



HRS News

August 2015

Note from Director/Associate Directors

The past year has been another busy one for HRS, and one of the most successful yet in terms of funding. HRS investigators submitted proposals for four supplemental data collection activities: recruitment of the late baby boom cohort in 2016, venous blood collection for the full HRS sample, an in-depth cognitive assessment, and a life history mail survey. (These projects were described in previous newsletters.) The first three activities will be funded, at least in part, and funding for the life history mail survey also looks promising. In a time of scarce federal resources, that is a great achievement! For all of us on the HRS team, this will mean new and exciting challenges over the next couple of years to develop and carry out all of these new activities!

We had a productive meeting with the HRS Data Monitoring Committee (DMC) and representatives from NIA and SSA at the end of July in Washington, DC. Dr. Richard Hodes, the Director of NIA, attended part of the meeting, so we had to be on our toes! David, Ken, Mary Beth and Jessica updated the committee on ongoing and upcoming activities, and Sharon Kardia (HRS Co-PI from the School of Public Health here at UM) talked about the exciting developments and opportunities relating to the genetics data that we have on HRS respondents. The committee seems to be very pleased with what we've done and where we're headed.

Although our current grant runs for another 2 years, we are already planning for the next HRS renewal proposal. In the coming weeks, NIA will ask a number of external experts to write review papers on specific issues of relevance to HRS (e.g., psychosocial and social support measures; time use, physical activity and sleep; use of Internet as a supplemental mode; sample representativeness) to help identify priority areas for the future. We will also be working with NIA over the next few months to explore the budgetary implications of adding or dropping certain data collection components going forward. Never a dull moment on HRS!

We hope everyone has had an enjoyable summer. We look forward to an exciting and productive fall!

Introducing the Virtual Data Initiative by Michael Nolte

Housed within ISR, the Michigan Center on the Demography of Aging (MiCDA) data enclave for many years has provided a secure physical computing environment in which researchers can access and analyze restricted data files. The resource has been especially useful for junior academics and graduate students who do not have U.S. federal funding. A new resource has recently launched that should substantially widen the use of HRS restricted data. The Virtual Data Initiative (VDI) gives researchers remote access to restricted data products by using virtual desktop infrastructure technology – hosting a desktop operating system within a virtual machine running on an ISR server. Users are provided with a virtual Windows 7 desktop with a complete suite of data analytic software as well as Microsoft Office 2010. A unique password-protected profile is created for each user, providing access to the restricted data files specified in the individual User Agreement. All data remain on the MiCDA server, reducing the security burden on the individual researcher.

As with the brick and mortar enclave, access to the virtual enclave is limited to faculty members of accredited institutions of higher education, students who are currently enrolled in an accredited graduate or undergraduate program and other researchers who wish to use MiCDA restricted data files but are unable to fulfill the contractual conditions for obtaining the data directly.

Enclave staff members ensure that all restricted and public use datasets listed in the user's approved research plan are available from the Enclave user profile. Users receive assistance with dataset installation, software installation, operating system problems, statistical package operation, backups and user interface issues. Users are responsible for developing and implementing all data management procedures necessary to produce datasets to be used for analysis and the actual carrying out of statistical analysis.

As before, at the end of their Enclave term, users submit their analysis results (e.g. tables, coefficient listings, graphs) to a confidentiality review process designed to protect respondent confidentiality and minimize disclosure risk. Once the confidentiality review is complete, results are transmitted to the user via email or other digital format. By default, users of the MiCDA Enclave are not allowed to export respondent or establishment variables created from restricted data. It is possible, however, to create public data sets from restricted data through the use of disclosure limitation methods. Researchers who wish to export such data sets must submit a micro-data export application to the MiCDA Data Confidentiality Committee. Visit the MiCDA website for more information: <http://micda.psc.isr.umich.edu/enclave/>

Data Products by Tom Blackburn (for Theresa Norgard)

HRS products currently underway include the 2014 Early Core and Exit Releases, the 2014 Early Tracker release, the 2014 Final Post exit release, and construction of nutrition measures to accompany the recently released 2013 Health and Nutrition Mail Survey. Work is also progressing on coding the interview comments and open ends from the core and exit data collections, which will become part of the final release. The data processing group is also working with SRO on the 2016 screener effort, mainly in the area of constructing the HHID and PNs for new respondents, and will begin work on determining sample for the off-year ancillary studies.

Instrument Development by Kathy Terrazas

When we last reported on our activities back in January, the HRS instrument development team was close to launching the Blaise 5 Pilot survey. And we did, on May 18th. We had a bit of a bumpy road at first with the operation of the web sample management system, but after a few weeks of intense work and helpdesk communications with respondents, the way smoothed out considerably. We finished the 11 week data collection effort on August 2nd with a pretty decent response rate of 71% -- very close to what we've achieved on our other "off-year" HRS Internet Surveys. Our respondents seemed happy to give us feedback using the in-survey debriefing questions asked at the end of the regular interview. We received very high ratings for overall clarity of the questions, ease of navigation and the visual appeal of the survey. A healthy percentage of respondents said that in the future, they would prefer doing the survey on-line sighting convenience, having time to think about answers, to get records to give more accurate answers, to be able to take breaks, etc. Other data from the Pilot reveals that we've still got some work to do. For example, the average interview length of the Pilot survey was around 50 minutes. Now remember, the Pilot only contained 5 of the 20 HRS sections so, worst case scenario, the full on-line survey could take 3 hours – yikes! The only saving grace is, when asked to estimate how long they had spent doing the survey, most respondents thought it took less time than our timing calculations showed! So from the stumbles to the applause lines, we learned a great deal from this Pilot and with this knowledge we are better placed to complete the transition of the full HRS instrument to a dual mode instrument for the 2018 data collection effort.

Meanwhile, in April as we were attending to the last details for the May Pilot launch, our traditional pre-production phase on the main HRS survey commenced. Pre-production involves incorporating new content, fixing errors discovered during data analysis or from the prior wave field effort and sometimes cutting or revamping "out-of-date" survey content. Next comes the never-ending rounds of instrument testing to make sure everything has been programmed to

spec and is functioning properly. In addition to these more routine activities, it's a new cohort screen wave and that always entails a lot more complex work for our Co-PIs and the field staff and even more close collaboration between field operations and study staff.

We've recently added two new staff members who are currently learning about the instrument and all of the systems we use to develop it. We are pleased to see that they are picking things up very quickly and we are confident that they will prove to be valuable assets when we turn our attention to the 2018 Blaise 5, dual mode transition. At the time of this writing, we are preparing questionnaire documentation for the nearly 5,000 question main survey to submit to the IRB for our pretest in mid-October.

SRO by Nicole Kirgis

Pre-production activities are in full swing for 2016 data collection. We are busy with preparations to add a new sample cohort of about 5000 to the study--the Late Baby Boomers (LBBs), those born between 1960 and 1965. To add our new sample members, we will go back to households we pre-screened in 2010 as being in the LBB age range to confirm their eligibility as well as screen for eligibility at newly sampled addresses. A new component for the panel work will be asking all panel respondents for consent on whole blood collection. In addition, we will be running the Harmonized Cognitive Assessment Protocol (HCAP) study concurrently with main HRS data collection with a sample of about 5000 panel respondents 65+ (we are currently pretesting the questionnaire with two different sample groups). Data collection on our Blaise 5/MSMS web pilot wraps up at the end of July. In addition, we are gearing up for 2015 CAMS (the 8th round) and two other mail survey efforts (a small mail survey to some of the pre-identified LBBs and a mail survey on life history).

Outreach and Dissemination by Amanda Sonnega

Jessica Faul and Amanda Sonnega led the HRS summer workshop June 8-12. Thanks to Mary Beth, Jacqui, Lindsay, Helen, Charlie, and Peter Hudomiet (especially heroic because his dissertation defense was the next day!) for great lectures. Also thanks to Rebecca Gatward who gave a lecture on SRO procedures and Mohammed Kabeto for presenting on the Medicare linkage. A special thanks to our out-of-town colleagues who flew in to help out. Colleen McCullough from RAND presented on CAMS, and Bob Wallace presented on health and physical functioning. We appreciate the presentation by Orla Hayden who led the afternoon lab session on the RAND HRS, and Drystan Phillips was joined by Ashley Lin to lead the lab on the Gateway to Global Aging. Thanks to Ryan McCammon for leading out the lab on data analysis and to Mike Nolte for presenting on restricted data. Many thanks to the folks

who helped out in the lab: Nada Wasi, Chichun Fang, Hali Hassan, Eduardo Galvan, Chris Plotts, and Kate Mikesell and to Janet Keller, as always, for great computer help. Finally, thanks to Joyce Sisung for help with the food and conference materials.



Administration by Cathy Liebowitz

The admin team has been busy since we last shared. In February of this year, we welcomed Jana Deatruck to the crew. Jana joins us with years of research administration experience – both in a research program and in a central office. She has flawlessly assumed the role that was vacated by Carol Bowen at the end of calendar 2013. We are very excited to have Jana on board.

We have over the past fiscal year submitted 19 proposals from our research program, totaling more than \$41m. During the same 12 months, we received and processed awards for over \$19m in research funding. Some of the proposals are still pending award – so the figures are still growing.

We processed about 150 Travel Expense Reports totaling almost \$200k, and procured over \$550k of materials, goods and services.

In addition to proposals, travel and procurement, we've provided staffing for 6 of 7 HRS exhibits. We've supported the HRS Summer Institute weeklong workshop, as well as several other workshops, seminars and meetings.

The admin team is involved in space and facilities issues and we coordinated the consolidation of stored materials and reduced our overall stored materials by the equivalent of more than 60 drawers of materials. We have plans to continue reducing the hardcopy storage, too, which includes scanning or digitizing these materials, and freeing up valuable space and resources for additional research activities.

We have been helpful in getting data into the hands of researchers – processing data agreements for HRS restricted data, HRS sensitive data, Census data, and more. And with all of this activity, we have found time to work with IRBs and other units and central offices, and process many human resources transactions, provide Center projections, update space and telephone surveys, tweak databases, create databases, develop new procedures, renew projects, serve on committees, and more.

We've been busy.

Personnel Changes



Andrea Sims joined HRS as a Survey Specialist Associate tester in instrument development. She started at ISR in 2008 as a phone interviewer in the Survey Services Lab, and most recently worked in the SSL as a production manager for the Survey of Consumer Attitudes and other phone studies. She grew up near Rochester, NY and moved to Chicago for college, studying literature and religion. In 1995 she moved with her husband to Providence RI, and they finally settled in Ypsilanti in

2004 with their three sons, who are now teenagers. Andrea enjoys reading, gardening and cooking.

Abdelaziz Adawe is a Survey Specialist Associate in the Health and Retirement Study Program. Previously, Abdelaziz was a Lab Supervisor at the Institute for Public Policy and Social Research: Office for Survey Research. He has a Bachelor of Arts-Sociology from Michigan State University (GO GREEN!!!). Abdelaziz loves spending time with his large family (5 brothers, 5 sisters, 3 nieces, and 2 nephews). He also enjoys playing soccer and discussing politics, religion, and sports while drinking tea.



HRS in the News

Retirement and Health

A new report from by Aspen Gorry, Devon Gorry, and Sita Slavov of NBER finds that health and life satisfaction appear to improve in the initial years of retirement. They use eligibility for Social Security and employer-sponsored pensions and coverage by the Social Security earnings test as a way to account for the fact that those in poor health are more likely to retire. Life satisfaction appears to improve within the first 4 years of retirement; whereas improvements in health are more likely to show up later. View the full coverage here:

www.plansponsor.com/NBER-Says-Health-and-Life-Satisfaction-Improve-in-Retirement/

HAGIS Underway

A new HRS sister study, the Healthy Ageing in Scotland (HAGIS) initiative, has launched in Scotland. See Ken's comments: <https://www.holyrood.com/articles/news/new-study-launched-help-improve-lives-elderly>

Well Done!

Congratulations to Maggie Levenstein and Jessica Faul on their promotions this spring. Eric Kim, a student working with Jacqui Smith, successfully defended his dissertation and began a post-doctoral fellowship at Harvard. Bill Chopik also recently completed doctoral work with Jacqui and is now an Assistant Professor of Psychology at Michigan State University. Peter Hudomiet, a student working with Bob Willis, successfully defended his dissertation and began a job at RAND.