

Session 12A, Roundtable Discussion: Hiring, Training and Developing Project Managers

Kelly Elver

UW Survey Center
University of Wisconsin Madison
kelver@ssc.wisc.edu

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Project Director Training at the UW Survey Center

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UWSC Project Direction Overview

- UWSC Project Direction Structure
 - Project Directors at UWSC are primarily in charge of implementation of all types of survey projects, from research project design to data delivery.
 - UWSC currently has a staff of 14 Project Directors, up from 4 a decade ago.
 - All UWSC Project Directors direct between 3 and 8 projects at a time, and many specialize by mode, such as CAPI or CATI surveys.
 - UWSC Project Directors range from junior to senior, with between 2 and 15 years of experience, so we are often training new staff, but also retraining and updating experienced staff.

UWSC Project Direction Training Needs

- UWSC Project Director Training Manual
 - UWSC used to maintain a paper training manual, but found it was obsolete almost as soon as it was printed.
 - About 5 years ago when Dr. Jennifer Dykema joined the UWSC as our Survey Methodologist, we began to collaborate on creation of a modular, electronic set of documents for UWSC PD's that could be easily updated, and act as a central repository for information needed by the staff to direct projects.
 - This document is updated continuously as UWSC protocols change.

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- **Templates**
 - [Coverletter template for sending respondent a check](#)
 - [Check template](#)
 - [Letterhead \(blank, generic\)](#)
 - [Mail Database Template \(Access file\)](#)
 - [Memo template \(blank UWSC memo header\)](#)
 - [PDOM overview of UWSC memo template](#)
 - [Powerpoint template for presentations](#)
 - [Project director progress report template](#)
 - [Questionnaire review template](#)
 - [Template \(blank\) to use to layout an SAQ for a Mail survey](#)

- **Trainings and Seminars**
 - [Access Training \(Powerpoint\)](#)
 - [CASES Training](#) includes
 - “CASES_Variables_cheatsheet,” “CASES55_controlpanel,” “CASESTrainingpt2_datadelivery”

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REFERENCES AND RESOURCES

Glossary of Commonly Used Terms

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Term	Definition	Elaboration	Why We Care	Further Information
AAPOR	The American Association for Public Opinion Research is <i>the</i> leading association of public opinion and survey research professionals.	The AAPOR community includes producers and users of survey data from a variety of disciplines. Our members span a range of interests including election polling, market research, statistics, research methodology, health related data collection and education.	AAPOR is one of our flagship organizations and sets a number of standards (such as how to calculate response rates) that UWSC follows.	http://www.aapor.org/Home.htm
ACASI	Audio computer-assisted self-interviewing (ACASI)—by which respondents answer pre-recorded questions during an in-person interview.		Preferred method for administering sensitive questions in face-to-face interviews because it often yields higher reports of sensitive behaviors compared to interviewer administration.	Turner and Smith (1996)
Acquiescence	Tendency for respondents to endorse a question (i.e., respond affirmatively by saying “agree”, “yes”, or “true” for example) regardless of the content of the question (regardless of what is really true for them). We often refer to the occurrence of acquiescence as acquiescence bias.	Acquiescence varies by respondent characteristics (more likely among respondents with less education, lower intelligence, lower social standing), question characteristics (more likely when questions are difficult or respondents are fatigued), and survey characteristics (more likely with telephone versus face-to-face interviewing).	Our goal in writing survey questions is to have respondents’ answers vary because of their true answer for a question not because of the way in which the question is asked or formatted. One method for reducing acquiescence is to avoid using “agree/disagree”, “true/false”, or	Krosnick and Presser (2010, p. 275-277)

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NETWORK AND DIRECTORY STRUCTURES

Network Templates for Naming Directories

This document discusses network templates for naming directories. The following topics are addressed:

- [What](#)
- [Why](#)
- [Implementation](#)
- [Changing any part of this](#)
- [Network template for naming survey directories](#)
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What

- Link to listings of directories to use for face-to-face/CAPI surveys, telephone surveys, mail surveys, and focus groups appears at the end of this document.
- Templates with these directories for the modes listed above have been created and stored in:
 - Face-to-face/CAPI surveys
 - Q:\GENERAL\Project_Directors\Project_Director_Training_Manual\Face-To-Face_CAPI_Surveys\Directory_Template
 - Phone surveys
 - Q:\GENERAL\Project_Directors\Project_Director_Training_Manual\Phone_Surveys\Directory_Template
 - Mail surveys
 - Q:\GENERAL\Project_Directors\Project_Director_Training_Manual\Mail_Surveys\Directory_Template
 - Focus groups
 - Q:\GENERAL\Project_Directors\Project_Director_Training_Manual\Focus_Groups\Directory_Template

Why

- In the process of documenting steps taken in creating a merge file from an original sample file, you will need to make a permanent record and store the original sample file and the cleaned sample file used to merge. UWSC policy is that these files need to be stored in uniformly named directories.
- Having all PDs use a standard template makes it easy for anyone to find a particular file of a given type.

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MAIL SURVEYS

PROJECT MANAGEMENT OVERVIEW

This document provides information regarding standard UWSC protocols for managing mail surveys. While each project has specific requirements, the topics discussed in this document are among those that need to be considered as a PD plans and implements a mail survey.

- [Background](#)
 - [Preparing a Mail Survey for Field Overview](#)
 - [Mail Survey Materials](#)
 - [Communicating with Clients, Mail and Data Entry, Programming and Other UWSC Staff](#)
 - [Preparing the Sample](#)
 - [Field Issues](#)
 - [Preparing for Data Delivery and Project Close Out](#)
 - [Special Topics](#)
 - [Additional Resources](#)
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- **[Background](#)**
 - Mail surveys have many possible structures, and every mail survey conducted by UWSC will have project-specific issues that you will need to address. This document is meant to provide some guidance as you work with clients, vendors, and UWSC staff in field and programming to implement your project. Mail survey cost proposals are the most reliable source of information regarding the protocols for a given survey. Please place a copy of the cost proposal in the Proposal folder in the Home directory of your project, and refer to it for protocol information. If the cost proposal is not clear, or protocols change after the project is assigned to you, see Kelly or John for approval to deviate from the protocol or for clarification.
 - **[Preparing a Mail Survey for Field Overview](#)**
 - PDs review most mail surveys for clients. This process involves creating a mock-up instrument for the client to review and sign off on.
 - For information on how to review an instrument and how to format a mail survey, see [Questionnaire Design](#) in the PD Training Manual Table of Contents.
 - These reviews and mock-ups are typically created in Word, and have a great deal of formatting applied to help the client see how the survey questions will appear as a final product.
 - Draft surveys are exchanged with clients during the survey development process. Some things to keep in mind during this stage of the project include:

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DATA DELIVERY Checklist

This document provides a checklist of steps to follow in order to deliver data to your client. The following topics are addressed:

- [Data Delivery Checklist \(Reduced Version\)](#)
- [Data Delivery Checklist \(Expanded Version\)](#)
- [Special Topics](#)
 - [Respondent removal of case identification numbers](#)
 - [Converting files from SPSS to other programs](#)
- [Additional Resources](#)
 - [SSCC SPSS training sessions](#)
 - [SPSS video modules](#)
 - [SPSS Starter Kit \(Learning Modules\) at UCLA](#)
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Data Delivery Checklist (Reduced Version)

- [Before Programmers Deliver Data](#)
 - [Verify skip patterns are functioning correctly](#)
 - [Verify which program client is expecting data will be delivered](#)
 - [Review timeline for data delivery with programmer](#)
 - [Check status of variables in q files and SPSS cleaning files](#)
 - [Deal with open-ended and other-specify items](#)
 - [Verify that variables that should **not** be outputted with the dataset are omitted](#)
 - [Review special output variables with the programmer](#)
 - [Verify the number of completes](#)
 - [Run a reconciliation](#)
 - [Secure a method and place for handing off data to the client](#)
- [After Programmers Deliver Data](#)
 - [Verify that all of the files you need are in the Delivered folder](#)
 - [Reconcile the status of any missing files](#)
 - [Open the dataset and verify that its internal structure is correct](#)
 - [Reconcile any inconsistencies in the internal structure of the dataset](#)
 - [Run initial frequency distributions for every variable in the dataset](#)
 - [Review each frequency distribution and verify there are no errors](#)
 - [Make a copy of the dataset before you make any changes](#)
 - [Open a new version of the dataset](#)
 - [Create a syntax file](#)
 - [Correct any errors or inconsistencies in the dataset](#)
 - [Save a final copy of the dataset](#)
 - [Run frequency distributions for every variable in the final dataset](#)
 - [Make copies of any text files that require correction](#)
 - [Make corrections to any text files that require correction](#)
 - [Rename corrected text files to file names that are easily interpretable by the client](#)
 - [Export any paradata you will need to create a Response Rate Report](#)
 - [Create a final Response Rate Report](#)
 - [Upload file datasets, data files, and any supporting documentation to a secure folder](#)
 - [Notify your client that the data are ready](#)
 - [Maintain copies of all final datasets and data files in the "Delivered" folder](#)

Thank You!

For copies of this presentation or more information, contact:
Kelly Elver

kelper@wisc.edu

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