

The Challenge in Balancing Data Collection Innovations, Remaining Practical, and Being Cost-Effective

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MATHEMATICA
Policy Research

Overview

- **Background**
- **Benefits of Built-In Capabilities of Blaise**
- **Areas We Are Exploring Using Blaise**
- **Conclusions**

Question?

Background

- **Cutting Budgets, Expecting Quality**
 - Global Recession
 - Rapidly evolving technologies
- **Smarter, Faster, Cheaper**
 - Not alone - IBM
- **Remaining Competitive and Capable**
 - Unbiased, reliable & timely data
 - Designing with reusable potential
- **How can Blaise help**

Benefits of Built-In Capabilities of Blaise

■ Actions

- **Predefined actions**
- **Custom**
 - Calling Manipula/Maniplus
 - COM

■ Events

- **Calling other programs by COM**
 - SQL2Blaise

■ Datalink

- **Pros and Cons**
 - Centralize database
 - Success on the web

Benefits of Built-In Capabilities of Blaise II

- **Multi-mode**
 - Writing once
 - Mode difference
- **Many ways to expand**
 - Limited to your own thinking
 - Our own “OnLoad”

Areas We Are Exploring Using Blaise

- **Real-Time Processing Using the Blaise Datalink Component and SQL Databases**
 - Survey data
 - Blaise 5
- **Blaise on Mobile Devices**
 - iPhones, iPads, and Android-enabled devices to tablets and e-book readers
 - Bring Your own Device (BYOD)
 - Write once for all modes
- **ISMS – Integrated Survey Management System**

ISMS – Integrated Survey Management System

■ What the ISMS does

- Fully integrates Blaise CATI with the SMS
- Removes all or almost all management data from the Blaise CATI questionnaire

■ Benefits

- Reduce duplication of management data across multiple systems
- Eliminate overnight syncing and reconciliation processes
- Provide real-time access to updated sample and contact information in both Blaise and the SMS
- Simplify sample release process

How ISMS will work

- **Access to cases**

- Interviewers access cases by using Blaise
- The Blaise Call Scheduler delivers cases

- **Entry, exit, and contact update screens are in the ISMS**

- First action in Blaise is to turn control over to the ISMS
- Once the respondent is on the phone control is turned over to Blaise to complete the questionnaire
- Contact information screens allow for live updating and viewing of information
- Blaise returns control to the ISMS at completion or break-off from questionnaire
- ISMS decides status codes, creates history records, and passes the necessary status and appointment information to Blaise for exiting

How ISMS will work II

- **Tied into Survey Management System (SMS)**

- A centralized standard system used on projects to manage, track, and report on all phases of data collection
 - Locating
 - Receipting and document processing
 - Case management – search, view, update
 - Sample release – CATI, CAPI, and CAWI
 - Administrative functions
 - Reporting

ISMS Screens

☐ MainWindow

Respondent10025444Michael211 LTest2111:36 PM

Interviewer Group:
Days Since Left Msg:
Sample Member:
Telephone Number:
Call Center Dial Prefix:
Current Address:

TEST DAYS
Michael211 LTest211
4080000211
10,1
211 Main St

Princeton, NJ 08542
0000 - Untouched

Final Status:

☐ 1. AUTO DIAL
☐ 2. MANUAL DIAL
☐ 3. QUICK EXIT
☐ 4. RESPONDENT CALLING IN

Contact Start Date/Time	Contact End Date/Time	Logical Status	Current Status	Interviewer Time	Interviewer Notes	Appointment Date	Phone# Attempted
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ISMS Screens (cont'd)

MainWindow

Respondent10025444Michael211 LTest2111:37 PM

You should have received a letter from... Each person's participation is voluntary, but very important and all answers will be held in strict confidence.

☐ 1. BEGIN INTERVIEW

☒ 2. DID NOT RECEIVE OR DOES NOT RECALL THE LETTER

☐ 3. WANTS MORE INFORMATION

☐ 4. NOT A GOOD TIME

☐ 5. HUNG UP DURING INTRODUCTION

☐ 6. SUPERVISOR REVIEW

☐ 1. BEGIN INTERVIEW

☒ 2. WANTS ANOTHER LETTER

☐ 3. WANTS MORE INFORMATION

☐ 4. NOT A GOOD TIME

☐ 5. HUNG UP DURING INTRODUCTION

May I read the letter to you and then we can begin?

☐ 1. YES, READ THE LETTER FROM HARD COPY

☒ 2. NO, WANTS ANOTHER LETTER FIRST

☐ 3. HUNG UP DURING INTRODUCTION

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Conclusions

- **Striving to be innovative, practical, and cost-effective**
 - Proper Planning with Innovative ideas
 - Can't be resistant change
 - Build flexible & dynamic systems
 - Can be expense
- **Look outside**
 - IBM
 - Technology trends
 - Kodak
 - Not kept up
- **Great expectations for Blaise**
 - Don't be the next Kodak, be IBM

Tablets and Smartphones *(cont'd)*

■ **Functionality**

- Review case load and daily assignments
- Update status information
- Update or enter new address information
- Using Google Maps to get directions from their current location or map multiple assignments
- Enter appointments

■ **Security**

- Used an encrypted mobile configuration file to lock down the iPads' settings
- No PII is stored on device
- Glenn Jones will be presenting “Mobile Device Data Collection and its Security Attack Surfaces” Thursday afternoon at the session on Going Mobile: Ensuring Security of New Data Collection Platforms

Questions?

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