

**Welcome to the 2019  
International Field Directors & Technologies Conference!  
Some notes about attending IFD&TC:**

The organizers are happy to assist you with session selection, networking with other attendees and dinner plans if you like. You can spot an organizer by their nametags. A favorite of all conference attendees is our “Random Digit Dining” lunches. This is a great way to meet new people, and network. We want you to enjoy the conference so please be sure to let a conference organizer know if you need anything.

This program was emailed to you before the conference, and the schedule of events section is available online at: <https://ifdte.org/program-all/>.

A list of 2019 Attendees was emailed to you before the conference, and is available online at <https://ifdte.org/attendees/>.

**Conference Evaluations**

- We invite you to complete a conference evaluation by web survey, check your e-mail from Sunday, May 19<sup>th</sup> for a message containing your personalized link to the survey.
- You can keep revisiting the evaluation by clicking again on the link in your e-mail, until you hit “Submit” following the last question.

**Fun Events You Won’t Want to Miss:**

- Join us **Sunday afternoon at 6:00 p.m.** for a happy hour reception where you’ll enjoy light snacks and a cash bar. IFD&TC Organizers past and present want to welcome you to the conference!
- Some meals are included in your conference registration. Breakfast is served Monday through Wednesday mornings, and lunch is served on Monday and Tuesday. See the schedule for time and location of meals.
- Many IFD&TC attendees gather for drinks after sessions are over for the day. Weather permitting, check out the **Level Two** rooftop terrace on the second floor, or for an inside locale check the **Tundra Bar** off the lobby of the hotel on Monday and Tuesday evenings after scheduled events are over. Monday evening social events are available for sign up at <https://ifdte.org/social-events/>, through Sunday May 19. Some events may require tickets that could sell out, so plan your Monday evening activity as early as possible!

**Your 2019 IFD&TC Organizers:**

Chris Benson, NORC at University of Chicago  
Chris Corey, RAND Survey Research Group  
Kerryann DiLoreto, University of Wisconsin Survey Center  
Heidi Guyer, UM – Survey Research Center  
Kelly Elver, University of Wisconsin Survey Center  
Kevin Tharp, Indiana University Center for Survey Research  
Joyce Sweeney, Bureau of Labor Statistics  
Julie Brown, RAND Survey Research Group  
Bill Mockovak, Bureau of Labor Statistics  
Lindsey Witt-Swanson, University of Nebraska – Lincoln Bureau of Sociological Research



**IFD&TC 53rd Annual Conference**  
**May 19th-22nd, 2019**  
**Toronto, Ontario, Canada**  
**2019 Conference Program**

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Sunday May 19, 2019

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12:00pm-5:00pm on Sunday

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Check-In

Location: Conference Check-in Desk

Come to the IFD&TC registration table to check in and pick up your conference materials. Limited late conference check-in also available from 7:30 a.m. to 9:00 a.m. Monday morning.

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Session 4:00pm-5:15pm on Sunday  
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0A - All Speed Networking  
Roundtable Discussion

Location: Tom Thomson

Facilitator: Margaret Hudson, Chris Benson, UM-Survey Research Center (UM-SRC) | NORC at the University of Chicago

Session Focus: Speed Networking returns! Whether you are brand new to IFD&TC, or have been coming for years, speed networking is a great way to meet new people and kick off the conference with an informal chance to get to know other 2019 attendees. Join us for a fast paced speed networking session on Sunday afternoon before the happy hour reception.

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6:00pm-7:30pm on Sunday

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Welcome Happy Hour Reception

Location: Pool Terrace

IFD&TC organizers past and present welcome you to the conference.

Please join us for a happy hour reception featuring light snacks, a cash bar, and an informal time to visit with old and new friends. Dinner on your own after the reception.

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Monday May 20, 2019

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7:30am-9:00am on Monday

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Continental Breakfast

Location: Toronto I

Continental breakfast served.

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Registration Continues

Location: Conference Check-in Desk

If you arrived late to the conference, you have the opportunity to check in before the first session Monday morning at the IFD&TC registration desk.

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8:00am-8:30am on Monday

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Facilitator Breakfast

Location: Carmichael

All attendees facilitating a session at the conference are asked to attend a half hour breakfast meeting to go over facilitator guidelines and answer questions. If you've been a facilitator before, please come share your experiences with newer facilitators. If this is your first time, join us to meet others, and learn more about how facilitating works at IFD&TC.

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Session

1 9:00am-10:15am on Monday

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1A - All

The Changing Landscape of Human-Centered Questionnaire Development - Paul Beatty, Chief, Center for Survey Measurement, U.S. Census Bureau

Invited Address: Survey Methodology

Location: Toronto III

Facilitator: Jennifer Dykema, University of Wisconsin Survey Center

IFD&TC is very pleased to welcome Paul Beatty of the U.S. Census Bureau for the Field keynote address. This presentation considers how some of our common questionnaire development methods are evolving in response to shifts in survey modes, availability of new data sources, and other notable changes in the survey landscape.



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10:15am-10:45am on Monday

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Monday AM Break

Refreshments served.

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Session

2 10:45am-12:00pm on Monday

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2A -  
Field

Strategies to Improve Response Rates

Presentation & Discussion: Survey Methodology

Location: Toronto II/III

Facilitator: Tracy Keirns, University of New Hampshire

Session Focus: Learn more about techniques for formatting and introducing surveys, follow-up strategies that work, and call-in options to improve response rates.

Presentations:

- Third Time's a Charm? Systematic Analysis of the Effect of Sending a Third Questionnaire on Response Rates for Mail Surveys - John Stevenson, University of Wisconsin Survey Center; Jennifer Dykema, University of Wisconsin Survey Center
  - Operationalizing a Limited Effort Protocol and Call in Experiment on HRS 2018- Daniel Tomlin, UM-Survey Research Center (UM-SRC)
  - Fewer Pages or Respondent-Friendly Design: Which Leads to Higher Response? - Lindsey Witt-Swanson, University of Nebraska - Lincoln-Bureau of Sociological Research
  - License and Registration Please! Practical Steps to Promoting Survey Legitimacy - Ryan Callahan, Mathematica Policy Research
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2B - Cultural Considerations in Survey Research  
Field Presentation & Discussion: Survey Methodology

Location: Carmichael

Facilitator: Yu-chieh (Jay) Lin, UM-Survey Research Center (UM-SRC)

Session Focus: Presenters will share important advances in survey language translations, cultural considerations when adapting survey scales and recruiting special populations.

Presentations:

- Translating a Patient Experience Survey into Armenian: A Roadmap for Conducting Translations of Uncommon Languages - Georgina McAvinchey, RTI International
- Clean Air, Clear Scales: Experiment to Assess Scale Understanding Across Cultures- John Lee Pratt Holmes, Qatar University Social and Economic Survey Research Institute (SESRI)
- Response Rates After Longer Breaks in Interviewing- Dr. Roman Auriga, Leibniz Institute for Educational Trajectories
- Recruiting a Specialized Sample of Urban Native American Youth- Jen Parker, RAND Survey Research Group; Keisha McDonald, RAND Survey Research Group

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2C - Respondent Contact Protocols Across Modes  
Field Presentation & Discussion: Survey Methodology

Location: Varley

Facilitator: David Bergeron, RTI International

Session Focus: Join us for a session that focuses on different approaches to respondent contact protocols across modes.

Presentations:

- A Pre-Paid Cash Incentive Experiment - Beverly Weidmer, RAND Survey Research Group
  - Optimal Number of Call Attempts for a Complex, Multi-Stage Establishment Survey- Derek Stone, RTI International
  - The Impact of Certified Mail Follow-Up on Nonresponding Units- Dedrick Owens, U.S. Census Bureau
  - "I Already Did Your Survey" - Continuing to Explore How Repeat Phone Numbers Affect the Success of an Ongoing Surveillance Tool - Nikki Gohring, University of Nebraska Lincoln- Bureau of Sociological Research
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2D - Extending Technical Tools  
Tech Presentation & Discussion: General Tech (Hard Tech)

Location: Jackson

Facilitator: Eric White, University of Wisconsin Survey Center

Session Focus: Technical solutions frequently involve a mix of off-the-shelf and custom software. This session provides a mix of homegrown solutions and innovative extensions of licensed software products.

Presentations:

- Old Habits Die Hard: Re-Architecting Web Survey Systems from the Ground Up- Chris Griggs, RTI International
- A New Coding Application- Cheng Zhou, UM-Survey Research Center (UM-SRC)
- Expanding the Capabilities of a Third Party Survey Framework- Mikhail Thomas, IMPAQ International
- Maximizing Use of ODK, RedCAP and FreshService by Facility Staff and Research Nurses in Post Acute Care Settings: Lessons Learned from IMPACT Study - Emily Dao, RAND Survey Research Group; Rosa Elena Garcia, RAND Survey Research Group

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12:00pm-1:00pm on Monday

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Random Digit Dining - Monday Lunch

Location: Toronto

Bring your RDD lunch ticket and join us for lunch. Attendees are seated at tables according to the number drawn on their lunch tickets at check in. RDD lunch is a fun way to meet and get to know other attendees!

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Session 1:30pm-2:45pm on Monday  
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3A - Large Studies  
Field Presentation & Discussion: Center Management and Staff Training

Location: Toronto II

Facilitator: Gina Cheung, UM-Survey Research Center (UM-SRC)

Session Focus: Large scale data collection efforts provide unique opportunities for learning about center and staff management. This session will highlight multiple aspects of four large data collection efforts from different organizations.

Presentations:

- Laying the Groundwork for a Multi-Mode Study: Coordination and Quality Assurance Activities Across Different Teams and Data Collection Modes - Suzanne Caflisch, RAND Survey Research Group; Rosa-Elena Garcia, RAND Survey Research Group
- 700 Interviewers, 100,000 cases, 5 months? Oh My! - Kimberly Courey, NORC at the University of Chicago; Vicki Wilmer, NORC at the University of Chicago
- The 2020 Census Integrated Partnerships and Communications Program: A Research-Based Campaign - Kaile Bower, U.S. Census Bureau
- Managing Field Work for Improving Data Collection in a Large Scale Study: Experiences of the Malaysia Ageing and Retirement Survey - Gina Cheung, UM-Survey Research Center (UM-SRC); Yu-chieh (Jay) Lin, UM-Survey Research Center (UM-SRC)

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3B - Recruitment with Special Populations  
Field Presentation & Discussion: Survey Methodology

Location: Carmichael

Facilitator: Peter Batra, UM-Survey Research Center (UM-SRC)

Session Focus: Learn about cutting-edge methods for recruiting participants from specialized provider and patient populations.

Presentations:

- Recruiting Physicians in a Patient-Centered Medical Home (PCMH) Practice Setting for Research: Effective Strategies to Gain Cooperation - Chau Pham, RAND Survey Research Group; Rosa-Elena Garcia, RAND Survey Research Group
  - Efforts to Reduce Out-of-Scope Rates in the National Ambulatory Medical Care Survey - Melissa Kresin, U.S. Census Bureau
  - Mental Health Diagnosis and Survey Disposition Among Adult Users of Behavioral Health Services in Washington State - Kristen Petersen, Washington State University - Social and Economic Sciences Research Center
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3C - Small Shop Roundtable  
Field Roundtable Discussion: Center Management and Staff Training

Location: Varley

Facilitator: Kelleigh Trepanier, A.L. Burruss Institute - Kennesaw State University

Session Focus: Do you work in a small shop? Come discuss problems you face and solutions you've implemented given constraints in terms of size, budget, and organizational context. This roundtable will facilitate networking, sharing of ideas, and adapting to ensure that your small shop prospers.

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3D - Topics in Technical Infrastructure and Best Practice  
Tech Presentation & Discussion: General Tech (Hard Tech)

Location: Tom Thomson

Facilitator: Orin Day, RTI International

Session Focus: Presenters will provide an eclectic take on various infrastructure issues impacting survey centers. Many centers are experiencing pressure to migrate to cloud-based platforms for a range of services. Longstanding concerns regarding security and testing are also addressed.

Presentations:

- Benefits of Exploratory Testing Using Test Charters - Sangeetha Immani, RTI International
- Cloud Ascension: Architecting Intelligent Cloud Solutions - Chris Griggs, RTI International
- Security Vulnerabilities in Account Management - Anwar Mohammed, RTI International
- Shifting Sands - Addressing the Challenges of Windows 10 Updates to Field Laptops - Orin Day, RTI International; Jim Pratt, RTI International; YHung Mlo, RTI International
- RAPTER® 2.0: Enhancements to the Random Assignment, Participant Tracking, Enrollment, and Reporting System - Mark Lafferty, Mathematica Policy Research, Inc.

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2:45pm-3:15pm on Monday

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Monday PM Break  
Refreshments served.

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Session

4 3:15pm-4:30pm on Monday

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4A - Calling Strategies to Improve Response Rates and Other Key Metrics  
Field Presentation & Discussion: Survey Methodology

Location: Carmichael

Facilitator: Delicia Solis, MSU Office for Survey Research

Session Focus: Challenges and solutions in sampling and calling strategies for telephone and establishment surveys.

Presentations:

- Dual-Frame RDD or Mixed Mode? Where Do We Go from Here?- Lin Stork, MSU Office for Survey Research; Delicia Solis, MSU Office for Survey Research
- "Who You Gonna Call?" – a Responsive Design to Increase Calling Efficiency in a Telephone Survey - Sabina Kastberg, Office for National Statistics, United Kingdom
- Increasing Contact Rates and Completion Rates by Controlling Telephone Number in CATI - Margaret Collins, IMPAQ International, LLC; Kelly Daley, IMPAQ International, LLC; Jody Dougherty, IMPAQ International, LLC; John Wendt, IMPAQ International, LLC

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4B -  
Field

Fast-Paced Lightning Review of Data Collection Strategies to Improve Response Rates  
Lightning Session: Survey Methodology

Location: Tom Thomson

Facilitator: Heidi Guyer, UM-Survey Research Center (UM-SRC)

Session Focus: Join us for a lightning round of brief presentations on a wide range of topics including a review of incentive strategies and optimizing respondent recruitment using sampling and outreach strategies.

Presentations:

- To Invite or Remind? That Is the Question When Attempting to Optimize Respondent Outreach Mailings - Natalia Ibanez, Decision Information Resources (DIR); Heather M. Morrison, Decision Information Resources (DIR)
  - Using Organization Member Lists in Web Surveys to Achieve a Larger Sample Size- Peter Batra, UM-Survey Research Center (UM-SRC)
  - Evaluate the Benefits of Survey Link Delivery Options through Email and Texting in Mixed-Mode Survey Administration - Mihaly Imre, JSI Research & Training Institute, Inc
  - What Is Old Is New Again: Analog Outreach in the Digital Age- Heather Morrison, Decision Information Resources (DIR); Natalia Ibanez, Decision Information Resources (DIR); Krishna Epps, Decision Information Resources (DIR)
  - Seizing an Appertunity: Exploring App-based Survey Recruitment through Instagram and Facebook Ads - Yasamin Miller, Yasamin Miller Group
  - Tracking Allocation of Costs Across Studies: Development of a Software Solution- Chris Schlapper, University of Wisconsin Survey Center
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4C - IRB Challenges in 2019  
Field Roundtable Discussion: Center Management and Staff Training

Location: Varley

Facilitator: Janice Larson, Iowa State University - CSSM

Session Focus: This roundtable will provide opportunity to discuss the implications of recent IRB changes for survey shops as well as how to most effectively address those challenges.

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4D - Using Paradata and Statistical Modelling to Assess Survey Projects  
Tech Presentation & Discussion: General Tech (Hard Tech)

Location: Jackson

Facilitator: Brian Harnisch, Wyoming Survey and Analysis Center

Session Focus: What are the best data and methods for assessing the performance of various aspects of survey operations? Traditional statistical methods such as multiple regression as well newer data visualization techniques are considered in this session on use of paradata and statistical modeling.

Presentations:

- Managing Survey Operations Using Standard Tools of Project Management- Lee Beck, U.S. Census Bureau; Jared Gerstenbluth, U.S. Census Bureau
  - Using Multiple Regression to Develop a Predictive Response Rate Model for Field Interviewing - John Gloster, U.S. Census Bureau; Valerie Pianin, U.S. Census Bureau
  - Post-Survey Evaluation Using Tableau- Richard Holden, U.S. Bureau of Labor Statistics; Amar Mann, U.S. Bureau of Labor Statistics; Tian Luo, U.S. Bureau of Labor Statistics
  - Transforming Survey Paradata for Quality Control- Cheng Zhou, UM-Survey Research Center (UM-SRC)
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Session 4:45pm-5:45pm on Monday  
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5A - All Business Meeting (All Attendees)  
Location: Toronto II

Everyone is encouraged to attend the IFD&TC Business Meeting. Even if this is your first year attending the conference, your participation is welcome. The Business Meeting is where we discuss the future of the IFD&TC conference, elect new organizers, and learn about the location of future conferences.

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Tuesday May 21, 2019

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7:30am-9:00am on Tuesday

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Continental Breakfast

Location: Toronto I

Continental breakfast served

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Session

6 9:00am-10:15am on Tuesday

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6A - All

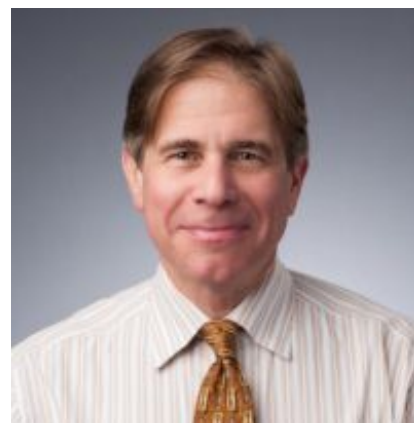
New Modes, New Data, Same Errors -  
Fred Conrad, Director, Michigan Program in Survey  
Methodology, University of Michigan

Invited Address: Field Tech (Soft Tech)

Location: Toronto III

Facilitator: Heidi Guyer, UM-Survey Research Center (UM-SRC)

Fred Conrad is a Research Professor at the University of Michigan's Survey Research Center. He will discuss several new and emerging modes for collecting conventional survey data (i.e., self-reports), specifically text messaging, virtual interviewers, and video-mediated interviewing. In addition, he will talk about two types of data that are not self-reported but may hold promise for social and behavioral research: sensor data collected with smartphones and social media posts, specifically tweets. He will suggest that the Total Survey Error framework continues to apply and can help improve quality across modes and types of data.



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10:15am-10:45am on Tuesday

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Tuesday AM Break

Refreshments served.

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Session 10:45am-12:00pm on Tuesday  
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7A - Challenges with Web Surveys  
Field Presentation & Discussion: Survey Methodology

Location: Tom Thomson

Facilitator: David Northrup, York University - Institute for Social Research

Session Focus: Survey research methods for web surveys continue to evolve. Come and learn more about recent challenges and solutions with web surveys on topics such as experiments in email recruitment, ways to encourage web response, and obtaining high data quality.

Presentations:

- Impact of Email Preview Panes on Web Survey Response Rates - Erica Moore, Indiana University Center for Survey Research
- Embedded Survey Questions: An Approach to Encourage Web Response in Mixed Mode Government Surveys? - Hannah Bent, Tetra Tech; Becca Cevilla, Tetra Tech
- Item Missing Data: Prompting Essential Questions - Ryan Yoder, UM-Survey Research Center (UM-SRC); Heather Schroeder, UM-Survey Research Center (UM-SRC)
- Increasing Web Response Rates on a Small Budget with a Sample of College Students - Noelle Poirier, IMPAQ International, LLC; Samuel Kofi Ampaabeng, IMPAQ International, LLC; John Wendt, IMPAQ International, LLC; Donna Perlmutter, IMPAQ International, LLC

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7B - Managing Centralized and Decentralized Interviewers  
Field Presentation & Discussion: Center Management and Staff Training

Location: Carmichael

Facilitator: Beverly Weidmer, RAND Survey Research Group

Session Focus: Presenters will share the latest on management tools, forecasting field production, employee satisfaction, and using dashboards to monitor and motivate data collection staff.

Presentations:

- Transforming Social Survey Management Information at the Office for National Statistics UK - Helen Batchelor, Office for National Statistics
- Better than a Crystal Ball? Trying to Forecast Field Production - Kimberly Courey, NORC at the University of Chicago; Kyle Fennell, NORC at the University of Chicago
- Assessing Employee Satisfaction and Intention to Leave among Centralized & Decentralized Interviewers - Heidi Guyer, UM-Survey Research Center (UM-SRC)
- Dashboards Dashboards Dashboards! - Kyle Fennell, NORC at the University of Chicago

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7C - Writing Cost Proposals  
Field Roundtable Discussion: Center Management and Staff Training

Location: Varley

Facilitator: Kelly Elver, University of Wisconsin Survey Center

Session Focus: Yearly roundtable for those involved in cost estimate and proposal writing.

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7D - Accessibility Standards and Testing  
Tech Workshop: Field Tech (Soft Tech)

Location: Jackson

Facilitators: Jeff Coburn, Institute for Community Inclusion at UMass-Boston, and Sandhya Bikmal, RTI International

Session Focus: The Section 508 standards have recently been revised and now incorporate WCAG guidelines. This workshop will focus on practical tests for the most common violations of WCAG Success Criteria that would specifically apply to web forms and surveys. While the talk will be on the more technical side, we will stay happily within the web browser, and feature some useful extensions, and away from command line or build tools. Key takeaways will be a better understanding of the guidelines; how they apply to surveys; and how to test for, and discover, the most common violations and issues.

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12:00pm-1:00pm on Tuesday

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Random Digit Dining - Tuesday Lunch

Location: Toronto I

Bring your RDD lunch ticket and join us for lunch. Attendees are seated at tables according to the number drawn on their lunch tickets at check in. RDD lunch is a fun way to meet and get to know other attendees!

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Session 1:30pm-2:45pm on Tuesday  
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8A - Pre and Post Incentive Strategies  
Field Presentation & Discussion: Survey Methodology

Location: Toronto II

Facilitator: Christy Storey, A.L. Burruss Institute - Kennesaw State University

Session Focus: Incentives are an important tool for obtaining higher response rates in the world of survey research. This session will explore pre- and post-interview incentive strategies, including monetary and non-monetary incentives and experimental designs.

Presentations:

- Implementing and Maintaining an Electronic Incentive (PayPal) in a Longitudinal Study - Alyson Miller, RTI International
  - Sequential Prepaid Incentives and Cover Letter Appeals: Effects on Response Rates, Data Quality, and Costs in an Address-Based Mail Survey - Jennifer Dykema, University of Wisconsin Survey Center
  - Effect of Monetary and Non-Monetary Post-Incentives on Response Rates to the Wisconsin Pregnancy Risk Assessment Monitoring System - Stephanie Hartwig, University of Wisconsin Survey Center
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8B - Interviewer Recruitment and Training  
Field Presentation & Discussion: Center Management and Staff Training

Location: Carmichael

Facilitator: Nick Schultz, University of Wisconsin Survey Center

Session Focus: Presenters will share valuable techniques in evaluating, recruiting & training new interviewing staff as well as the development of new fielding protocols.

Presentations:

- Using Text Analysis to Recruit Qualified and High-Performing Candidates- Carlos Macuada, UM-Survey Research Center (UM-SRC)
- Measuring the Impact of an Hours Expectation Document Upon Recruitment- Tina Vera, RTI International
- Designing a Distance Learning Training Package for In-Person Interviewers- Amanda Hall, Westat
- Multi-Phased Pilot Test for Implementing a Redesigned Establishment Survey- Samantha Rosner, NORC at the University of Chicago

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8C - Technical Challenges and Solutions in Center Management  
Field Panel Discussion: Center Management and Staff Training

Location: Jackson

Facilitator: Lew Berman, ICF

Session Focus: This panel will discuss two sets of challenges and solutions in center management. Telephone based surveys typically use supervisory staff to live-monitor interviewers or manually review recordings for effective speech rate, properly reading a question, and accurately recording a response. General industry practice is to review 5-10% of all calls. However, these practices are labor intensive, subjective, and the evidence for this range of review is anecdotal. This panel will discuss current call center practices and new technical solutions for improving these practices. Spam blockers are having an increasing impact on our ability to contact respondents by phone. Panelists will share research about spam blockers, how they affect centers with different telephone systems, and possible solutions to ensure your calls get through to study participants.

Panelists:

- Lewis Berman, ICF
  - Kate Hobson, NORC at University of Chicago
  - Steve Coombs, University of Wisconsin Survey Center
  - Kallan Larsen, UM-Survey Research Center (UM-SRC)
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8D - Geographic Data in the Service of Field Management  
Tech Presentation & Discussion: Field Tech (Soft Tech)

Location: Tom Thomson

Facilitator: Tim Olson, U.S. Census Bureau

Session Focus: Location data is playing an increasing role in the management of field survey operations. The presentations in this section demonstrate how geographic data can be used to detect falsification and maximize the productivity of field efforts.

Presentations:

- Where Have You Been?!? Providing Field Managers with Location Data to Monitor and Manage Field Staff - David Bergeron, RTI International
- Using GPS to Detect Falsifiers: Today's Practices, Tomorrow's Vision- Andrew Williams, Westat; Tammy Cook, Westat
- Developing a Customized, Google Maps API-driven Case Management Interface- Augie Salick, University of Wisconsin Survey Center

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2:45pm-3:15pm on Tuesday

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Tuesday PM Break

Refreshments served.

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Session 3:15pm-4:30pm on Tuesday  
9

9A - Effective Contact Strategies to Improve Response Rates  
Field Presentation & Discussion: Survey Methodology

Location: Toronto II

Facilitator: Ella Kemp, NORC at the University of Chicago

Session Focus: Presenters will focus on the latest improvements to contact materials and strategies, including using social media and text messages for respondent outreach and the effects of contact verification on response rates.

Presentations:

- Using Social Media to Contact Non-Responders in a Longitudinal Study- Peter Batra, UM-Survey Research Center (UM-SRC)
  - Using Text Messages for Data Collection in Two National Dental PBRN Studies- Casey A Easterday, HealthPartners Institute
  - Improving Respondent Engagement Through a Multi-Step Active Contact Verification Process - Morgan Jones, East Tennessee State University
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9B - Fast-Paced Lightning Review of Field Tech Strategies in Data Collection  
Field Lightning Session: Survey Methodology

Location: Carmichael

Facilitator: Jaime Faus, University of Wisconsin Survey Center

Session Focus: Don't miss this lightning round on a wide range of technical innovations and strategies on topics including video interviews, electronic signatures, and monitoring methods.

Presentations:

- Please Sign Here: Collecting Electronic Signatures for Consent and Incentives During CAPI Interviews - Rob Schultz, University of Wisconsin Survey Center
- Designing a Dashboard System for Floor Management, the Seating Information Tool (SIT) - Jason Rajan, NORC at the University of Chicago
- Considerations When Conducting Video-Mediated Survey Interviews - Kallan Larsen, UM-Survey Research Center (UM-SRC)
- Let the Respondent Do It - Leveraging Internet Self-Response to Improve Efficiency- Joshua Winston, U.S. Census Bureau; Michael Kowalyk, U.S. Census Bureau
- Response, What's It Worth? - Office for National Statistics's Big Incentives Review- Sabina Kastberg, Office for National Statistics, United Kingdom
- Utilization of the Drop-Off/Pick-Up Method in a Longitudinal Multi-Mode Data Collection Effort - Mark Miazga, University of Minnesota

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9C - Changes and Challenges in Fielding Federal Surveys  
Field Roundtable Discussion: Survey Methodology

Location: Jackson

Facilitator: Jennifer Draude-Wilson, Darine Zaatari, NORC | NORC

Session Focus: This open discussion will allow participants to discuss challenges and solutions when fielding federally funded surveys. Topics may include service contract act (SCA), government shutdowns over the past decade, data privacy and security issues and achieving target response rates.

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9D - Tech Showcase  
Tech Presentation & Discussion: General Tech (Hard Tech)

Location: Tom Thomson

Facilitator: Tim Sanders, American Society for Radiation Oncology

Session Focus: Browse the showcase tables and get a hands-on demonstration of hardware and software for data collection from those who develop and use it.

Presentations:

- New Network and rEMA Data Collection Tools - Patrick Habecker, University of Nebraska-Lincoln
- Introducing Real Time Progress Monitoring to Field Operations - Maria Ledgeway, Office for National Statistics, United Kingdom; Tracy Hobson, Office for National Statistics, United Kingdom
- RAPTER® 2.0: Enhancements to the Random Assignment, Participant Tracking, Enrollment, and Reporting System - Mark Lafferty, Mathematica Policy Research, Inc.
- Aura Survey Designer - A Windows Client Application Providing a User Friendly Respondent Web Application - Ramonia Davis, USDA- NASS

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Session 4:45pm-6:00pm on Tuesday  
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10A - Tech Talk  
All Roundtable Discussion: Field Tech (Soft Tech)

Location: Varley

Facilitator: Gina Cheung, UM-Survey Research Center (UM-SRC)

Session Focus: Join attendees with an interest in the technical aspects of survey research for a special roundtable discussion. The open format allows for a range of soft tech management topics and current events impacting survey center technical operations.

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Wednesday May 22, 2019

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7:30am-9:00am on Wednesday

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Continental Breakfast

Location: Toronto I

Continental breakfast served.

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Session 9:00am-10:15am on Wednesday  
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11A - Ancillary Data Collection  
Field Presentation & Discussion: Survey Methodology

Location: Varley

Facilitator: Jessica Maleryn, NORC at the University of Chicago

Session Focus: Each year, survey researchers are asked to collect more types of non-survey data. This session will share details of implementing some of the most popular types of ancillary data collection such as physical measures, blood and microbiome samples, actigraphy, ecological momentary assessment, and sleep diaries.

Presentations:

- Utilizing Unique Data Collection Methods Among a 65+ Population- Kelly Pudelek, NORC at the University of Chicago
- Ancillary Data Collection for the NAYSHAW Project- Jen Parker, RAND Survey Research Group; Keisha McDonald, RAND Survey Research Group
- Microbiome Data Collection Within a Complex Survey- Ryan Buechel, NORC at the University of Chicago

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11B - Current Trends in Multi and Mixed-Mode Data Collection  
Field Presentation & Discussion: Survey Methodology

Location: Tom Thomson

Facilitator: Kyle Fennell, NORC at the University of Chicago

Session Focus: For years, presenters and panelists at IFD&TC, AAPOR, and other conferences have worried about impact of decreasing survey participation and tight budgets on primary data collection efforts. Multimode data collection holds out the promise of better response rates, reduced cost, and other benefits. Join us for a session that will examine potential benefits and perils of implementing multimode data collection across a range of considerations, including project management, special respondent populations, and interviewers.

Presentations:

- Tips and Warnings about Multi-mode Data Collection: Lessons From the Field.- Kyle Fennell, NORC at the University of Chicago
  - Use of Web and Other Modes of Data Collection Among Elderly and Oldest Old Health Plan Members: Results of the Multiple Chronic Care Among Elderly Study - Rosa Elena Garcia, RAND Survey Research Group
  - Measuring Interviewer Impact In Mixed-Mode Surveys- Leah Roberts, UM-Survey Research Center (UM-SRC)
  - The Impact of Sending a Second Follow-Up Letter in Multi-Mode Individual Surveys- Joelle Poulin, Institut de la Statistique du Québec
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11C - Monitoring Interviewers and Ensuring Quality Control  
Field Presentation & Discussion: Center Management and Staff Training

Location: Carmichael

Facilitator: Hillary Hanson, University of Chicago Survey Lab

Session Focus: This session will focus on systems and strategies to assess data quality and protocol standardization among interviewers.

Presentations:

- The Use of a Centralized Monitoring Evaluation System to Assess Trends and Interrater Reliability - Stacey Bell, RTI International
- How to Improve the Quality Control Assessment Process and its Efficiency: Lessons Learned from a Data-Driven Approach - Yu-chieh Lin, UM-Survey Research Center (UM-SRC)
- Promoting Data Quality and Protocol Standardization in Multi-Vendor Data Collection Efforts - Joshua Wolf, RAND Survey Research Group; Deborah Kim, RAND Survey Research Group

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11D - Trading Small Shop Tech Tools and Tips  
Tech Roundtable Discussion: Field Tech (Soft Tech)

Location: Jackson

Facilitator: Ellen Malven, Jan Larson, Iowa State University - Center for Survey Statistics & Methodology (CSSM) | Iowa State University - Center for Survey Statistics & Methodology (CSSM)

Session Focus: During this roundtable discussion, small shops are invited to share the tools and tech that aid in their own operations, while also learning about new tools and tech used by other shops.

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10:15am-10:45am on Wednesday

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Wednesday AM Break  
Refreshments served.

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Session

12 10:45am-11:45am on Wednesday

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12A -  
All

Survey Says! Closing Session

Location: Toronto II

Only the cool kids stay for the final session of IFD&TC this year! Root on your fellow attendees in a Family Feud-inspired showdown, as they play for fame and bragging rights. Stay tuned for more details and *the* survey questions!

**2019 IFD&TC Business Meeting Agenda**  
**Monday, May 20, 2019 at 4:45 p.m.**  
**All Attendees Welcome**

- 1) **Welcome and Introductions**
- 2) **Review and Approval of 2018 Conference Minutes**
- 3) **Registrar's Update**
- 4) **Site Update**
- 5) **Description of the IFD&TC Organizing Process (Yellow indicates election required today).**

<b>Org Position</b>	<b>Current</b>	<b>Term Length</b>	<b>Elected</b>	<b>Term</b>	<b>Next Election</b>	<b>Next Slot Term</b>
Co-Registrar	Kelly Elver, UWSC	4 years	2016	2017-2020	2020	2021-2024
Co-Registrar	Kevin Tharp, IUCSR	4 years	2017	2018-2021	2021	2022-2025
<b>Co-Site</b>	<b>Joyce Sweeney, BLS</b>	<b>4 years</b>	<b>2015</b>	<b>2016-2019</b>	<b>2019</b>	<b>2020-2023</b>
Co-Site	Julie Brown, RAND SRG	4 years	2017	2018-2021	2021	2022-2025
Co-Treasurer	Bill Mockovak, BLS	4 years	2018	2019-2022	2022	2023-2026
Co-Treasurer	Lyndsey Witt-Swanson, UNL-BOSR	4 years	2016	2017-2020	2020	2021-2024
<b>Program Position</b>	<b>Current</b>	<b>Term Length</b>	<b>Elected</b>	<b>Term</b>	<b>Next Election</b>	<b>Next Slot Term</b>
Large Shop Field	Heidi Guyer, UM-SRC	2 years	2018	2019-2020	2020	2021-2022
<b>Small Shop Field</b>	<b>Kerryann DiLoreto, UWSC</b>	<b>2 years</b>	<b>2017</b>	<b>2018-2019</b>	<b>2019</b>	<b>2020-2021</b>
<b>Large Shop Tech</b>	<b>Chris Benson, NORC</b>	<b>2 years</b>	<b>2017</b>	<b>2018-2019</b>	<b>2019</b>	<b>2020-2021</b>
Small Shop Tech	Chris Corey, RAND SRG	2 years	2018	2019-2020	2020	2021-2022

- 6) **Election of New Organizers**
- 7) **Treasurer's Report**
- 8) **Other New Business or Discussion**

**Your Meeting Notes:**

**2018 IFD&TC Annual Meeting Minutes for Review and Approval by  
2019 IFD&TC Registered Attendees**

**2018 Business Meeting Facilitated by IFD&TC Organizing Team Members,  
Kelly Elver, Joyce Sweeney, Julie Brown, Kerryann DiLoreto, and Chris Benson**

**AGENDA:**

- **Welcome and Introductions**
- **Review and Approval of 2017 Conference Minutes**
- **Registrar's Update**
- **Site Update**
- **Description of the IFD&TC Organizing Process**
- **Election of New Organizers**
- **Treasurer's Report**
- **Small Shop Outreach Working Group Chair's Update/Results of Web Survey**
- **Other New Business or Discussion**

Kelly Elver (University of Wisconsin) Co-registrar called the meeting to order, welcomed everyone, and introduced this year's organizing committee.

-Kelly Elver (Co-registrar)  
-Martha Belanger (Co-registrar)  
-Chris Benson (Tech Organizer)  
-Adam Zammit (Large Shop Tech Organizer)  
-Julie Brown (Site Organizer)  
-Joyce Sweeney (Site Organizer)  
-Kerryann DiLoreto (Large Shop Field Organizer)

Kayla Dean (Small Shop Field Organizer) dropped off the committee in April as she had recently left her employment and was no longer involved in survey work at that time.

**Review and Approval of 2017 Conference Minutes**

Minutes of 2017 conference were reviewed and no comments were made. Merrill Shanks, University of Berkeley made a motion to accept the minutes, Orin Day, RTI International, seconded the motion. Motion approved unanimously.

**Registrar Update - Kelly Elver**

Kelly reported on the status of for-profit staff participation. This was the first year that staff from for-profit organizations have been allowed to attend the conference, only if they appear on the program. Eleven staff members from for-profit companies came and presented at the conference this year. We will continue with this policy for the 2019 conference, and then review the impact and if we should continue for the 2020 conference.

This year 204 registered for the conference. This is about average. The charter caps registration at 250.

**Site Update - Joyce Sweeney and Julie Brown**

Joyce Sweeney and Julie Brown reported on the sites for next two years.

- 2019 will be at the Hilton in Toronto Canada.
- 2020 will be in Atlanta.

AV costs were discussed as a major cost driver for the conference. Hosting two fewer breakout rooms would open up the hotel options the conference could consider. We are struggling to fill sessions each year so want to consider holding fewer sessions. Organizing team will look at holding four sessions in place of six sessions each time slot.

Next, the issue of discontinuing our tradition of following AAPOR was discussed. By separating from them, we could pick our own site and save on taxes. We could go to states that recognize our 501C3 status. We also may attract

attendees who simply find attending AAPOR and IFDTC sequentially too long to be away from home and work if we considered moving to another time of the year.

Attendees were reminded to stay at the conference hotel as that does help with the room rates.

**Explanation of Officer Terms:**

Org Position	Current	Term Length	Elected	Term	Next Election	Next Slot Term
Co-Registrar	Kelly Elver, UWSC	4 years	2016	2017-2020	2020	2021-2024
Co-Registrar	Vacant	4 years			2018	2019-2022
Co-Site	Joyce Sweeney, BLS	4 years	2015	2016-2019	2019	2020-2023
Co-Site	Julie Brown, RAND	4 years	2017	2018-2021	2021	2022-2025
Co-Treasurer	Bill Mockovak, BLS	4 years	2014	2015-2018	2018	2019-2022
Co-Treasurer	Lyndsey Witt-Swanson, UNL	4 years	2016	2017-2020	2020	2021-2024

Program Position	Current	Term Length	Elected	Term	Next Election	Next Slot Term
Large Shop Field	Kerryann DiLoreto, UWSC	2 years	2016	2017-2018	2018	2019-2020
Small Shop Field	Kayla Dean, HP	2 years	2017	2018-2019	2019	2020-2021
Large Shop Tech	Chris Benson, NORC	2 years	2017	2018-2019	2019	2020-2021
Small Shop Tech	Adam Zammit, ACSPPR	2 years	2016	2017-2018	2018	2019-2020

**Election of 2019 Organizers:**

Kelly Elver thanked Martha Belanger for stepping up and serving as co-registrar for this year. This was only temporary and we still need a co-registrar to begin working with Kelly, as she will be done with her term in 2020 and plans to step down from this position. Kelly did send out an email to all participants and the IFDTC mailing list explaining that we need a co-registrar and asking if anyone could consider the position. There was no response to her email and no volunteers or nominations at the meeting. For now, the co-registrar position is unfilled. An appeal may go out to organizations directors asking them if they have any suggestions or know of someone in there organization that could fill the position. Also organizing team could appoint someone.

Kelly also thanked Kerryann DiLoreto for fulfilling her term as Large Shop Field Organizer, and Adam Zammit for his work as Small Shop Tech Organizer. Kayla Dean, the Small/Medium Shop Field Organizer elected last year has stepped down having left her position at an eligible organization. Kerryann DiLoreto has agreed and been appointed to fill in and finish the term for Kayla. Next year an election will be held to fill the position on its usual rotation.

Kelly shared with attendees the criteria for volunteering and being recruited to serve as an organizer within IFD&TC. “The cycle of selecting organizers is a combination of large shop/small (medium) shop and field and tech. You may

volunteer when you register for the conference, or you may e-mail or talk with any current or past organizer. You just need to make sure we know you are interested. Once you have made it known you would like to help on the Organizing team, your name is included in a database, so yes, we track who has offered to serve. Not only do we track the names of volunteers, but we also look at organizations that have had people on the Organizing team in recent years so we can spread the responsibility as widely as possible. Our greatest challenge seems to be small shop tech. Some have served more than once; we've broadened that category to include some medium or large shop folks that have some small shops in their organizations. The rotation can take some time, but we do want you to continue to let us know you are willing to help and keep attending the conference as that's also a factor considered. This is not an exclusive club and we want you to feel a part of all that goes on, but be patient, even if you've volunteered year after year, with all the factors to consider, as noted, it takes time. One more note before we move on to nominations, when you have volunteered and the rotation is right, you will be contacted prior to the conference to allow you time to discuss commitments with your organization to make sure you have their approval and support to serve. So in light of this, let me explain that we have had such conversations this year with two nominees who have already spoken with their organizations and received approval. We also welcome nominations from the floor, and if the person nominated (from the floor) accepts the nomination, we'll take a brief recess, to allow the nominee to speak with their organization to validate support for the nomination. When the new nominee has had opportunity to do this then the election of officers will proceed in the normal fashion, i.e. voting by ballot if there is more than one nomination". This being said if there are no questions, we'll proceed with the election of 2019/20 organizers.

Christopher Corey from RAND was nominated as Small/Med Shop Tech Organizer.

Heidi Guyer from UM Survey Research Center was nominated as Large Shop Field organizer.

Bill Mockovak, BLS was nominated to serve as co-treasurer.

All nominations were accepted and all were elected unanimously.

### **Treasurer's Report**

In accordance with the bylaws, Bill Mockovak, Bureau of Labor Statistics, and Lindsey Witt-Swanson, University of Nebraska-Lincoln Bureau of Sociological Research, prepared the 2017 Treasurer's report. (See attached.)

According to the bylaws, Section 5.2.5 notes:

"The Treasurers shall report the status of the organization funds to the membership at the business meeting of the annual conference and file all necessary papers and forms for the organizations required by law.

The Treasurers shall be responsible for submitting the annual financial report for approval by the Board of Directors. The financial report shall be presented for discussion at the meeting prior to the annual meeting. The financial report shall be approved at the annual meeting."

The Treasurer's report is posted on the IFD&TC website.

1. The annual treasurer's report covers the previous calendar year, thus this report covers 2017. All papers and forms required by law have been submitted and as mentioned a current financial report is in your conference program.
2. Experience has shown a bank balance around \$20-\$30 thousand is sufficient as start-up funds for the next fiscal year. Hotels have required deposits of up to \$12,000 in advance of registration, so this number was raised from past years where \$10 to \$15 thousand was sufficient.
3. The organizers have approved the 2017 Financial Report

Motion was made by Bill Connett and seconded by Tim Olson to accept the treasurer's report.

Motion was approved unanimously.

### **Small Shop Workgroup Update**

A small shop workgroup was formed in the Fall of 2017 to address some concerns of some small shops. The group was chaired by David Northrup (York University-Institute for Social Research). David gave a presentation on the results of the survey that the group constructed and emailed to each person on the IFD&TC mailing list. Approximately 1000



surveys were emailed out and about 300 responses were received. The survey indicated that the role of small shops in IFDTC remains strong, and that the new commitment to including small shops and their many contributions is appreciated. IFDTC will continue to attempt to have a small shop track through the conference with sessions aimed at small shop attendees to make sure the needs of these valuable participants are met. Results showed that cost was not a major factor in small shop attendance. Other factors that are common to all attendees such as not having enough time to come every year, or not being able to attend if they did not have a presentation on the program were found to be more important deterrents to attendance for small shop attendees than cost.

The full presentation is available from David Northrup, and will be posted on the conference web site.

### **New Business**

No new business was discussed. Organizing committee thanked everyone for attending. Meeting adjourned at 5:45. Approximately 60 attendees were present.

Respectfully submitted, Martha Belanger, Acting Co-Registrar, IFD&TC.

*NOTE: These minutes have been reviewed and approved by the IFD&TC Organizers.*

**International Field Directors and Technologies Conference  
Financial Report for Calendar Year 2018**

Submitted by Bill Mockovak, BLS; Lindsey Witt-Swanson, UNL-BOSR, Co-treasurers

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Balance as of 1/1/2018	\$ 28,613.61
Balance as of 12/31/2018	<u>\$ 41,649.57</u>
Net Increase	\$ 13,035.96

**Revenue**

From 2018 Conference	\$ 112,224.99
Interest Income from bank account	<u>5.81</u>
Total Revenue	\$ 112,230.80

**Expenses**

Conference-related expenses	\$ 97,598.00 (includes Bank of America processing fees)
General operating expenses	<u>\$ 1,596.85</u>
Total Expenses	\$ 99,194.85

**Net Increase** \$ 13,035.95

**\*General Operating Expenses.** Include the following:

• Director's and Officer's Insurance	\$724.00
• Services of a registered corporate agent	\$207.00
• Corporate registration fee (Virginia)	\$ 25.00
• Cost of income tax preparation by a CPA	\$620.00
• USPS charges	<u>\$ 20.85</u>
	Total \$1,596.85

Conference expenses include conference facilities and food; AV equipment; registration materials, services, and bank processing fees; website programming; site visits; and planning.

IFD&TC is incorporated for financial/tax reasons in the State of Virginia.

Information submitted by Bill Mockovak on March 4, 2019.



### **Goodbye to Our Dear Friend, Rita Koontz (1947 - 2018)**

In September of 2018, the IFD&TC community learned the heartbreaking news of the death of our dear friend and longtime registrar, Rita Koontz. Rita passed away on Saturday September 15, 2018, after a 5-month bout with bone cancer.

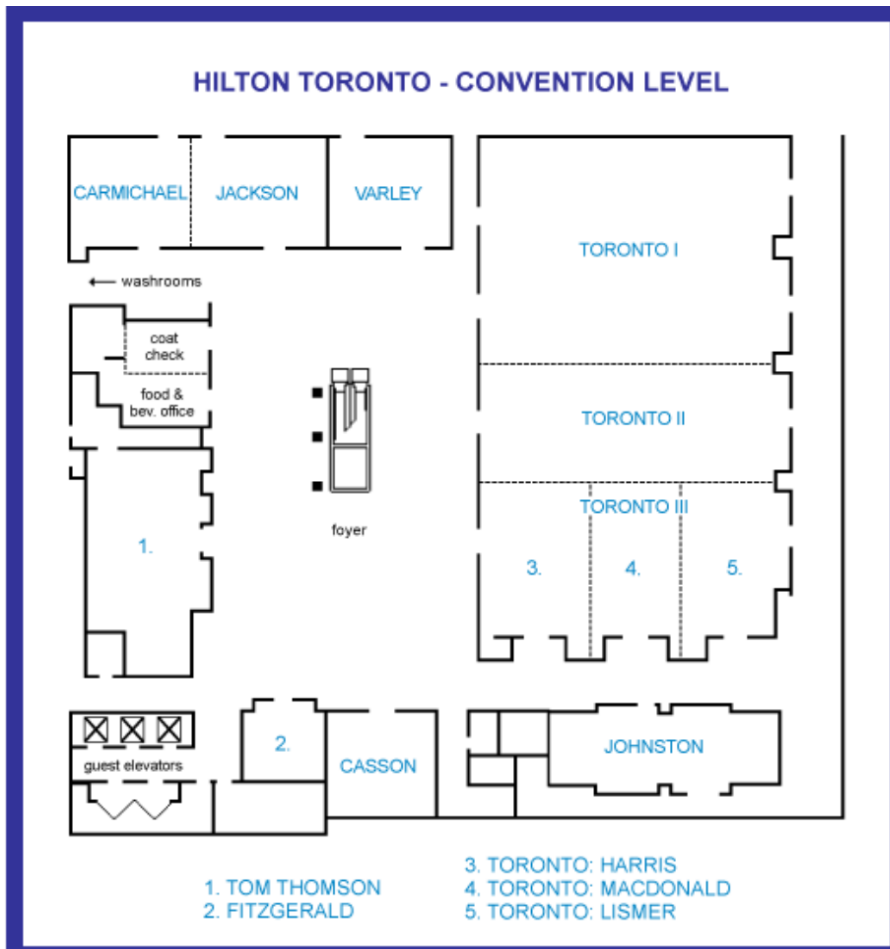
Rita was a mentor to so many of us in our survey research careers. She was a mainstay to the conference for over 20 years, keeping it organized, helping to ensure its continuation, and making it a welcoming and nurturing environment for brand new attendees and people who had been attending for decades alike.

Rita began assisting with the organization of the conference in 1994, and went on to become Conference Registrar in 1996. After a number of years training volunteers to take over from her, she stepped down from the Registrar role upon her retirement in 2015. Even after retirement, she was always willing to share her sage advice and historical knowledge of the conference. Her kindness and thoughtfulness were legendary.

Rita meant so much to so many people. She helped to create a very special culture within IFD&TC that is not often found in professional organizations. Our deepest sympathy to everyone who knew her. She will be greatly missed.

More information about Rita and some special messages from her family and from her colleague Don Dillman are available on our website at <https://ifdtc.org/rita-koontz/>.

*First Floor Conference Space Map*



**MEETING ROOMS  
(listed alphabetically)**

- Carmichael
- Fitzgerald
- Harris
- Jackson
- Johnston
- McDonald
- Lismer
- Tom Thomson
- Toronto 1 Ballroom
- Toronto 2 Ballroom
- Toronto 3 Ballroom
- Varley

