Piloting surveys with DDI

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Abstract

For the past ten years, INSEE has been developing a survey data collection platform using international standards in a metadata-driven approach. This work has led to the development of questionnaire design tools, to specify and generate multi-mode survey questionnaires.
Today, with the Protools project, INSEE is extending the use of active metadata beyond survey instruments in order to further industrialise the implementation of a survey unit. Thus, the ambition is to use metadata to:

* configure complex survey protocols (multi-mode, one or more collection sub-cycles, different collection instruments, etc.)

* be able to trigger collection events (initiate/close collections, send letters or emails, change the collection mode linked to a unit, etc.).

In this type of comprehensive survey protocol, Protools will act as an orchestrator triggering events and driving different data collection tools. It will implement the BPMN standard whose objects will be marked, among others, by DDI objects.
With this in mind, the objective of this work is to identify the DDI elements that are relevant to characterise the main steps and objects of the survey protocol. A discussion will be proposed in order to present those aspects of the survey protocol that are not easily managed by DDI or the choices we have made to fit our needs.

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