



Challenges while upgrading from Blaise 4 to 5

From a managerial perspective

Joost Huurman, program manager Phoenix+

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Scope Phoenix+

Program at Statistics Netherlands:

- Total renewal of data collection processes and systems enabling modern data-collection
- Transition of all (± 120) surveys: social and business surveys
- Including necessary technical modifications for data processing to ensure continuity of statistical output
- Corresponding organizational change

Phoenix+, some facts

Started by the end of 2014

Phoenix-renewal processes and systems

- Step by step development, e.g.
 - CAWI (1st release) realized by 1-11-2015
 - PAPI realized by 1-3-2016
 - Data access (1st release) realized by 1-9-2017
 - ...
- By now appr. 2/3 is realized
- Development CAPI/ CATI will start next year
- Finish mid 2020

Phoenix+, some facts

Phoenix-transition

- Currently 34 Surveys in Phoenix+
- Finish mid 2021

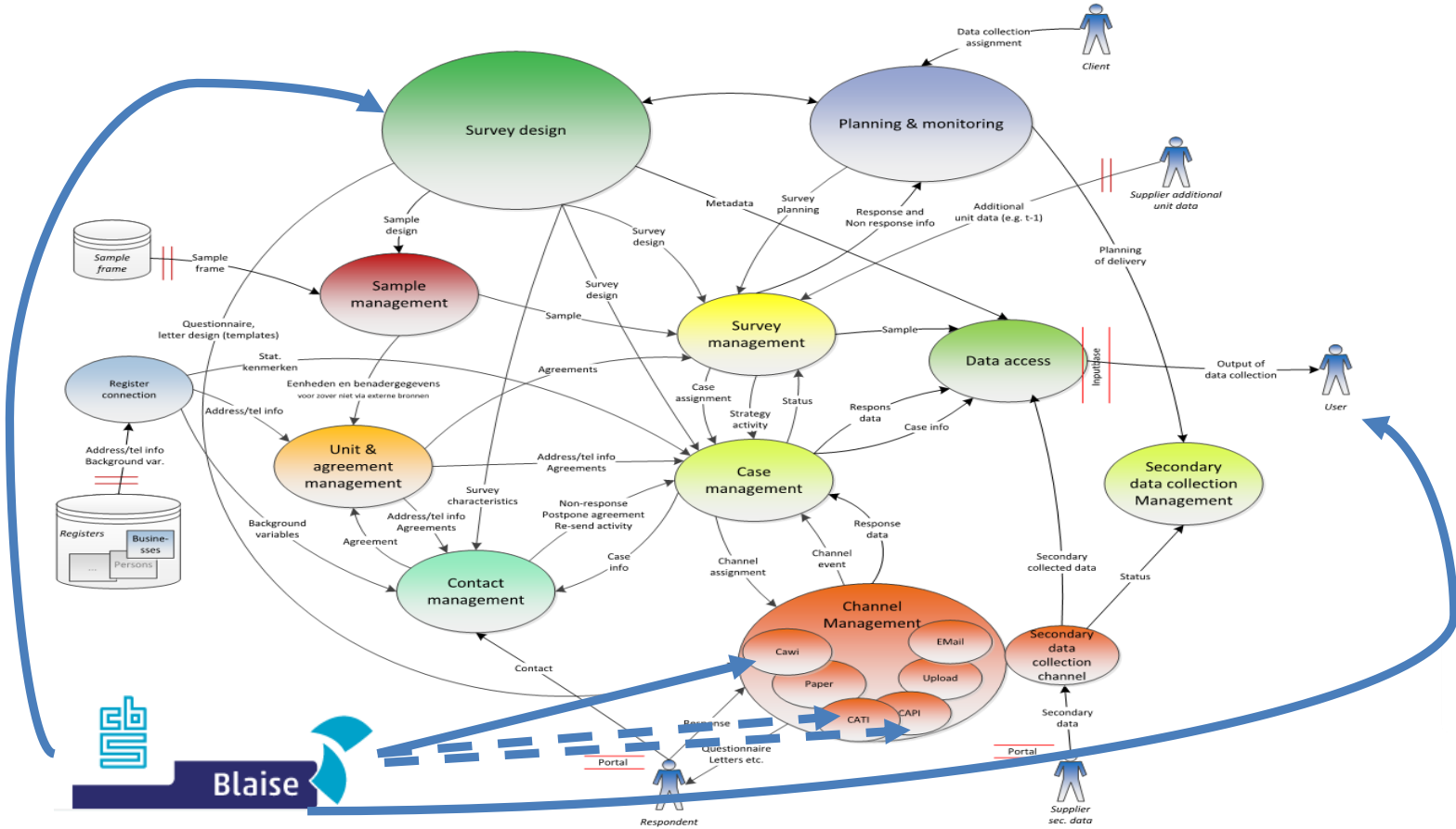
Phoenix-reorganization

- Pilot reorganization starting 1-1-2019

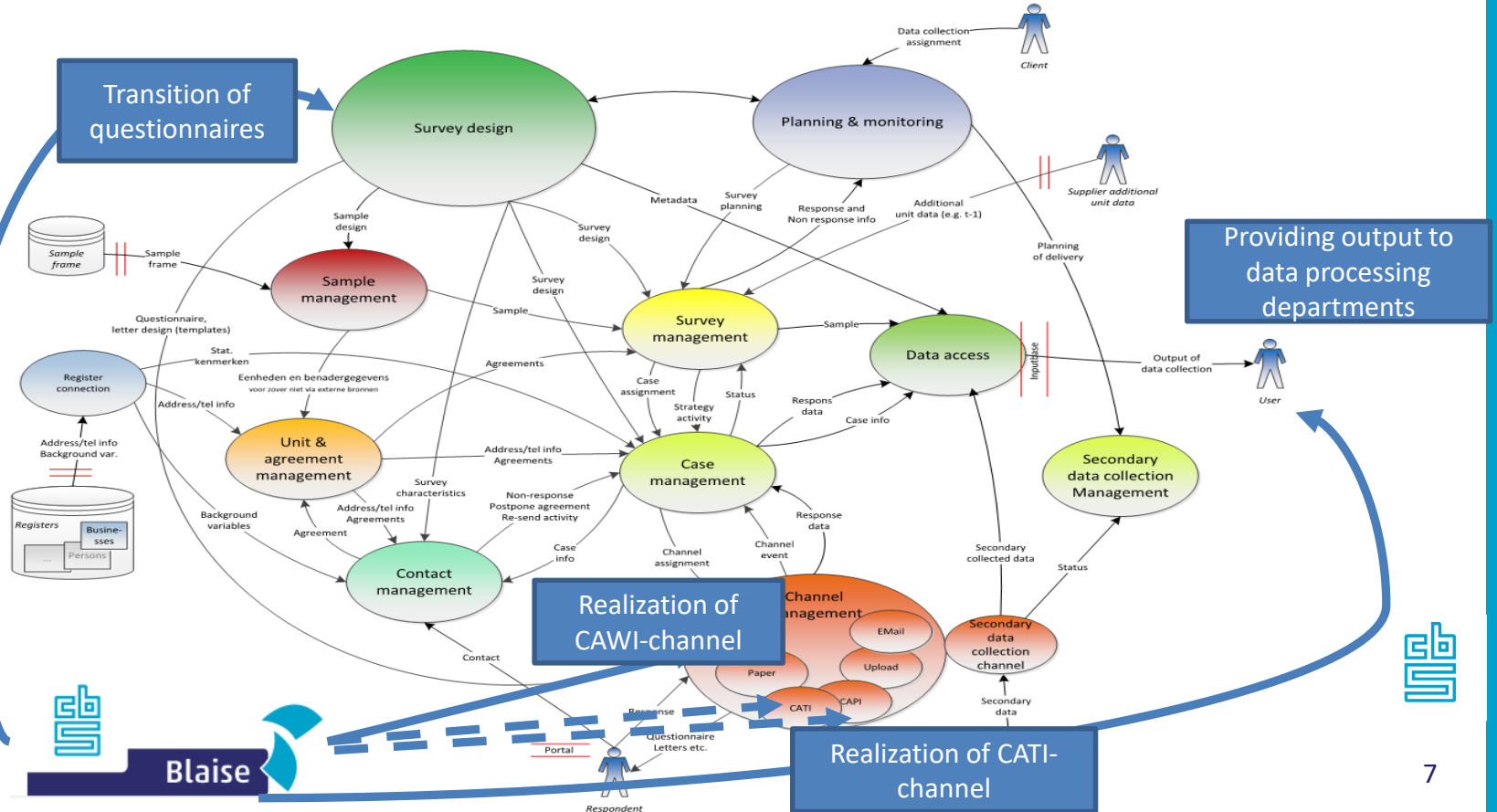
Total budget is €36 million / 300 fte.



Blaise in Phoenix+



Discussion themes



Theme 1: Realization of CAWI-channel

1. Upgrades of Blaise versions

Almost 2.000 hours spent in upgrading CAWI 5.0.5 -> 5.2.5

-> (Improved) Backwards compatibility

-> Quality of releases improved

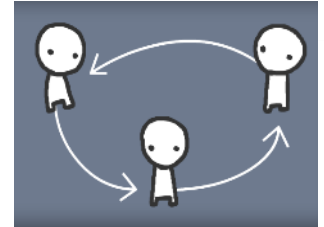
-> Adjustments to CAWI-channel to enable easier upgrades

Upgrade 5.3 -> 5.4 significantly improved

2. Interaction between Blaise, CAWI – channel, infra and questionnaire development

In case of issues it is difficult to pinpoint the root cause

-> Multi-disciplinary task-force in which issues are handled



Theme 1: Realization of CAWI-channel

3. Security

Data privacy and security are of vital importance to statistical organizations. Blaise does not provide login functionality.

-> Custom login functionality had been developed

-> Introduction of identity accesmanagement

-> In- and external security tests

Flexibility and security improved



Theme 1: Realization of CAWI-channel

Implementing a Blaise 5 Mixed-Mode Solution

David Kinnear, Office for National Statistics, UK

Each year, the Office had to implement a solution to deliver a pilot mixed-mode Opinions survey using web and telephone. The survey was previously conducted using Blaise 4.8. The corporate systems that are used for data collection and processing were not designed for Blaise 4.8. We decided that Blaise 4.8 was not suitable for the survey and we decided to implement a solution using Blaise 5.3 CAWI.

Did your organization also face these challenges (or related challenges)?
How did your organization handle them?

n.b. For more technical details about the CAWI-channel we refer to “Experiences with Blaise 5.3 CAWI”, by Rogier Hellenbrand

Transitioning an Established Longitudinal Study to Blaise 5 and to a Mixed Mode Design – A Case Study

Rhonda Ash, Karl Dinkelmann, Shane Empie, Rebecca Gatward, Andrew Hupp, Jason Ostergren, James Rodgers,

Marsha Skoman, Rhymney Weidner, and Laura Yoder, University of Michigan

HRS will be used as a case study to describe the processes involved in transitioning an established and complex survey to Blaise 5. We will describe how we adapted the tools and systems involved in the major phases of the survey process to Blaise 5, for example, data collection, sample management, data processing and delivery. We will also focus on specific components or conversion of specific questions within the interview.



Theme 2: Transition of surveys

1. Development of Blaise 5 “Statistics Netherlands lay-out”

A large variety of devices and browsers is used by respondents; Blaise 5 offers rich opportunities in this area. Definition of a “Statistics Netherlands lay-out” was needed, specifying how to handle lay out in a uniform way for all questionnaires.

- > 1 Person in charge
- > Dedicated lay out for smartphones
- > Change management procedure



Theme 2: Transition of surveys

2. Upgrading questionnaires from Blaise 4 to Blaise 5

Time consuming process: Small questionnaires take approximately 50 hours, mid sized 180 hours

- > Development of reusable Blaise 5 “Statistics Netherlands lay-out
- > Questionnaire design tool



3. How to handle upgrades of Blaise versions for questionnaires already in Blaise 5?

Impossible to check all Blaise 5 surveys after every Blaise upgrade

- > A “Test-questionnaire” has been developed that incorporates all question types that are part of the “Statistics Netherlands lay out”



- > Backwards compatibility tested by Blaise using this “Test-questionnaire”

Theme 2: Transition of surveys

4. Performance issues for some questionnaires in IE

Upperbound of 4 sec. for complex questions (especially tables) is exceeded in IE for Blaise 5.3 and higher.

- > For the moment Blaise 5.2.5. will be used
- > Performance will continue to be improved
- > IE will phase out



Transition

Implementation of Blaise 5 Web Questions into an Existing Business Survey Management System

Leif Bochis Madsen, Statistics Denmark

Developing Organization Level Screen Layout and Design Guidelines for Blaise 5

Karl Dinkelmann, Shane Empie, Rebecca Gatward, Lisa Holland, and Andrew Hupp, University of Michigan

Survey Research Center (at the University of Michigan) last updated their CAI screen design guidelines in 2008. As the Center began to program new survey questionnaires using Blaise 5 and transition established surveys, it became apparent that this was a challenge. The Center developed a set of design guidelines and accompanying library of screen templates.

Migrating from Blaise 4 to Blaise 5 - The AHS Experience

Roberto Picha and Richard Squires, U.S. Census Bureau

Did your organization also face these challenges (or related challenges)?
How did your organization handle them?

n.b. For more details about the Blaise 5 questionnaires we refer to “Features used in CAWI questionnaires” by Bryan Bungardt

Web Screen Presentation Using Blaise 5

Michelle Amsbary, Rick Dulaney, Justin Kamens, Westat and Joelle Michaels, U.S. Energy Information Administration

Using Blaise 5 to Solve Multimode and Multi-Device Challenges

Kathleen O'Reagan and Nikki Brown, Westat

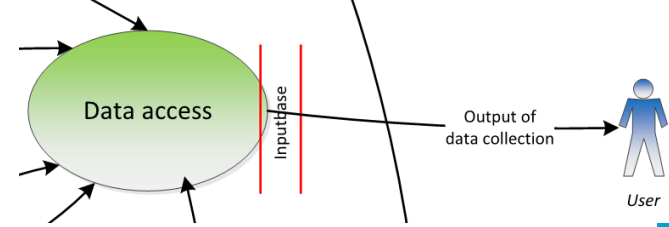
A concurrent-mode mail and web survey was implemented in Blaise 5. The design included mail out of a paper survey to all respondents who were given the alternative to use the web if they so preferred. For this study it was important to optimize the online layout to support multi-device use. Blaise 5 enabled respondents to use iOS, Android and Windows devices with varying screen sizes, browsers and other specific controls. The challenge of designing a web interface for respondents who may also be referring to accompanying hard copy when completing a survey had to be considered in the layout design for Blaise 5. Many of the questions had been designed for larger

Mobile Usability on Household Survey on Blaise 5

Petri Godenhjelm, Pyyri Keinonen, and Anna Niemela, Statistics Finland



Theme 3: Providing output to data processing departments

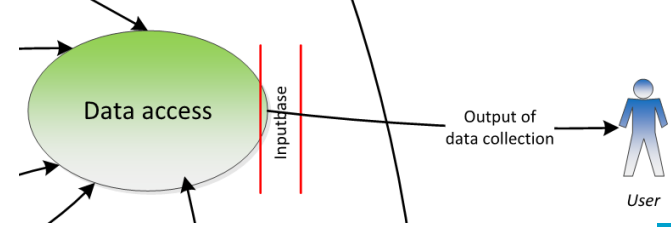


1. A generic interface between data-collection and the data processing departments has been developed.

In the past several customized interfaces were used, all having their own specific characteristics. Leading to high costs, and low maintainability.

-> Json & OData protocol

Theme 3: Providing output to data processing departments



2. Part of the data processing departments use Blaise Manipula

Some data processing departments need Blaise data, including metadata

- > Data are collected using Blaise 5 and delivered using the generic interface
- > After the generic interface they are converted back to Blaise
- > Blaise metadata is delivered using a by-pass
- > For Blaise 4 a temporary solution has been provided

Theme 3: Providing output to statistical departments

Did your organization also face these challenges (or related challenges)?
How did your organization handle them?

Theme 4: Realisation of CATI channel

1. Realisation of CATI channel

Currently a preliminary investigation

- > Blaise will be used where possible, Blaise CATI management will be applied
- > Among others a list of requirements is composed and calibrated with the Blaise development roadmap



Theme 4: Realisation of CATI channel

Experiences with Blaise 5 CATI and Multimode at Statistics Norway

Jan Haslund and Trond Båshus, Statistics Norway

This paper describes our experiences with Blaise 5 and multi-mode surveys and specifically the CATI-functionality in Blaise 5.

Which challenges did your organization face in using Blaise 5 CATI-management?

How did your organization handle them?

