Challenges while upgrading from Blaise 4 to 5

From a managerial perspective

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23 October 2018
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.
Discussion themes

Transition of questionnaires

Providing output to data processing departments

Realization of CAWI-channel

Realization of CATI-channel
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 access management
   
   -> In- and external security tests

   Flexibility and security improved
Theme 1: Realization of CAWI-channel

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 encorporates 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
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
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?