

Note from Director/Associate Directors

While the entire HRS team has been working over the last year to successfully complete the 20,000 interviews of the 2014 field period, the investigators have also been busy working to make the future HRS even more scientifically valuable and innovative. A new supplemental proposal to collect venous blood on the entire HRS sample during the 2016 field period received a “perfect 10” during its peer review. Now, because financial pressure at NIA will force cuts of undetermined size, the investigators will have to work hard to make the case to NIA to preserve as much as they can, while also working to finalize the protocol and blood tests that will be performed in order to best serve the wider research community. In November another HRS supplement was submitted proposing a new population study of dementia and cognitive impairment. This successor to the highly successful ADAMS study of over a decade ago will utilize new cost-effective approaches to expand coverage and was also developed in partnership with many of the international HRS sister studies to create the potential for a global study. At the same time, an R01 proposal was submitted by Jacqui Smith to fill in detailed information on the “life history” of HRS respondents, including where people have lived throughout their lives, their relationships with parents and siblings earlier in life, and their health during early/mid adulthood. These new data sources will greatly enhance the already rich information available in the HRS.

It’s obvious that all of these HRS efforts, from field work, to data release, to developing new proposals, to tracking the budgets and contracts of all these complex interlocking pieces, take an enormous amount of time and teamwork to be completed so well. The HRS team is truly an amazing group to be able to keep the HRS enterprise humming along so well. Thanks to everyone for their incredible efforts in 2014, and we look forward to exploring all of these new paths with you in 2015!

Data Products by Theresa Norgard

The following summary applies to three areas: HRS Coding, HRS Data Products, and the HRS Pension Project. The HRS coding effort is coordinated by Kelly Kempter; data products by Tom Blackburn and Theresa Norgard, and the HRS Pension project is coordinated by Amy Butchart.

HRS QUESTIONS

The “HRS Questions” email account exists to support HRS data users who have questions about our data. Although clear documentation exists on the HRS website, we provide additional guidance to users in registration, finding documentation, identifying questions of interest, understanding and merging our data, and a myriad of other topics. Users ask questions from the simple, “I lost my password.” to the mundane, “When will the 2012 data be released?” from the complex, “Does this mean that what I have analyzed with strata, cluster, and weights variables is wrong?” to the out of bounds, “Can GEE analyses in Stata be used with the survey “svy” command in Stata?” And yes, these are real HRS Questions; we didn’t make them up.

When a user sends an email to HRS Questions, we first try to answer it ourselves, and much of the time we are easily able to do so without placing a burden on other staff members. Other times we need to forward the email to a staff member who is more knowledgeable in the subject area. On average, we field 753 user questions each year. So far in 2014, we have answered 768 emails, with our busiest months being September and October. To date, 31 staff members have participated in answering HRS Questions this year. At times, a thorough answer requires a response from multiple staff members. On average, we are able to respond to user inquiries in about three days, well within our posted time of 10 days.

The HRS Questions mailbox is checked every day by Kelly Kempter and Brett Vogel. The HRS Questions provides a valuable service to users and involvement in HRS Questions is a great way for staff members to learn more about the complexities and components of our survey. Thank you for your help – and a special thank you to Kelly and Brett!

HRS PENSION PROJECT

The work of the pension team contributes to the HRS research areas of income, wealth, work, and retirement. The Pension Project is led by Amy Butchart and supported by several very capable temporary employees. We use HRS survey responses concerning employers, jobs, and pension participation to select employers and pension plans relevant to HRS respondents. We obtain these pension documents and model the provisions in these pension plans. We recently finished collecting pension plans for the jobs held by HRS respondents in 2010, collecting and indexing more than 3,200 documents. Our main focus now is on modeling the provisions in the approximately 850 defined benefit pension plans we've collected.

We make a separate model for each pension plan, writing a set of mathematical formulas specific to that plan. Each formula produces benefit estimates that vary depending on how long an employee works, how much he or she is paid, and when he or she leaves that employer. Once we write the set of formulas for a plan, we test the model by using simulated respondents and by using the dates of hire, annual income, and work hours reported by the HRS respondents enrolled in that plan. We have written more than 3,600 formulas for more than 400 defined benefit plans so far, and are continuing to write formulas and test the models.

The goal of our work is to model all the defined benefit pension plans in which HRS respondents were enrolled in 2010. This work will then be released as restricted data for researchers to use to address questions concerning pension wealth and the incentives employers provide for employees to continue to work or to retire.

Also in Process

Other HRS products underway include the 2012 Final Core and Exit Releases, construction of nutrition measures to accompany the recently released 2013 Health and Nutrition Mail Survey, and the 2012 Tracker file. The data processing group is also working on creating utilities that will be used to extract data and metadata from the 2016 field effort. The data extraction utilities will need to function with a new version of Blaise and multiple modes of data collection. The group is also working on processing select types of data from the ongoing 2014 field effort, including grid cleaning, household splits and reconstitutions, and readying databases for the open end and comment coding effort.

Instrument Development by Kathy Terrazas

Since 2014 field interviewing is entering into the home stretch with very few, if any, production issues to address, the instrument development team is now able to devote all its attention to work on three initiatives: the transition to the new Blaise 5 programming platform, designing a web version of the HRS main instrument, and re-engineering SRO's Multi-mode Sample Management System (MSMS).

We continue to partner with SRO and Stats Netherland programmers to debug and enhance the Blaise 5 program suite in our effort to transition our complex survey. The motto of our HRS programmers, with Rhymney Weidner in the lead, seems to be "if you build it, we will break it." Luckily, our relationship with Stats remains solid and positive despite the ups and downs, and we are making steady progress toward our goal.

On the web survey design front, the development team soldiers on, now joined by various SRO expert area groups and other ISR project staff, with the hard work of turning the survey into a viable and sustainable dual mode instrument. We've reviewed, question-by-question, 5 of the 23 sections of the HRS instrument with the goal of launching a pilot interview with about 1,000 of our sample members. In this extensive review, we've addressed issues such as data comparability between the two modes, the revision of onscreen instructions designed specifically for interviewers to make them also work well for respondents, and ensuring every question in its current format will work for both interview modes. We are close to completing 4 of the 5 sections, including having demo'd sections to internal and external Co-Investigators for their input on difficult substantive issues that have arisen during design review. The pilot interview will be mostly done online, but we are also asking several telephone facility interviewers to administer the survey to respondents. In this way, we hope to obtain valuable feedback on how well we've adapted the survey to a viable dual mode instrument.

And the final initiative—only lately commenced—ties everything together. Our programmers are working with the MSMS technical team to re-engineer the system to a) work with Blaise 5 software and b) to program and test the totally new and complex maneuvers necessary to launch, manage and save data collected in multi-modes with two respondents in a household who must share data across two interviews in real time. Getting this system working is a vital component in successfully achieving the mandate of being able to offer web surveys in the 2016 data collection wave.

SRO by Nicole Kirgis

We are in the final stretch of 2014 data collection! We anticipate production into early 2015 with a goal of completing approximately 20,500 interviews. While we are not even out of the field for 2014, we are already preparing and planning for our "off" year efforts, which include a web/CATI Blaise 5 pilot and mail studies. In addition, we already have our sights on 2016 field work, anticipating a bigger-than-ever effort comprising our normal panel work (but with an added feature of consenting for whole blood collection), adding the Late Baby Boomer cohort to the sample (using an innovative sample design and innovative 'touch-screen screener'), and anticipating a new study to run concurrently with data collection to measure cognition (building off our current work on the Cognition Validation project).

Outreach and Dissemination by Amanda Sonnega

Amanda Sonnega and Jessica Faul conducted a well-attended pre-conference workshop at Gerontological Society of America in Washington, DC in November. HRS co-investigators Eileen Crimmins, Jacqui Smith, and Bob Wallace made presentations. The half-day workshop titled Biomarkers and Beyond, focused on new health HRS information. Eileen shared up-to-date information about biomarker data, and Jacqui summarized the available psychosocial data and illustrated how they can be used with biomarker data. Bob reviewed the new nutrition data and previewed plans for immunological assays that are planned as part of the new venous blood collection. Jessica overviewed the genetic and telomere data. And Morgan Levine, who is a graduate student in Eileen's program, provided a research example using the genetic data. Our NIA project officer Georgeanne Patmios attended the workshop.

HRS in the News

The benefits of electronic medical records may not be shared equally by all, especially older Americans with low health literacy. HRS co-investigators Helen Levy and Ken Langa have published a study with Alex Janke in the *Journal of General Internal Medicine* that uses HRS data on internet use and health literacy from 2009 and 2010.

They find that only 9.7% of participants over age 64 who have low health literacy used the internet to obtain health information. By contrast, 32% of those with adequate health literacy access health information online. According to Helen, these results "suggest that there's a digital divide when it comes to health care. Older adults with low health literacy especially represent a vulnerable population that's at high risk of being left behind by the advance of technology." Ken notes that "programs need to consider interventions that target health literacy among older adults to help narrow the gap and reduce the risk of deepening disparities in health access and outcomes."

View the journal article here:

<http://www.ncbi.nlm.nih.gov/pubmed/?term=helen+levy+journal+of+general+internal+medicine>

Personnel

Apoorva Jadhav joined the HRS in September 2014 as a NIA postdoctoral fellow with an appointment in the Population Studies Center. During her time here, she will be working on the HRS and HRS sister studies to explore the relationships between widowhood, poverty, and health, under the mentorship of David Weir. She recently graduated from the University of Pennsylvania with a degree in Demography, and has a Master's in Public Health from Emory University. Prior to her doctorate, she worked with NGOs in India working on primary and reproductive healthcare for women, a faith-based organization working on topics related to HIV and orphanhood in Tanzania, and domestic healthcare policy in the United States at the Advisory Board Company. She is looking forward to continuing some of her work on socioeconomic and demographic change in India and around the developing world while at Michigan under the backdrop of aging. During her free time in Ann Arbor, she loves eating her way through the city, and is always looking for like-minded colleagues to explore hidden culinary treasures around the area.



Some other new faces you might see are a team of four students and recent grads who are helping with pensions. Sean Beaulac, Patrick Balke, Cam Lindsay, and Yanling Xu are coding pensions, which means writing the equations that describe what monetary benefits employees participating in a particular plan can receive. The equations need to be written in such a way that the plan's benefits can be predicted for any HRS respondent participating in the plans and for any simulated respondent whose benefits a researcher may want to model. Sean, Patrick, Cam, and Yanling are working with Amy Butchart and Helena Stolyarova. Chichun Fang, Nada Wasi and Charlie Brown and David Weir are all involved in directing the work. Liam Schilling is another student who is primarily working with Theresa Norgard on various projects and is also assisting with the pension work.

Fun Stuff

Congratulations to **David Weir** on his milestone birthday of 60!



Jack Chen and his family welcomed the newest member, Evelyn Chen, on October 12th. She weighed 7 pounds 3.5 oz and was 20.5" long. Congratulations Jack!

Lekisha Maxwell and **Mary Cheatham** helped PAC bring Halloween festivities to us this year. Their efforts were enjoyed and appreciated by all!



Laura Mayo-Bond and Joyce Sisung (with Grandpa, Lilly, and Marilyn)

Mary Cheatham (little devil) and Lekisha Maxwell (witch with style) with ISR friends



Scary good goodies!

