



ISO 20252: Progress to date, future plans, & thoughts regarding its implications

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ISO 20252 : A Brief History

- 1974 Netherlands- 'Your opinion counts'
- 1976 UK – Interviewer Control Scheme (ICS)
- 1995 UK – Market Research Quality Standard (MQRS)
- 1997 UK – BSI 7911
- 1998/2000 Spain, Japan, Germany and Others: local standards
- 2002-2005 ISO specification and drafting
- 2006 ISO 20252 ratification
- 2009 ISO 26362 ratification
- 2012(?) ISO 20252 revision published

ISO20252 – Core Principles

- Global feasibility
- Technology free
- Clear definition
- ‘Hard’ criteria
- Auditable
- Practical

ISO 20252 – Core Content

- Quality Management System requirements
- Executive elements
- Data collection
- Data management and processing
- Project documentation

Quality Management System Requirements

- Contains key elements of ISO 9001 Quality Assurance
- Specifies documentation and project files
- Competency and training needs
- Role and management of sub-contractors
- Error/problem analysis and resolution

Executive Elements

- Proposals and cost quotations
- Project schedules
- User input
- Sample design and implementation
- Data processing
- Quality management and reporting
- Documentation and data records
- Reporting

Data Collection

- Fieldwork management, recruitment and training
- Fieldwork execution
- Validation
- Self-completion data collection
- Record keeping and documentation

Data Management and Processing

- Data entry
- Verification
- Coding
- Editing
- File management
- Analysis
- Delivery

Project Reporting

- Quantitative

- Qualitative

ISO 26362 content

- Access panel focus- essentially online
- Definitions
- Clarification of requirements for information regarding panel member provenance
- Panel management procedures, documentation and metrics
- Participation reporting- levels, partial completes, questionnaire lengths, quality control
- ISO 20252 cross-referencing

Implementation Issues

- Consistency
- External v internal auditing
- Interpretation
- Sub-contractors

Certification progress

- 300+ companies certified
- Widespread take-up in Australia, Netherlands, Spain, UK
- France and Sweden to commence in 2010
- Some take up in Germany, South Africa
- Local schemes in Italy, Mexico, Japan
- Canada and USA rolling out this year- Argentina and Brazil may follow

Certification progress

- Preferred approach is external auditing
- Single auditor- typically local Standards body
- Sharing of interpretation and inspection guidelines between countries via national associations
- Support from WAPOR, ESOMAR and EFAMRO
- Suggestion of take-up commencing in public sector and not for profit organisations
- Feedback from certification used to underpin current revision
- Need to make 'technology free'

The Audit Rationale

- Open and transparent
- Generates user confidence
- Contractually binding
- Defines processes and ownership
- Improves efficiency
- Reduces costs
- Stimulates 'fitness' debate
- Provides baseline for improvement
- Improves tendering process
- Enables enhanced design and user focus

Public Policy Research Implications

- Survey based performance indicator measurement growing rapidly
- A global phenomenon
- Many commissioners – governments, international agencies, NGO's
- Multiple users – policy makers, opposition, business, citizens – require a currency they can rely on
- Methodologist skills and experience relatively scarce
- Comparative survey specification and tender management is complex and requires scarce skills and resourcing
- External standards provide a framework

Public Accountability Requirements

- Survey based KPI's are growing
- Business and citizens will use legal framework to challenge results
- Providers of survey based KPI's be they international bodies, national governmental bodies, academic institutes or NGO's must be seen to be independent, rigorous and subject to external scrutiny
- Increased cost pressure and falling co-operation rates will require more flexible and shared approach to meeting 'fitness' needs

Conclusions

- Survey practitioners and users need a means of providing greater accountability and transparency to their stakeholders
- Comparative survey research practice additionally requires a means of controlling the performance of contractors that is consistent, understandable and measurable
- Large-scale comparative survey research projects are more and more like enormous turn-key engineering projects with a high level of technology utilisation
- These quasi-industrial processes require a response that is proportionate from their customers in terms of quality and cost performance management
- The audit based approach of ISO provides that opportunity giving transparent validation
- 20252 should be seen as the start point for quality management that enables users to append their own additional requirements for validation
- A closer engagement with the concept building on the input of bodies such as WAPOR should be encouraged