credibility is key
- Reducing research bias

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global
evaluation
initiative

DISCUSSION / Q&A


global
evaluation
initiative
Thank you!
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Qualitative Coding

Factors to Consider:

- Structured contextual information
- Codebook development
- Prompt optimization/customization
- Desired coding results (segments/coding)
- What are you optimizing for?

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