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SSHOC
social sciences & humanities open cloud

Developing a software suite for managing large scale cross-national web surveys within the framework of the European Open Science Cloud

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BigSurv20- November 20th 2020 - online



The need for a cross-national SMS

- The ESS experimented with the worlds' first input harmonised probability based cross-national web panel in three countries by recruiting panel members who had taken part in the face-to-face survey
- Key challenge:
 - absence of a sample management software suited for use in a multi-country environment and which could also meet data protection requirements



Major challenges

- Harmonised management of the sample in the three different countries
- Harmonised management of incentives
- Central management of different survey contacts (postal mails, emails and text messages)
- Harmonisation of the surveys' translation into three different languages
- Access to panellists information at country and central level: restricting access right and preventing subsets of the staff being able to access panellists' personal information proved challenging



Aim

- No “off-the-shelf” commercial software that was flexible enough to manage the complexity of a cross-national sample
- ESS ERIC and Sciences Po will build upon their experience of developing a sample management software suite for their national web panel (ELIPSS) to meet the needs of cross-national projects



Functionalities

- **Storing** and uploading panel member information
 - Add new cases
 - Add new variables
 - Update existing variables
- **Managing** a panel throughout the course of survey life cycle keeping track of the panellists' activity
 - Updates from participants (e.g. contact details, opting out)
 - Updates from survey data (e.g. Whether or not the panel member has started/completed the interview)
 - The software links directly with the survey instrument, allowing for a two ways instant synchronisation
 - Fieldwork monitoring: generating basic dashboards
- **Participant communications**
 - centralised management of translated emails, short text messages to panel members
 - Dispatch of emails



Two communicating Information Systems

- Questionnaire developers
- Messages and translation managers
- Data archive member role

Survey Platform



Web API

- Headquarters manager
- National coordinators
- Respondents

Web Panel Sample
Service



A complete set of roles

The combination of:

- web application roles and accreditations
- survey platform roles and permissions

... is designed to create an information system where:

- data flows are minimized (see [Data flows chart](#))
- roles are defined on a need-to-know basis.



Survey Platform – User roles

- **Questionnaire developer:**
responsible for survey programming
- **Messages and translation manager:**
responsible for drafting communications with panelists and translation operations
- **Archive member:**
responsible for survey data curation and archiving



Web Panel Sample Service – User roles

- **Headquarters:** manager of the survey.
 - HQ creates a list of national coordinators (NC) accounts, and assigns a national sample to each NC.
 - HQ can access anonymised data to monitor the cross-national samples and fieldwork.
 - HQ role can monitor questionnaires and messages translation (drafted in the survey platform).
 - HQ role is the only role empowered to trigger emails and text messages survey invitations and reminders



Headquarters

Entry point for headquarters managers

Panelists

Overview of Panelists

Panels

Overview of all panels
Create new panels

National Coordinators

Create NC accounts
Assign NCs to panels

Surveys

Qualtrics surveys
Distribute surveys to panels

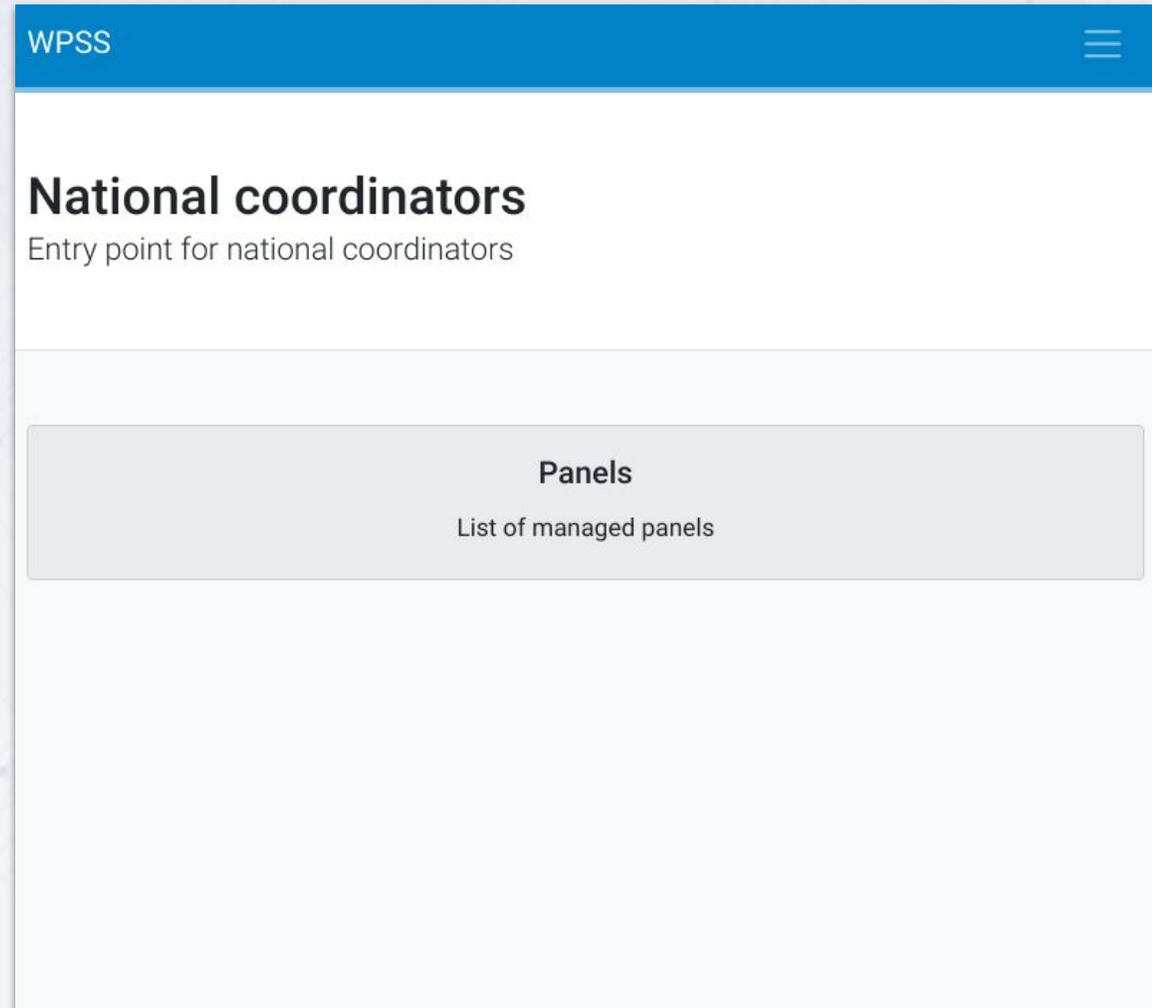
Messages

Qualtrics messages



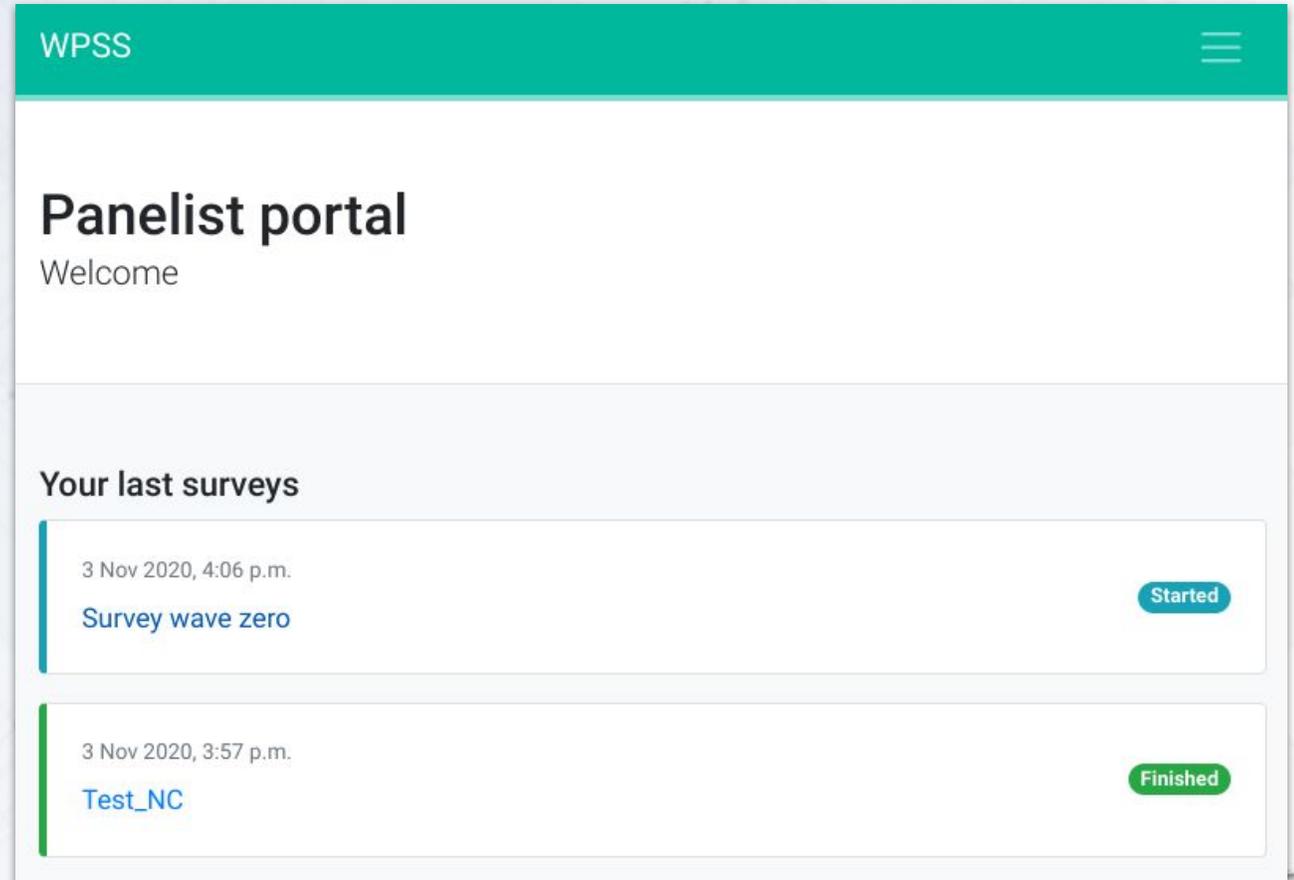
Web Panel Sample Service – User roles

- **National Coordinators** (NC), which are responsible for each national sample



Web Panel Sample Service – User roles

- **Respondents** have access to a personal webpage where they can
 - update contact details,
 - find useful information (like helpline),
 - answer published surveys



The screenshot shows a web interface for the WPSS Panelist portal. At the top, there is a teal header with the text 'WPSS' and a hamburger menu icon. Below the header, the main content area is white and contains the following elements:

- Panelist portal**: The main heading, followed by a 'Welcome' message.
- Your last surveys**: A section title above a list of survey entries.
- Survey 1**: A survey entry with the date and time '3 Nov 2020, 4:06 p.m.', the title 'Survey wave zero', and a teal 'Started' button.
- Survey 2**: A survey entry with the date and time '3 Nov 2020, 3:57 p.m.', the title 'Test_NC', and a green 'Finished' button.

Thanks you for your attention

Do not hesitate to contact us for more information

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CRONOS2 DATA FLOW

