

IBUC 2023 Presentation

Topic

Our Blaise 5 Journey: A case study of a CAWI/CATI survey and the end-to-end processes and systems used

Abstract

We are on a journey to migrate to Blaise 5 for all our survey work, and now that we have completed a few Cawi and Cawi/Cati surveys on this new platform, we would like to share our experiences: what we have developed, what we have learned, and the challenges and opportunities along the way, as well as what is yet to come. We would like to break this down into the following components:

Background and Overview

- Why Blaise 5? What's important to NatCen
- Overview of our business and environments

Redesign of sample management / Survey Control System (SCS)

- Tight Integration with Blaise 5 using API's
- Automating communications (survey invitations, reminders, thank you's) and sending incentives (gift vouchers)
- Freephone (Help Line) functionality
- Merging contact updates from multiple sources

Multi-Mode Cawi/Cati

- Single instrument and DB for both modes
- Cati Launcher for handing multiple numbers and call results
- Removing web completed cases and Freephone opt-outs from Cati Daybatch
- Monitoring Fieldwork progress
 - o Cati Dashboard

- Custom reports
- Data exports using B5 wizard

Survey Development and Testing

- Staging environment (mirror of Production), to program the Qre and setting up SCS in tandem
- Testing both systems before launch to Production
- Deploying to Production

Lessons learned

- Managing Blaise version upgrades
- Performance and inter-dependencies of software

What lies ahead?

Multi-Mode Capi with Cawi and/or Cati

- Challenges
 - Capi Interviews done offline while Cati/Cawi surveys done online and keeping them in synch. And reconcile differences afterwards
 - Coordinating assignment of cases to Capi and Cati interviewers
 - Informing Capi Interviewers about surveys done in Cati/Cawi