April 13, 2018

Happening in SRO

You can find this "Happening in SRO" and all similar newsletters on the SRO Intranet Home Page, located at: http://isr-wp.isr.umich.edu/srointranet/ under Recent News.

If you have items for the newsletter, please let Ann Vernier or your unit director know.

SRO Closure Schedule

SRO will be closed a total of 3 additional days in connection with the official UM Holiday closures. Staff members have the option of taking these 3 days off during the holiday periods or making arrangements with their supervisor to work, if that is preferable.

2018 SRO Designated Closure Days:

- August 31, 2018 (Labor Day weekend)
- November 21, 2018 (Thanksgiving week)
- December 24, 2018 (1 day before the U-M holiday/season days)

The calendar below shows the SRO Closure Days and U-M Holidays and Season Days for the fall/winter period, 2018-2019. The full list of U-M observed holidays is available at: https://hr.umich.edu/working-u-m/my-employment/holidays-season-days

2018

AUGUST

s	m	t	w	t	f	s
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

SEPTEMBER

s	m	t	w	t	f	s
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

NOVEMBER

s	m	t	w	t	f	s
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

DECEMBER

s	m	t	w	t	f	s
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1				

SRO closure
August 31, 2018
November 21, 2018
December 24, 2018

UM Holiday
September 3, 2018
November 22-23, 2018
December 25, 2018
January 1, 2019

UM Season day
December 26-28, 2018

Quality Assurance
(Grant Benson on behalf of the QC Implementation Team)

There has been a lot of work on quality assurance at SRO over the last couple of years that finally seems to have matured and come to a critical point where we can see very real and very meaningful progress. The QC Implementation Team would like to take this time to share where we are with evaluating recorded interviews and what you can expect.

Focus: Major Errors

Historically, we have tracked major and minor errors and provided feedback to interviewers on both. However, there is a very real difference between these two. Specifically, major errors are those that *could have* influenced the meaning of a question, while minor errors are deviations from GIT that are unlikely to have changed the meaning of a question.

After reviewing the results of literally thousands of evaluations, the QC Implementation Team has come to the conclusion to focus almost exclusively on major errors moving forward. And this makes sense. These are, after all, the errors that could directly impact quality, while the minor errors are really more indicative of developing poor GIT habits.

Why is the focus on major errors so exciting? Well, over the last year, our QC professionals have been meeting on a monthly basis to all rate the same interview at the same time and then discuss it. When we look at how they score major errors, we are finding that they score the same way over 90 percent of the time! This is in excess of the industry standard, which targets 85% inter-rater reliability. So one huge benefit of focusing on major errors only is that it won't matter who evaluates an interview, the results are going to be the same. On the other hand, because minor errors are far less clear-cut, they also tend to have much greater variation on how they are identified.

Focus: Error Rates

We have tended to focus on *numbers* of errors in the past, mostly for technical reasons. So we have generally determined the quality of an interview based on how many errors were made (especially major errors). This was done partly because our questionnaires are often so complicated that we don't know how many questions have been evaluated. But focusing on error counts rather than error rates makes it more difficult to reliably compare between interviewers and between projects.

There will be a transition period, but starting in April for some projects, we **will** be able to determine how many questions have been evaluated, which will allow us to get a *rate*, rather than a count. So the rate will be based on the <u>percent</u> of questions with errors, not the count. This is exciting because it allows us to not only have a more meaningful comparison of errors between projects, but it will even allow us to look at how we do over the lifecycle of a project.

Focus: Error Types

A third area of change coming directly from focusing on major errors and being able to track rates is that we will now be reporting out errors by error type. This is significant, because we believe that this will help us to really focus on treating these errors more directly as opportunities for focused training, rather than having the focus be on how many times someone made a mistake. Just as importantly, this allows us to really understand and highlight the *success* areas that we have not only individually, but across teams. If we can reduce or eliminate one or more types of errors, that's a major accomplishment.

Putting It Together

How will all this come together? Again, we expect this to start rolling out this month (April 2018) for some studies and we will try to transition all projects in this direction as quickly as possible. We are still putting finishing touches on the resulting reports, but you can see a current draft below:

Evaluation History: % Error by Error Type, Across Project Evaluations To-Date							
Evaluation Date	Data Entry	Feedback	Other	Probing	Reading	Language	Retraining Date
10/14/2016	3.1%	1.1%	4.1%	0.0%	1.0%	Spanish	10/19/2016
11/19/2016	2.3%	0.0%	0.0%	1.2%	2.0%	Spanish	N/A
12/12/2016	3.2%	3.1%	0.0%	3.0%	0.0%	English	12/14/2016
03/03/2017	2.2%	0.0%	1.1%	2.0%	1.0%	Spanish	N/A
04/21/2017	2.0%	0.0%	2.2%	2.7%	3.1%	Spanish	4/27/2017
Personal Average	2.2%	0.7%	1.2%	1.5%	1.1%		
Project Average	2.4%	0.8%	0.2%	1.5%	0.9%		
Personal Average: Total count of your major errors in this category / total count of all questions evaluated, across all your evaluations to date.							
Project Average: Grand total of major errors in this category across all interviewers / grand total of questions evaluated, across all project evaluations to date							

So, there is a lot of stuff here. First, notice the focus on “Error Type”. This means we are really just looking at errors that we know could have an impact on data quality (“major errors”). Second, you will see the error rates by error type. Again, by looking at it this way, our expectation is that we can better focus not only on where we need to put our effort into retraining, but also where we can celebrate success. Finally, look at the last two rows. Here, we can track the interviewer’s personal overall rate (and therefore change over time) as well as how he or she compares to the project overall.

All in all, we believe that these changes are significant and will be beneficial to maintaining and improving SRO’s reputation for producing high quality data.

QC Costs

Another area where we have been hard at work in the past 6 months has been in modifying how we track the cost of conducting quality assurance. By updating the way we track and report on QC effort, we will get a better handle on the full cost of QC – both in terms of time that the evaluators and retrainers spend, and in terms of the time that interviewers spend.

To this end, starting in April, projects will be creating new short codes just for QC. Within each short code, there will be a series of new tasks. These include:

Eval-Admin (used by QC staff to charge their training time at the start of each project)

Evaluation (used by QC staff to charge time doing the evaluations)

Interviewers will continue to use Train-Get when receiving feedback or retraining from an evaluation, and retrainers will continue to use the Train-Give activity code.

On the verification side, we are similarly adding a series of new activity codes, which include Verif-Admin (for training) and Verification (doing the actual verification).

The new codes will appear in both Tenrox and ET.

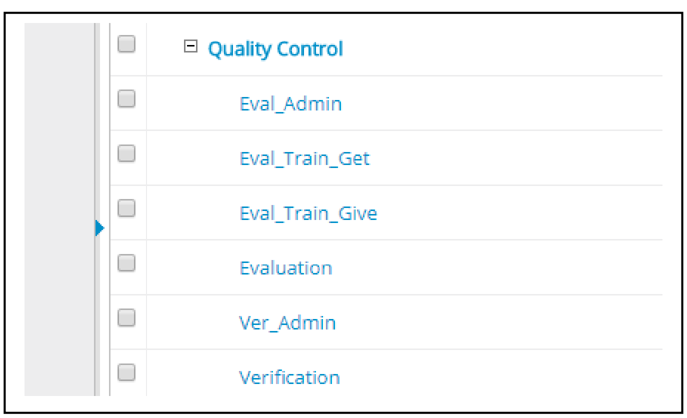
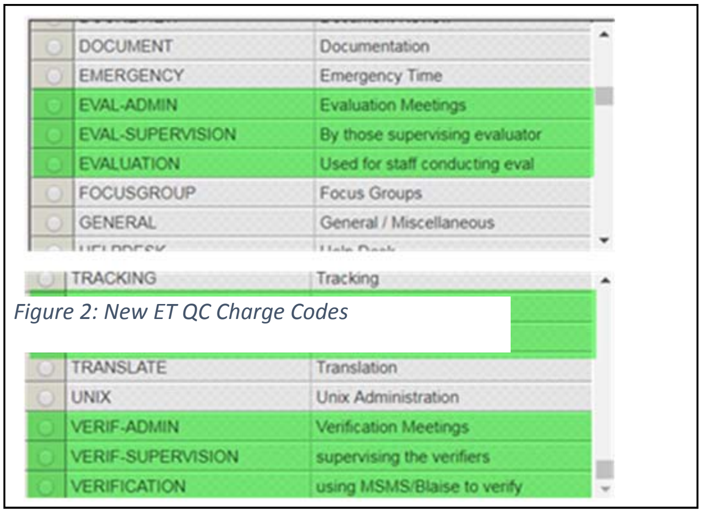


Figure 1: New Tenrox QC Charge Codes



DOCUMENT	Documentation
EMERGENCY	Emergency Time
EVAL-ADMIN	Evaluation Meetings
EVAL-SUPERVISION	By those supervising evaluator
EVALUATION	Used for staff conducting eval
FOCUSGROUP	Focus Groups
GENERAL	General / Miscellaneous
TRACKING	Tracking
TRANSLATE	Translation
UNIX	Unix Administration
VERIF-ADMIN	Verification Meetings
VERIF-SUPERVISION	supervising the verifiers
VERIFICATION	using MSMS/Blaise to verify

Figure 2: New ET QC Charge Codes

Figure 3: New ET QC Charge Codes

Summary

Overall, we believe that these changes will be critical to helping us maintain and even improve on our reputation for data quality. By adding a cost element, we can more reliably make a true cost-quality trade-off in determining how many cases to evaluate and which cases to evaluate. Moreover, but focusing on both error rates and breaking out the tracking of errors by type, we should be in an improved position to provide more directive retraining and in tracking the effectiveness of that training.

Nancy Knows
(Nancy Bylica)

Are you opening your windows because your office is too hot or using space heaters because your office is too cold? Before you open windows or ask to have a space heater please contact ISR Facilities via email: fop@isr.umich.edu or use the online Maintenance Request Form: http://fop.isr.umich.edu/maintenance.cfm which can be found on the SRO Homepage under Quick Links (Facility Requests).

It is important that ISR Facilities know of any heating and cooling issues to ensure our building is operating properly.

ISR Facilities will work with UM maintenance to ensure the heating/cooling systems are functioning properly. If it is then determined that you still need a space heater, we will be sure to purchase one that meets the guidelines outlined by OSEH Fire and Safety.

Space Heater Recommendations: OSEH Fire Safety Services does not recommend specific makes/models of portable space heaters for use on campus, but we do have the following guidelines for any heaters that are used:

1. All heaters must be UL listed or Factory Mutual approved for their intended use. Heaters must have a thermostat to automatically shut down the unit when the desired temperature is achieved.

2. Heaters with exposed heating elements or open flames, even if they are UL listed, should not be utilized.

3. Heaters must have "tip protection" - the heater must turn off automatically if tipped over.

4. Heaters must be kept at least 3 feet (36 inches) from all combustible materials.

5. Do not place heaters under desks or in other enclosed areas (unless you have a Workstation Warmer).

6. Heaters must NOT be utilized while unattended, and must be monitored while in operation.

7. Heaters must be plugged directly into a wall receptacle. Never plug a heater into an extension cord or portable power strip / surge protector (unless you have a Workstation Warmer).

8. Heaters need to be monitored daily. Heaters that are missing guards, control knobs, feet, or other parts must be taken out of service immediately and repaired by a competent person or discarded.

There are two U of M approved heaters:

1. The Workstation Warmer is one recommendation (uses only 1.5 amps).

2. Oil filled convection heater is another recommendation (uses 12.5 amps). Note: this uses more that ½ of 1 circuit.

Opening windows is not recommended (especially during warmer weather) as it can affect our heating and cooling system by causing the system to use much more energy in taking the humidity out of the air before discharging it back into the space.

Our Work in the World – The Growing College Graduation Gap

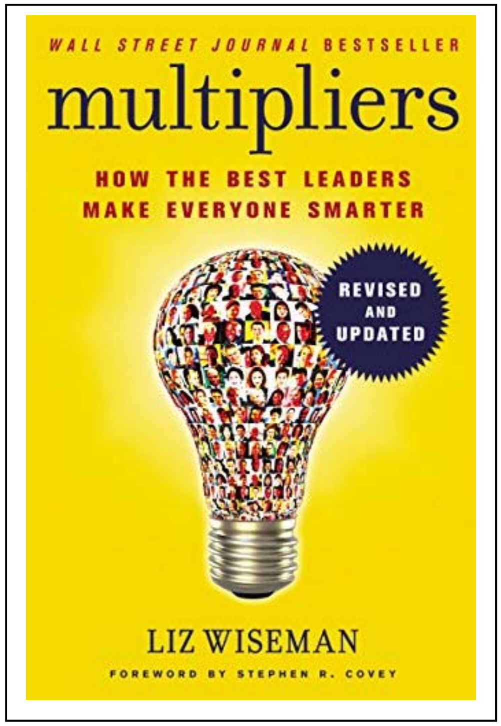
(Gregg Peterson)

The work we do helps inform public discourse in important media outlets. In an Op-Ed in a recent NY Times, columnist David Leonhardt outlines a concerning trend: "Even as the college-*attendance* gap between rich and poor has shrunk, the gap in the number of rich and poor *graduates* has grown." The column draws on the findings in a recent paper published in the journal *Demography* by Fabian Pfeifer, a co-investigator for the Panel Study of Income Dynamics (PSID).

https://www.nytimes.com/2018/03/25/opinion/college-graduation-gap.html

What Have We Been Reading
(Grant Benson, Sarah Crane, Lloyd Hemingway, Margaret Hudson, Vivienne Outlaw, Sharon Parker)

Liz Wiseman (2017). *Multipliers: How the Best Leaders Make Everyone Smarter* (Revised edition). HarperBusiness.



Liz Wiseman identifies leadership characteristics as falling in a range between Multipliers – those who can get more out of people than they themselves know they could give, and Diminishers – those who drain intelligence, energy and capability. After conducting structured interviews with 144 'nominators', they identified key characteristics of both Multipliers and Diminishers across a variety of industries.

Based on these interviews, Wiseman identified 5 dimensions characterizing leaders as either Multipliers and Diminishers:

	DISCIPLINE				
	ATTRACTING AND OPTIMIZING TALENT	**CREATING INTENSITY**	**EXTENDING CHALLENGES**	**DECISION MAKING**	**OWNERSHIP AND ACCOUNTABILITY**
MULTIPLIER	Talent Magnet – attracts and deploys talent	Liberator who creates a safe environment for bold thinking	Challenger who defines opportunities, but seeks input	Debate makers driving sound decisions through debate	Investor who gives others ownership and full accountability
DIMINISHER	Empire Builder – acquires resources and does not fully optimize them	Tyrant who insists on only one way to do things	Know-it-all who gives directives	Decision makers who try to sell their decision (only)	Micromanager who jumps in and out of the process

The DCO management team read this book together and discussed the content. We generally read one chapter a week. Each week, we would consider the chapter and attempt as a unit to apply some key lessons. Overall, we thought that this was an interesting but challenging book. On the one hand, the focus on the two extremes of Multipliers and Diminishers makes the contrast stark and easy to identify. On the other hand, we found it more difficult to think through application of the principles because of the extreme examples. This was a little disheartening as we all desire to be great leaders. However, the process of examining our own practices and sharing our challenges and successes within the team was a useful endeavor. We took some solace in the last chapter, which indicates that one does not have to excel or even be adequate at all five disciplines – excelling at 2 or 3 is more than enough if one can also minimize the negative impact of the other 2 or 3 disciplines.

There are definitely opportunities for us to create an environment where we can do a better job of being leaders who encourage our team members to exceed and excel. This will be a process that we will be building upon as we continue to explore ways to become better at optimizing talent, allow for different approaches to solving problems beyond the way we have always done, offer our team members challenges to stretch, increase debate, and extend areas of responsibility.