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Survey and Forum Platforms

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Abstract

For the general survey and the case study surveys of WP3 several platforms for the design of a survey and collection and analysis of responses were reviewed and evaluated. This document records the results of the review and evaluation process and explains and justifies the choices made. In addition it describes the process of developing and maintaining a forum for the exchange of information about digital preservation in Europe's science communities.

Keyword list

Survey, Survey Platform, Forum Platform

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1 Introduction

The objective of the Community Insight work package (WP3) is to provide information that is needed to perform a gap analysis and refine the roadmap. For that objective we first need to gather information on several aspects related to digital preservation and access. These aspects include the perceptions of the importance of digital preservation, the funding expected to be available for preservation, and the factors influencing those decisions. We use a number of methods to determine the present state of affairs regarding digital preservation—desk research, interviews, case studies, and surveys. In this document we focus on the survey and the survey software we will use.

A survey is a method of gathering information from a sample of individuals. The sample represents the total population being studied. There are different methods for survey data collection—telephone interviews, in-person interviews, mail—but in this document survey means an online questionnaire that is distributed by e-mail or any other means of online distribution, e.g. mailing lists.

The target group of the PARSE.Insight project is the European science community. This encompasses all member states of the European Union and all disciplines. We should consider both elements—country and discipline—for the survey's representative sample. Although there will be a small bias in the distribution channels employed, the sample is not pre-selected by us. The survey is distributed through different channels to a large number of researchers from all disciplines and European Union member states. If we notice a lack of responses from certain disciplines or countries when we are collecting data, we will try to locate new distribution channels that specifically target group(s) of people whose responses are lacking.

For the distribution of the survey, the collection of responses, and the (basic) analysis of data we need software, a survey tool or platform.¹ A survey platform here denotes a web application that enables the design and distribution of the survey as well as the collection and (basic) analysis of the survey data. Several products exist on the market today. A number of available tools have been collected on the project's wiki by members of the project team.² These were reviewed and compared.

1.1 Purpose of the document

¹ Survey platform and survey tool are interchangeable terms in this document.

² <http://parse.digitalpreservation.eu/bin/view/Main/WP3Survey>

The purpose of this document is to record the review and evaluation process of the survey platforms that were tested for the survey of WP3. It explains and justifies the choices made.

1.2 Structure

The document is divided into two sections. The first section deals with the survey platform and the second section with the forum platform. The survey platforms section is divided into two subsections: a subsection that lists the needs and requirements for the survey platform, and a subsection that deals with the review and selection of the survey platform. The latter section is further divided into the following sections: the platforms, methodology, initial scan, and platforms review. The platforms review is structured according to the survey steps as formulated in the first the needs and requirements subsection.

For the forum platform an agreement has been reached with the Alliance for Permanent Access for sharing some of the burdens and responsibilities. The Alliance has agreed to organise and maintain an online forum, but the PARSE.Insight project team has to develop a proposal. The forum platform section describes the process of developing and maintaining this forum.

2 The Survey Platform: Needs and Requirements

2.1 Background

Initially the basic choice for a survey platform was a choice between developing a tool and selecting an existing platform. To develop a tool required a considerable investment of resources. From the list of available tools—collected on the project’s wiki—it became clear that several good and affordable alternatives are available. Therefore we decided to allocate resources to selecting an existing platform.

Basically, the life cycle of the survey has four phases: the design of the survey, the distribution of the survey, the collection of the responses, and the analysis of the results. Earlier we defined a survey platform as a web application that can assist us in all four phases of this life cycle. Yet what exactly is the added value of a platform for the survey?

A survey platform enables us to create professionally looking online questionnaires, distribute them online to the survey sample group, collect responses from the survey sample group and analyse these responses—all within one platform environment. The following sections explain the added value of a survey platform in more detail for each of the four phases of a survey. In addition the section lists the basic needs and requirements for a survey platform.

2.2 Design

A good survey comprises more than a list of good questions. There is little that a survey platform can do to assist in composing questions, except for checking grammar and spelling. Yet, how the questions are presented (form) may be just as important as what is asked (content). And it is in the area of form that a survey platform becomes useful. A well-designed survey may result in a larger response and a high quality research report.

Platforms often work with templates. Each template has a standard design (colours, fonts, etc.). While many of these templates are fine for informal use, a professional survey like ours benefits from a professional design. This can be achieved by customising the existing templates or by designing a template from scratch. Customisation makes it possible for us to give our survey a distinctive look, including our logo, which may help us distinguish our survey from the many others circulating on

mailing lists and the web. Thus, the survey tool of choice should have customisation features.

A beautifully designed template, though, does not guarantee a usable questionnaire. Design is more than nice colours and easily readable font. We have to keep the respondents in mind here and make it as easy as possible for them to fill out our survey. This also means choosing the right type of question for the queries. Open questions, for instance, take much time to answer. Therefore we should keep these kinds of questions to a minimum and aim for questions with a multiple choice character. Yet we do want some flexibility in this.

Sometimes multiple choice questions with more than one answer are necessary, while at other times multiple choice questions with a one-answer-option suffice. If the list of possible answers is long—e.g. the countries list—it may be easier to have respondents select an answer from a drop down list of choices.

Skip logic is another useful feature. Skip logic can be used to adapt the path respondents follow when taking our survey. Suppose we ask people the following question: “Do you think that an international infrastructure for data preservation and access should be built?” If the respondent answers “yes,” it is useful to ask for the respondent’s ideas about such an infrastructure in a follow-up question. However, if the respondent answers “no,” it is not useful to ask the respondent the same follow-up question. Thus, those who answer ‘no,’ skip the follow-up question. The advantage of skip logic is that we don’t bother respondents with questions that are not relevant to them. It makes the exercise of filling out a survey more efficient for the respondent, who may as a result be more inclined to complete the survey. There are, then, a few basic types of questions that we would like to have available (see below).

We decided that the following requirements cover our basic needs for the design phase.

- The survey should be web-based.
- The Survey Platform should have the ability to customise the lay-out, i.e. change colours, fonts, and other elements. It should at least be able to present a generic look, without advertisements. The ability to add the PARSE logo would be an advantage.
- The Survey Platform should have the ability to add comments to the questions. This is useful when the question needs an explanation.
- The Survey Platform should have the ability to add skip logic to the questions.

- The Survey Platform should offer the possibility to select from different types of questions. This should at least include:
 - Multiple choice with only one answer possible
 - Multiple choice with more than one answer possible
 - Text boxes for open questions
 - Rating scales
 - Drop down menus

2.3 Distribution & Collection

A web-based survey tool should be able to generate an “anonymous” URL which can be put on a web page or sent via existing mailing lists to potential respondents (e.g. a mailing list maintained by funding agencies). In addition the survey tool should also be able to handle the distribution itself (e.g. when given a list of email addresses) and be able to link the response status to an email address (e.g. by means of generating a “personalised” URL for each invitee).

We assume here that the e-mail addresses of the people to whom the survey is sent is available. If so, a good survey platform will be able to keep track of responses in several ways. Tracking will give us the ability to (re)view the respondent’s status. Has the respondent started the survey? If yes, has the respondent completed the survey? Or, did the respondent opt out? The status information can be very useful; for instance, it makes it possible to send targeted reminders to those who have not responded—a strategy which may help increase the response. This can of course also be done manually through your e-mail client, but the automated process of a platform makes tracking easier and more efficient.

Although we are not required to make the survey anonymous, it may be useful to do so in certain circumstances. In any case, we have to inform the respondents about how we use the data. This will be dealt with in the accompanying e-mail and the preamble of the survey. As said, we use e-mail addresses to track responses, but the collected data will be made anonymous. We may also use the e-mail addresses to contact people after the survey, but only if they gave permission and only for the purpose of collecting additional information within the scope of the project.

Yet there should also be a possibility to distribute the survey without having to make use of e-mail addresses. Most platforms can do so. But the disadvantage is that we may lose the tracking possibilities. The software tool should be able to accommodate to

the situations described above and therefore be able to collect responses anonymously as well as have the possibility to track responses.

2.4 Analysis

When the responses are collected they are stored in a database. The goal is to analyse the results. For analysis there are basically two possibilities. The analysis is done within the survey platform environment, or the results are exported and analysed in a different tool, e.g. a statistical analysis program like SPSS. Both options should be available. We want certain basic analysis features within the platform so that we can run quick reports when the survey is still open. In addition, we want to keep the possibility open for more complicated analyses when we are composing the survey report. Thus, the platform should also be able to export the data in several different formats.

For the quick reports the platform has to be able to filter results. Filtering allows us to only view data for a certain domain, for instance for one country, or only for one scientific discipline. When data is filtered a subset of the available data is created. The subset displays all data for all survey responses that match the filter's criteria. Filtering options are a basic requirement, but the platform should also be able to export the subsets of data into several formats. CSV is a required export format (for summaries and for individual responses) but preferably exports into HTML and PDF (at least for summary reports) and XML are possible as well.

2.5 Miscellaneous

In addition to the requirements for design, distribution, collection, and analysis there are a few general requirements:

- The data collected via the survey should belong to our project.
- Users should be able to temporarily stop and continue entering data later. The respondent's time span is limited. To prevent people from giving up before completing the survey, this possibility can assist respondents in finishing the survey in more than one session.
- If the platform is offered as a hosted service, the company hosting the survey needs to have a trustworthy security policy.
- If the platform is offered as a hosted service, high storage capacity is required. Preferably, there are no limitations for the number of respondents.

- The learning curve of the survey platform must not be too steep.
- Trustworthy support.
- Affordable.

3 The Survey Platform: Review

3.1 The Platforms

On the PARSE.Insight wiki a number of possible survey platforms were collected. These include commercial products and freeware as well as hosted and downloadable solutions.

The platforms are:

- Survey Monkey³
- Form Desk⁴
- Smart Survey⁵
- Ask People⁶
- Lime Survey⁷
- Survey Gizmo⁸
- Zoomerang⁹

Not all platforms were reviewed on the basis of all requirements. Above all the solution had to be affordable. This meant that the total costs for the platform should not exceed \$250.

³ <http://www.surveymonkey.com>

⁴ <http://www.formdesk.nl>

⁵ <http://www.smart-survey.co.uk>

⁶ <http://www.askpeople.co.uk>

⁷ <http://www.limesurvey.org>

⁸ <http://www.surveygizmo.com>

⁹ <http://www.zoomerang.com>. The list on the wiki also mentions a KB home made solution. This was not included in the review since it needed more development before being truly usable. Current prices may differ from the prices used in this document. As date of reference we used 1 July 2008. Zoomerang has more flexible prices now than it did at the time of this comparison. They changed prices 1 November 2008, see http://www.zoomerang.com/resources/pr/release_20081101.pdf.

3.2 Methodology

The initial scan was carried out by comparing the prices of the products, as available on the websites of the platforms. The affordable products were then reviewed more extensively, based on the needs and requirements of section 2. For the test we used demo versions, documentation provided by the vendor, and the available information on the platform's websites.

3.3 Initial scan

Several platforms proved to be too expensive. Most commercial platforms offered different kinds of licenses, from basic (free or cheap) to professional (more expensive). Yet the cheaper licenses of these platforms did in several cases not meet the project's requirements.

Form Desk is web-based hosted service which has three kinds of accounts: a free test account, a standard account, and a business account. The test account was only valid for three months, too short for the project's purposes. The business account was too expensive (\geq €1.000 per year). The standard account was reasonably priced. Prices ranged from €49 to €249 per year, depending on the number of respondents and storage capacity. The total number of respondents needed for our survey was at the time of review not yet clear, so we did not want to tie ourselves down to a limited amount of respondents. More respondents can be added to Form Desk for an additional fee. The standard account also does not have the possibility of adding skip logic to the questions. It can be added as an extra module for €99 per year. This made Form Desk too expensive for the project.

Smart Survey is a web-based hosted service with three kinds of accounts: Free, Basic (£14.99 per month) and Pro (£29.99 per month).¹⁰ The number of responses per month is however too limited: 50 for the free account and 350 for the Basic account. At first glance the Pro account seems too expensive. Yet there is a 35% discount for non-profit institutions and a 50% discount for yearly subscriptions. Smart Survey meets our definition of affordable and is therefore included in the more extensive review.

¹⁰ Currency exchange rates: 1 Euro = 1.57804 US Dollar , and 1 British Pound = 1.26346 Euro (1 July 2008)

Ask People is a self-hosted web survey tool. Freeware and thus included in the more extensive review.

Lime Survey is also a self-hosted web survey tool. It is also freeware and thus included in the more extensive review.

Survey Gizmo is a web-based hosted service which has four different accounts: Basic (Free), Personal (\$19 per month), Pro (\$49 per month), and Enterprise (\$159 per month). The number of possible responses of the Basic account (250 per month) is too limited. The Enterprise and Pro accounts are too expensive, but the Personal account seemed a viable option and was thus included in the extensive review.

Survey Monkey is a web-based hosted service which has three different accounts: Basic (Free), Monthly Pro (\$19.95 per month) and Yearly Pro (\$200 per year). The Basic account only allows 100 responses per survey, which is too few. Both the monthly and the yearly account are viable. Since we will be using the survey platform for at least a year, only the yearly account is included in the extensive review.

Zoomerang was at \$350 per year too expensive. It was not included in the extensive review.

3.4 Platforms review

3.4.1 Design

	Web-based	Hosted	Customisation lay-out	Add Comments	Skip Logic	Multiple types of questions
Ask People	√	-	√	√	-	√
Lime Survey	√	-	√	√	√	√
Smart Survey	√	√	√	√	√	√
Survey Gizmo (Personal ed.)	√	√	√	√	√	√
Survey Monkey	√	√	√	√	√	√

Hosting

All tools are web-based. Two out of the five tools reviewed are self-hosted. The main obstacle for choosing a hosted service is security. Not only is there a fear of data loss, but there is also a concern for data misuse (including privacy issues). These security issues need to be addressed if we want to gauge whether we can entrust a third party with the survey data (see 3.4.4).

Customisation of lay-out

	Own logo	Change Fonts	Change colours	Generic Look ¹¹
Ask People	√	√	√	√
Lime Survey	√	√	√	√
Smart Survey	√	√	√	√
Survey Gizmo (Personal ed.)	√	√	√	√
Survey Monkey	√	√	√	√

All platforms have editable templates and meet our basic requirements for customisation of the lay-out. The ease with which lay-outs can be edited differs. Some platforms require CSS and HTML knowledge for editing templates. Notwithstanding the knowledge we may have with regard to HTML and CSS, it takes more effort to

¹¹ A generic look here means a general lay out without advertisements.

customise templates through programming than by means of WYSIWYG editing. So, preferably the platform of our choice has WYSIWYG capabilities.

The following survey platforms require (basic) knowledge of HTML CSS for customisation:

- Ask People
- Lime Survey

Other customisation possibilities

	Add comments	Skip Logic	Multiple types of questions
Ask People	√	-	√
Lime Survey	√	√	√
Smart Survey	√	√	√
Survey Gizmo (Personal ed.)	√	√	√
Survey Monkey	√	√	√

Lime Survey and Survey Gizmo have a feature for *adding comments* or instructions to questions explicitly built in; other platforms can add info questions (simple text) which can serve as comments to other questions. Survey Monkey can place such a question next to the question to which the comment refers. Both methods suffice for our purposes.

The need for skip logic has been explained in 2.2. All tools have a skip logic feature, except for Ask People. The personal edition of Survey Gizmo only allows for simple jumps though.

All platforms have multiple types of questions available, and most meet our basic requirements. The exception is Ask People, which does not support rating scales. The following table sums up the types of questions we regard as required (see 2.2).

	Multiple choice one answer	Multiple choice more answers	Essay questions	Rating scales	Drop down menus
Ask People	√	√	√	-	√
Lime Survey	√	√	√	√	√
Smart Survey	√	√	√	√	√

Survey Gizmo (Personal ed.)	√	√	√	√	√
Survey Monkey	√	√	√	√	√

3.4.2 Distribution & Collection

	Anonymous	Tracked	Both simultaneously
Ask People	√	-	-
Lime Survey	√	√	√
Smart Survey	√	√	√
Survey Gizmo (Personal ed.)	√	√	√
Survey Monkey	√	√	√

Ask People is a simple basic survey tool that does not provide the opportunity to track responses. Every response does get a unique ID though. This means that it is possible to analyse individual responses on the basis of those IDs. All the other platforms provide the possibility of anonymous and tracked responses as well as the ability to use both methods simultaneously. Survey Gizmo invites can only be sent through the platform. The personal edition of Survey Gizmo cannot create a URL that can be cut and pasted in an e-mail and sent through your e-mail client (e.g. Outlook).

3.4.3 Analysis

Filter

The following table shows whether the tool has filtering options

	Filter
Ask People	-
Lime Survey	√
Smart Survey	√
Survey Gizmo (Personal ed.)	-
Survey Monkey	√

The only tool that actually does not provide filtering options is Ask People. The other tools do, but Survey Gizmo only provides filtering options for their Pro and Enterprise accounts. As explained earlier, we use the personal edition of Survey Gizmo for this review (see 3.3).

Export

	CSV	Excel	PDF	XML	HTML
Ask People	-	√	-	-	-
Lime Survey	√	√	-	-	-
Smart Survey	√	√	-	-	√
Survey Gizmo (Personal ed.)	√	√	-	-	√
Survey Monkey	√	√	√	√	√

Except for Ask People all platforms meet our basic requirement of export in CSV. In Survey Monkey HTML is explicitly mentioned as an export option. While Smart Survey and Survey Gizmo do not specifically mention HTML as an export option, they do provide the possibility of running (summary) reports in HTML. These reports can be saved in HTML format. We regarded this as an HTML export option.

Smart Survey, Survey Gizmo, and Survey Monkey are the only platforms which provide the possibility of quick summary reports, including graphs. Smart Survey and Survey Monkey also provide the possibility of real-time reporting that can be shared with

others. This can be an advantage for keeping other members of the project up to date on the survey results.

3.4.4 Miscellaneous

Data entry

All platforms provide the respondents with the possibility of filling out the survey in more than one session without having to restart at the beginning. Some tools use dynamic URLs that change when new data is entered. When restarting the survey it will open at the question that was last answered by the respondent.

Survey Monkey works in a similar fashion, but it will only return to the page of questions following the one that was last completed. In other words, it works on a page level instead of a question level. So to make this work it is important to divide the questions over several pages.

Security

The security policies for the freeware self-hosted tools depend on the security policies of the server from which the tool is hosted. These were not included in this review. For this part of the review the terms and conditions of the three hosted tools were compared.

All tools describe their security measures in their terms and conditions. The most important for us is whether data collected from the respondents is dealt with confidentially and will not be used for any other purpose.

Smart Survey reports on data protection that they “will not in any circumstance use the information collected from our member’s surveys in any way. In addition, any other material you provide Smart-Survey (Including images, email addresses, etc.) will be held in the strictest confidence.” Similar clauses can be found in the terms and conditions of Survey Gizmo and Survey Monkey.¹²

Next to the terms and conditions, we also had a look at the certification of these tools. Smart Survey is hacker free and protected by McAfee security technologies.¹³ Survey Gizmo is certified by Authorize.net for protected online payments by credit card. It is also protected from hackers by McAfee security technologies.¹⁴ Survey Monkey is

¹² <http://www.smart-survey.co.uk/survey-software/security.asp>. For Survey Monkey see http://www.surveymonkey.com/Monkey_Privacy.aspx; For Survey Gizmo see <http://www.surveygizmo.com/the-fine-print/>.

¹³ <http://www.mcafeesecure.com/us/>.

¹⁴ <http://www.mcafeesecure.com/us/> and <http://www.authorize.net>.

certified by TRUSTe, Verisign, and BBB Online. The site is Hacker safe and protected by McAfee security technologies.¹⁵

In addition to all these data protection matters it is important for American companies to be on the Safe Harbour list. The European Commission's Directive on Data Protection¹⁶ prohibits the transfer of personal data to non-European Union nations that do not meet the European standards for privacy protection. The European Union and the United States take a different approach to the protection of personal data. To bridge the gap between the EU and USA and to offer American companies a way to comply with EU policies, a "Safe Harbour" framework was developed. American companies that are Safe Harbour certified comply with EU policies on data protection.

Since we are a European consortium and collecting data from European citizens it is important that—if we are to use American servers to store our data—the companies handling our data are Safe Harbour certified. Both Survey Gizmo and Survey Monkey are American companies and both are on the Safe Harbour list.¹⁷

Number of respondents

The first batch of e-mail invitations we will send may be as large as 35,000. If we estimate that about 10% of those invited respond, this means that the platform should be able to handle at least 3,500 responses per month. This is not the case for all platforms (see table below).

	Number of response per month Included in the subscription price
Ask People	Unlimited
Lime Survey	Unlimited
Smart Survey	1,000
Survey Gizmo (Personal ed.)	1,000
Survey Monkey	Unlimited

¹⁵ <http://www.truste.org/ivalidate.php?url=www.surveymonkey.com&sealid=102>; https://seal.verisign.com/splash?form_file=fdf/splash.fdf&dn=WWW.SURVEYMONKEY.COM&lang=en; <https://www.mcafeesecure.com/RatingVerify?ref=surveymonkey.com>; <https://www.bbb.org/online/consumer/cks.aspx?ID=1050310114031>.

¹⁶ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32000D0520:EN:HTML>

¹⁷ For Survey Monkey see <http://web.ita.doc.gov/safeharbor/SHList.nsf/1a9fe43696d-ddc75852569670050a37a/1fcc104602ab63385256f5b006b14ea?OpenDocument>; for Survey Monkey see <http://web.ita.doc.gov/safeharbor/SHList.nsf/f6cff20f4d3b8a3185256966006f7cde/b3a14b-be12905702852575050051f869?OpenDocument&Highlight=2.widgix>.

We assume that the platforms which include hosting have enough capacity to accommodate our capacity needs as we estimate that our expected number of responses is small compared to the overall number of responses the companies servers' have been processing every day so far. For the self-hosted tools Ask People and Lime Survey we would need to make sure ourselves that the deployed server has enough capacity. Based on the above-mentioned minimum needs, both Smart Survey and Survey Gizmo offer too little space.

Ease of use & Support

It is difficult to measure the learning curve objectively. Much depends on the knowledge and skills of the users, factors that are impossible to include in this review. But it is safe to state that there are certain features that help in making a survey tool easier to use. Earlier, we discussed the design features of the tools (see 3.4.1.). Most will agree that WYSIWYG editing possibilities make a tool easier to use, but when trying to discuss other features—is the lay-out well-organised? Are features easy to find?—knowledge and taste are the predominant determining factors.

Yet documentation and available (technical) support offered are also important here. Support is often a problem for freeware solutions like Ask People and Lime Survey. They depend wholly on donations. Support is often community-based and offered through a forum. Both tools were tested with a question about the skip logic features in their tools. With Lime Survey we received a response within 48 hours, but for Ask People it took more than a week.

Support is offered by e-mail or phone, but also by means of good documentation. The following table presents an overview of the means by which technical support is available from the different platforms.

	E-mail	Phone	Forum	Other
Ask People	√	-	√	-
Lime Survey	√	-	√	-
Smart Survey	√	√		√
Survey Gizmo (Personal ed.)	√	√	√	-
Survey Monkey	√	-	-	-

In addition to e-mail support Smart Survey has a 24/7 support ticket system. The Personal edition of Survey Gizmo does not include phone support, but Survey Gizmo does offer paid phone support at \$29.95 per incident.

The following table presents an overview of the kinds of documentation offered by the developers of the platforms under discussion.

	User manual	Tips and Tricks section	FAQ	Instruction videos	Other
Ask People	√	√	√	-	-
Lime Survey	√ (wiki)	-	√	-	-
Smart Survey	√	√	√	-	√
Survey Gizmo (Personal ed.)	√	√	√	√	√
Survey Monkey	√	√	√	√	√

Smart survey offers free online training for those with yearly subscriptions. On site training is also possible, but for this charges apply. Next to the instruction videos Survey Gizmo also offers free, live webinars at fixed dates throughout the year. A webinar is a workshop or lecture delivered over the Web. It can be a one-way webcast, or interactive conference between audience and presenter. Survey Gizmo's webinars are interactive; each webinar deals with a specific aspect of the platform, for instance reporting.

Besides the user manual, Survey Monkey also published two useful thematic guides: one on best practices for survey design and one on improving response rates.¹⁸

¹⁸ <http://www.surveymonkey.com/HelpCenter/HelpCenter.aspx>

4 The Survey Platform: Conclusion

	Ask People	Lime Survey	Smart Survey	Survey Gizmo	Survey Monkey
Web based	√	√	√	√	√
Hosted	-	-	√	√	√
Customisation lay-out	√	√	√	√	√
Add comments	√	√	√	√	√
Skip logic	-	√	√	√	√
Multiple types of questions	√	√	√	√	√
Own logo	√	√	√	√	√
Change fonts	√	√	√	√	√
Change colours	√	√	√	√	√
Generic look	√	√	√	√	√
Add Comments	√	√	√	√	√
Multiple type of questions	√	√	√	√	√
Multiple choice one answer	√	√	√	√	√
Multiple choice more answers	√	√	√	√	√
Essay questions	√	√	√	√	√
Rating scales	-	-	√	√	√
Drop down menus	√	√	√	√	√
Anonymous	√	√	√	√	√
Tracked	-	√	√	√	√
Both tracked and anonymous simultaneously	-	√	√	√	√
Filter	-	√	√	-	√
CSV	-	√	√	√	√
Excel	√	√	√	√	√
PDF	-	-	-	-	√
XML	-	-	-	-	√
HTML	-	-	√	√	√
Number of responses per month include in the subscription price	unlimited	unlimited	1,000	1,000	unlimited

	Ask People	Lime Survey	Smart Survey	Survey Gizmo	Survey Monkey
E-mail support	√	√	√	√	√
Phone support	-	-	√	√	-
Forum	√	√	-	√	-
Other support	-	-	√	-	-
User manual	√	√ (wiki)	√	√	√
Tips and Tricks section	√	-	√	√	√
FAQ	√	√	√	√	√
Instruction videos	-	-	-	√	√
Other documentation	-	-	√	√	√

Of the two self-hosted tools only Lime Survey can truly measure up to the hosted services. Ask People is an efficient yet simple and limited tool, not suitable for our project's survey. The problem with Lime Survey is support. Its mostly community-based. While it need not be a problem, a little test showed that it may take some time for your questions to be answered. In our case the question was answered in three days. In addition, Lime survey proved more difficult to use than other tools tested. It would imply a steeper learning curve than some of the other tools.

The paid services—Smart Survey, Survey Gizmo and Survey Monkey—do not differ that much, but Smart Survey and Survey Gizmo has one important disadvantage: the number of responses per month that are included in the subscription price. Survey Monkey gets the best marks and only lacks the possibility of phone support. Yet their e-mail support system works well and efficient In our little test we received an answer in less than 24 hours.

In some cases the differences are small, but taking the above-mentioned considerations into account, **Survey Monkey** is the survey platform of choice for the PARSE.insight survey.

5 The Forum Platform

5.1 Introduction

The growing prominence of scientific records that exist solely in a digital form may be leading us towards a Digital Dark Age. Digital records are not like physical records, which have been kept over centuries. Planning and diligence are required to maintain the ability to access a digital record from a physical medium and, more significantly, the ability to interpret the record once accessed.

No one organisation, nor even one country, can effectively address all these issues on its own and provide an approach that would be appropriate throughout Europe. Allowing a patchwork of preservation initiatives to develop throughout the individual countries in Europe would be counterproductive. Therefore it is desirable to establish a forum with the aim to exchange information, insight and best practice and harmonise local and sector/specific initiatives in preservation of digital scientific records.

As PARSE.insight addresses the very real risk that much of our scientific data and documentation may be lost to future generations unless permanent access is secured, it will stimulate continuous and effective scientific undertakings regarding digital preservation in Europe. Therefore, a vibrant multi-national, multi-disciplinary online forum will be initiated to co-ordinate dissemination of knowledge about digital preservation and to stimulate discussions between European stakeholders in research.

5.2 Objectives

The forum will facilitate and promote better understanding of how to establish and maintain consistent, robust and viable access to the records of research. It will raise awareness of digital preservation so that it becomes a mainstream activity within the information sector and it will make the scientific community aware of the many challenges in tackling the preservation problem.

5.3 Target audience

Participation in the forum will be open to all interested parties from projects funded by the Research Infrastructures initiative and the broader research community. The forum will primarily focus on individuals and organisations related to research in Europe which will cover stakeholders such as researchers, publishers, funding agencies and the preservation community at large.

5.4 Scope

As many factors play a role in keeping digital records alive, the forum will embrace a range of issues such as business models, technical standards and protocols, organisational, administrative aspects, legal and regulatory constraints and national and institutional funding structures.

5.5 Proposal

To create the envisioned forum an online platform needs to be developed and maintained. As PARSE.insight has limited resources and a finite lifetime, it is better to find a host that is willing and able to develop and sustain the forum. In this light, the European Alliance for Permanent Access¹⁹ was contacted. They responded enthusiastically and agreed to host and sustain the forum. The Alliance is a unique cross-sectored coalition of major stakeholders in science and scientific information. It was created in response to the work of a high-level task force during the Dutch Presidency of the EU in 2004 and addresses the risk that much of the research data and documentation that exists may be lost to future generations unless permanent access is secured.

The Alliance has adopted a strategic work plan to help consolidate awareness and understanding of permanent access as an issue at national, European and international levels. The forum will play an important role to disseminate and stimulate this awareness and understanding.

5.6 Approach and planning

Before the Alliance can start developing a forum, the following questions need to be answered by PARSE.insight:

1. Who is the target audience?
2. What should the forum offer?
3. What should it look like?
4. How will it be branded?
5. What will it cost (initial and maintenance)?

The first questions address the requirements of the forum itself. To answer these questions several people in different areas of science in Europe will be interviewed. For

¹⁹ European Alliance for Permanent Access to the Records of Science: <http://www.alliancepermanentaccess.eu>

the final question an estimation of the TCO (Total Cost of Ownership) will be provided which is based on the TCO of an existing and comparable forum, will be provided.

The timeline for specification, design, development and deployment of the forum is:

April 2009: define requirements (based on interviews and desk research)

May 2009 : final proposal including the specifications and an implementation plan

Sept 2009 : prototype forum online (ready before Insight & Gap Analysis Workshop)