BLAISE 5 IS WORTH THE WAIT

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Two Ways to consider the Title

1. Blaise 5 Is Worth the Wait?
2. Blaise 5 Is Worth the Wait!

Is the title a question or is it a positive statement?

Why is this an issue?

In order to answer the question it is necessary to review the challenges and how Blaise 5 answers them.

First are the challenges called the '9 Multis'.
The Troubles we have!

Have you heard about the '9 Multis'?

OMGoodness!
Yes! How will we cope?
The Challenges – 1 of 9 'Multis'

Multicultural Surveys

But wait!
It gets worse!

There's differences in

Understanding

Values

Meaning

Scale

spacing
The Challenges – 2 of 9 'Multis'
Multi-device Surveys

But wait! It gets worse:

Then there's all those

Desktops
Laptops
Smartphones
Tablets
The Challenges – 3 of 9 'Multis'

Multilingual Surveys

But wait!

It gets worse!

And we have to deal with

Translations

Fills

System texts

Alphabetic & Asian scripts;

Left-to-right & Right-to-left languages

Language switching
The Challenges – 4 of 9 'Multis' Multimode Surveys

Don't get me started on modes!

Interviewing
Self-administered
CATI
CAPI
Browser
Survey Management

But wait! It gets worse!
The Challenges – 5 of 9 'Multis' Multinational Surveys

And countries have their own

Currency
Flags
Institutions
Social programs
Links
Data formats

But wait! It gets worse!
The Challenges – 6 of 9 'Multis'

Multi-operable Surveys

What is the month and day of your birth?

Month
Day

Select a value

Number between 1 and 31

Birth month and day

Month
Day

It gets worse!
The Challenges – 7 of 9 'Multis' Multi-platform Surveys

And all those situations!

Connected
Disconnected
Blocking
Separation of rules from layout
Operating system

But wait! It gets worse!
The Challenges – 8 of 9 'Multis'
Multi-structural Surveys

<table>
<thead>
<tr>
<th>CATI/CAPI</th>
</tr>
</thead>
</table>

Please classify your principal employer.
- Self employed or a business owner
- A private-sector employee
- A government employee
- Another type of employee

Were you...
- In a non-incorporated business, profession, or farm

Was that...
- In a for-profit company or organization
- In a non-profit organization (including tax-exempt and charitable organizations)

Was that...
- In a local government (e.g., city, county, school district)
- In a state government (including state colleges/universities)
- In the U.S. military service, active duty or Commissioned Corps (e.g., USPHS, NOAA)
- In the U.S. government (e.g., civilian employee)

What other kind of employment do you have?

WEB/Paper

Please classify your principal employer.

SELF EMPLOYED or a BUSINESS OWNER
- In a non-incorporated business, professional firm, or farm
- In an incorporated business, professional practice, or farm

PRIVATE SECTOR employee
- In a for-profit company or organization
- In a non-profit organization (including tax-exempt and charitable organizations)

GOVERNMENT employee
- In a local government (e.g., city, county, school district)
- In a state government (including state colleges/universities)
- In the U.S. military service, active duty or Commissioned Corps (e.g., USPHS, NOAA)
- In the U.S. government (e.g., civilian employee)

OTHER
- Other type of employee, specify

And we obsess about:
- Visual vs aural presentation
- Answering
- Memory demands
- Linear vs non-linear cognitive processing

But wait!
It gets worse:
The Challenges – 9 of 9 'Multis' Multi-version Surveys

But wait!
It gets worse!

And these are similar but different!

Commodities
Industries
Processes
Variations on a theme
500 versions of an industry survey!? 
The Challenges (continued):
Governmental and Scientific Surveys

But wait!
It gets worse:

And the surveys we do!

Long
Complex
Economic
Social
Behavioral
Cross-sectional
Longitudinal
Multi-instrument
The Challenges (continued): Additional Complications

Disability / accessibility

Edits across modes!

Legacy surveys and data series!

Paper questionnaires

Device sensors!

But wait! It gets worse!
The Challenges (continued): Constraints

- Not enough time!
- Screens are too small!
- Not enough money!
- Last minute changes!
- Unclear specifications!
- Computers are too slow!
- You want what?! When?!

But wait! It gets worse!
The Challenges (continued): Methods and Operations

- Audit trails!
- Scientific integrity!
- Survey Management!
- Change strategies!
- Increase incentives!
- Console the interviewers!
- Change the instrument?!

But wait! There is Blaise 5!
There is Blaise 5!

But, you need a plan.

Stop complaining!

Figure it out!
From the Challenges: The Points

• Modern-day surveys are very hard
• No single person has all the answers
• You need teamwork
• You need a strategy
• You need Blaise 5
Your Choice

• A tough experience, or a super-great experience

<table>
<thead>
<tr>
<th>Sub-Optimal Use of Blaise 5</th>
<th>Optimal Use of Blaise 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Rodeo Scene]</td>
<td>![Racing Scene]</td>
</tr>
</tbody>
</table>

Blaise 5 technical details can be overwhelming

You build on the brilliance in Blaise 5
The Goal

• A question writer specifies once:
  • Questions
  • Blocks
  • Groups

• The result is an instrument that is multi-everything
  • Desktop – laptop
  • Browser – app
  • Tablet – smart phone – vertical or horizontal orientation

• The researcher should focus on questions
E.g., Colectica

and standard platform settings.

Standard device-specific templates,

and standard multimode keywords and languages,

Magic
The Brilliance in Blaise

- Blaise Language
  - Always strong
  - New and improved
- Separation of 'modes' from
  - Language
  - Layout
  - Settings
  - Style
  - Run modes
  - Special answers

- Build on data structures and families of templates
- Mix-and-match

Example: IBUC 1 – in 1992 – in Voorburg
- Generating 45 versions of a survey (NASS)
- Specification replaced programming
- Required up-front work
- Based on data structures
- Much better product
- Much less work
Examples: Data Structure

What is the month and day of your birth?

Month
Select a value
Day

When did you buy your car?

Please enter month and year.

Month
Select a value
Year

These are the same data structure.

What is the highest level of education you have attained?

Choose one answer.
- Elementary school
- Some high school
- Graduated high school
- Some college
- Graduated college
- Some graduate school
- Masters or higher degree

This is another data structure.
Example: Family of Templates

Data Structure

What is the month and day of your birth?

<table>
<thead>
<tr>
<th>Month</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Template Abreast for 'Split' Resource Set

Template Abreast for 'Medium' Resource Set

Tablet

What is the month and day of your birth?

<table>
<thead>
<tr>
<th>Month</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Pop-up keyboard

Template Abreast for 'Small' Resource Set

What is the month and day of your birth?

<table>
<thead>
<tr>
<th>Month</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Pop-up keyboard
Setting up: Strategic Planning

1. Form an interdisciplinary survey-practice team
   a) Methods
   b) Operations
   c) Systems
   d) Specification / questionnaire designers
   e) And others

2. Come up with standards and design principles
   a) Build on data structures

3. Encode your standards in Blaise 5 modules
   a) Source code
   b) Settings, layout, resource database, styles, etc.
Explaining the Magic
There is really a lot of pre-work

Methodological work

- The Institute determines
  - What kinds of questions it has to handle
  - How it will handle mode differences
  - How it wants its questionnaires to appear
  - How different kinds of devices should run
  - What the different users will require
- The Institute will
  - Establish its interview/user text conventions
  - Investigate all of these issues thoroughly
- I doubt that many institutes have done this rigorously

Blaise 5 work

- The Institute predefines (in Blaise terms)
  - Modes of collection
    - Layout Set Groups
  - Layout Sets
  - Resource Sets
  - Settings
  - Styles
  - Run modes
  - Source code model with keywords
- The Institute predesigns a good Resource Database
- The Institute pre-tests
Examples: Mode Differences

Decide this – up-front

Run parameters

Mode Differences for Running

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Letter</th>
<th>DK/RF &amp; Special Answers Display</th>
<th>When Rules</th>
<th>Dynamic / Static Execution</th>
<th>Run Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interview</td>
<td>A</td>
<td>Yes</td>
<td>Datum change</td>
<td>Dynamic</td>
<td>Thick client</td>
</tr>
<tr>
<td>Self</td>
<td>B</td>
<td>No</td>
<td>Page change</td>
<td>Dynamic</td>
<td>Client-server</td>
</tr>
<tr>
<td>App</td>
<td>C</td>
<td>No</td>
<td>Datum change</td>
<td>Dynamic</td>
<td>Thick client</td>
</tr>
<tr>
<td>Data</td>
<td>D</td>
<td>Yes</td>
<td>On demand(^1)</td>
<td>Static</td>
<td>Thick client</td>
</tr>
</tbody>
</table>

Mode and Device / Size Display Differences

CATI/CAPI split-screen presentation

<table>
<thead>
<tr>
<th>Tablet</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the month and day of your birth?</td>
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</tr>
<tr>
<td>Month</td>
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</tr>
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</table>

Computer browser screen

<table>
<thead>
<tr>
<th>Physical keyboard</th>
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Web Text Display & DK/RF Standards

- Use a full-screen display (Figure 1 above).
- The base font is Arial.
- Question text is bold.
- Instructions text is unbolded italics.
- Choice text (for enumerated fields) is unbolded and not in italics.
- DK and RF are displayed when the respondent first enters the screen.
- If the respondent leaves a field empty and tries to go to the next screen, the question is displayed as a condition to continue, and the question is placed on the next screen.
- When entering data, use of multi-item displays is encouraged to speed up the survey.
- Vertical scrolling is permitted but not liked.
- Edits involving 2 or more fields should be used only if all involved fields are on the same screen.

These things (and more) can differ between modes

Italics

Bolding

Case

Instructions

Treatment of DK & RF

Items on page

Edits

Question statement

Question structure

Layout
Two (more) Ways Blaise 5 Helps

1. A great default Resource Database
   • In process, much work yet

2. B5 Champion Datamodels
   • 8.5 of 10 these are programmed.
   • Need to mature the resource database

These are institute resources
B5Champion

1. B5Champion Instruments
   • B5Basic
   • B5Modest
   • B5Complex
   • B5Scales
   • B5PanEuropean *
   • B5CodeFrame
   • NCSPerson
   • Census
   • Trade
   • Annual Survey of Industry *

2. Purpose
   • Demonstrate Blaise 5
   • Layout design
   • Set institute standards
   • Test
   • Different question types
   • Stress Blaise 5

3. For and Where
   • Blaise 5 developers and users
   • Blaise 5 distribution

* In process

See the poster session
Hold many example data structures
So what is the answer?

Blaise 5 is Worth the Wait!

If you work smart.